"The digestive health market has exceeded expectations, with US retail sales estimated to reach more than $5.1 billion in 2019. Previously, the category was supported by Rx-to-OTC conversions in the antacid segment, boosting sales dramatically in 2015. Since then, growth had stabilized and was predicted to flat line."

- Andrea Wroble, Research Analyst

This report looks at the following areas:

- Digestive health symptoms are infrequent
- Value-oriented consumers choose store brands
- Holistic approach to health challenges use of OTC products

New product innovations, refreshed marketing strategies and rehydration claims are bringing success to the once stagnating market.

DID YOU KNOW? This report is part of a series of reports, produced to provide you with a more holistic view of this market
# Digestive Health - US - August 2019

## Executive Summary

**Overview**

- **Market performance**
  - Figure 1: Total US sales and fan chart forecast of digestive health products, at current prices, 2014-24

- **Antacids continue to dominate market; stomach remedies heat up**
  - Figure 2: Total US retail sales and forecast of digestive health products, by segment, at current prices, 2014-24

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  - Figure 4: Multi-outlet sales of antacids, by leading companies and brands, rolling 52 weeks 2018 and 2019

- **Holistic approach to health challenges use of OTC products**
  - Figure 5: Trial and interest in alternative digestive relief methods, June 2019

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- **Knowledge is power; at-home testing opens the door for personalized treatment**
  - Figure 6: Trial and interest in select alternative digestive relief methods, June 2019

- **Young women aren't treating frequently experienced digestive health symptoms**
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- **From symptom relief to lifestyle recovery**
  - Figure 8: Multi-outlet sales of digestive health products, by select companies, rolling 52 weeks 2018 and 2019

**What it means**

### The Market – What You Need to Know

- **Digestive health market exceeds expectations**

- **Big gains for stomach remedies – at what cost?**

- **Young women could be the new target for digestive remedies**

- **Our gut instinct on CBD**

- **Lifestyle changes challenge symptom-reliant products**

- **Wellness seekers welcome hydration**

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Hydration claims make a splash
Single pack formats promote on-the-go use
Probiotics struggle to maintain the hype
An emerging relationship: gut and brain
Personalized health information = consumer action

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Probiotics lose sales and usage

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Personalized approach to digestive health

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Consumers treat digestive health concerns reactively
Young women aren’t seeking treatment for regular symptoms
When assessing digestive health products, age matters
Living, breathing, eating and digestive discomfort
Consumers are not committed to probiotic use
Lifestyle changes hinder OTC treatment

Product Usage
Consumers reactively treat digestive health issues
Multiple products needed to address digestive health issues
Female consumers are key shoppers for digestive health market
Entering middle adulthood impacts female purchase behavior
Pregnancy symptoms result in digestive discomfort
Fiber supplements should target male demographic

Digestive Health Symptom Frequency
Digestive health concerns occur infrequently
Regular incidence of heartburn and bloating drives product usage
Turning tummy troubles to product bundles

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