

Digestive Health

*Gastrointestinals, Probiotics
& the Expanding CHC Market for
Digestive Health Solutions*

An all-new category report

Key Features of the report:

An in-depth exploration of the **CHC GIs & Probiotics** market, including **Antacids, Laxatives, Antidiarrhoeals, Liver & bile remedies, ORTs, Probiotics** and more

Coverage of 15 major markets from across the globe, with topline sales, brand & marketer performances, the latest developments, launches and promotional campaigns

Very latest **year-end 2025 sales** from the just-published **DB6**, our dedicated CHC sales database, plus historical growth rates back to 2021

Selected **category sales segmented** by product type in each country

Internet & mail order channel sales for every market profiled

Case studies of key brands, highlighting growth drivers, sales, NPD activity and consumer & HCP promotion

A look to the future includes long-term **forecast sales** for all categories and countries to 2030 & 2035, plus the most up-to-date short-term forecasts (to 2026 & 2027)

Sales of **Gastrointestinals**, including antacids, ORTs, laxatives, digestive enzymes & more, are being driven by factors such as modern fast-paced stressful lifestyles, rising consumer understanding of digestive conditions, targeted launch activity and an uptick in foreign travel. Added to that is a trend towards GLP-1 use and a need to counter common side effects, most of which are digestion-related (nausea, diarrhoea, constipation, bloating). Forecast to be among the fastest-growing CHC categories in the next 5-10 years, Gastrointestinals is a key arena for future development, including key niches such as food intolerance, hangover cures and rehydration wellness.

Adjacent to this, **Probiotics** continues to be one of the fastest-developing CHC categories, boosted by widening acceptance of the health benefits of “the biotics family” and understanding of the gut microbiome’s role in multiple facets of health. The market is primed to expand via new launches across an ever-widening range of categories, including heart, brain and joint health, not to mention immunity, weight management and skin health, backed by a growing body of scientific evidence supporting their efficacy.

By examining 10 core markets in detail (and additional key markets in brief), analysing brand performances and launch activity, our **Digestive Health** report aims to investigate the untapped potential in this CHC category.

Key questions investigated in this report

What are the key differences from market to market in terms of growth drivers, consumer choices and competitive landscape?

What can be learned from the most successful marketers & brands?

Has NPD benefited the market and does it offer a route to growth?

Which categories and segments are driving current growth and which are best placed for future dynamism?

Can new niches and underserved demographics be identified?

What does the future hold for Digestive Health brands and where do the best opportunities lie?

Assessing the short-term outlook, the report includes **full year 2026 & 2027 forecasts for all categories** in each market profiled.

With launch activity in GIs slowing year on year, while probiotics still see some of the highest NPD activity, has the impetus shifted from quantity to quality?

New product development is explored across markets, including Rx-to-OTC switches, delivery format innovations, new benefits and more.

Brand case studies evaluate the key lessons to be learned from rising star brands and established products, including consumer messaging, digital strategies and portfolio development.

USA | Oral rehydration treatments

- DripDrop** was extended in 2024 with Zero Sugar drink mix sticks, accompanied by a digital-first ad campaign featuring motivational speaker and Peloton instructor Kirsten Ferguson as brand ambassador; subsequent launch activity included new flavours and variety pack SKUs
- Social media promotion includes an active TikTok and Instagram presence; a pinned video from 2023 reacting to criticism of the brand has reached over 6mn views
- Zero Sugar portfolio was further extended in December 2025 with Zero Sugar Plus, containing 3x the electrolytes of the leading sports drink alongside vitamins, minerals and amino acids
- Brand's retail presence was also expanded in 2025 via expansion into Costco stores, including rollout of a Zero Sugar Lemon-Lime + Watermelon version
- BodyArmor** is growing well, with a limited-edition line extension in mid-2025 focusing on "impossibly cold" sensation in response to summer high temperatures and 2024 seeing launch of a caffeine-enriched presentation for energy
- Lower tier launches are increasingly focusing on secondary or adjacent benefits to stand out, such as 2025 launch **Unwell Hydration** from Alex Cooper's "Call Her Daddy" podcast brand; a proprietary formula with green tea extract is claimed to support focus and aid recovery
- Ultima Daily Focus** (Ultima Health, December 2025), part of the Ultima brand, is also positioned for concentration and mental focus with added L-theanine, caffeine and antioxidants
- Kinderfarms' **Kinderlyte** stands out via 2026 launch of Plus range comprising Gut Health prebiotic and ORT combination and Immune Support, with added zinc, magnesium and elderberry extract
- Maeva Probiotic Electrolyte** (Maeva, January 2026) is a probiotic-enriched ORT specifically positioned to support users of GLP-1 weight loss treatments



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China | Probiotics

Positioning for probiotics in China


Well-established: Digestive health, Immunity, Bone health, Vaginal health, Energy

Low presence: Allergy, Skin health, Weight control, Cholesterol

Engage bowel movements in 3 days

Three powdered probiotics drinks for children followed in 2025, for gut health, immunity and allergy management; this followed a notable increase in consumer awareness of the importance of intestinal health and parental interest in children's healthcare products with specific and visible benefits such as bowel movement and allergy management

Brand	\$mn	25/24	CAGR 25/21
1 Biostime (Health & Happiness)	115.6	+1%	-6%
2 Meichang / Ma Mei (Beijing/Hainan / Hainan)	108.0	+4%	+2%
3 Libun Lactophlin (CR Jiang Zhong)	70.9	-7%	+6%
4 Biflca (Shanghai Sine / Shanghai Pharma)	57.7	+3%	+4%
5 Zhong Chang Sheng (Northeast Pharmaceutical)	32.5	-4%	-3%
6 Golden Bifid (Shenyang No. 1 Pharma / Inner Mongolia Shuangqi)	31.4	-1%	+6%
7 A Tailong (Qingdao EastSea)	23.1	+0%	+3%
8 Hayeo No. 4 Weibao (Hayeo No. 6 / Harbin Pharmaceutical Group)	22.2	+5%	+7%
9 Ju Ke (Mei Tong)	15.0	+9%	+11%
10 Changlu (Suzhou Group / Shenzhen Jointcare)	11.9	+2%	+2%
Others	140.2	+6%	+7%



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Germany | Laxatives

In the modest psyllium segment – where some pure psyllium options are registered as foods rather than supplements or OTCs – results were mixed; leading OTC-registered option **Mucofalk** dominates, but saw sales decline

Food-registered options like **Doppelherz Aktiv** and **Doppelherz Pure** (Quinson), **Dr. Groß Flohsamenschalen** (Dr. Groß, \$0.5mn, +47%) and **Avitalle Flohsamenschalen** (Avitalle; \$0.5mn, +6%) advanced organically to outperform OTCs such as **Mucofalk** and **Cooper's Agiolax** (\$0.8mn, -1%)

However, Apomedica's supplement-registered **Dr. Böhm Darm Aktiv** (\$0.7mn, +159%) was a standout, more than doubling its sales since launch in September 2024; the fruit-flavour soluble sachets (five plant-based fibres [incl. psyllium husk powder], caraway, magnesium, biotin) are claimed to stimulate intestinal activity and promote gentle bowel movements

Brand benefited from trade A+P boasting "The solution for hard stools"

Demand here may have been boosted by increasing use of GLP-1 agonists and the "fibermaxxing" social media trend, both likely to be key drivers of the bulk-forming segment in the coming years

After growing strongly to No. 2 in the bulk-forming segment, **Kijimea Regularis** (Sylflormulas / Futur; methyl cellulose) dipped in 2025, despite 2023 launch of Plus version (with added psyllium)

Following Mafagna's establishment of a consumer healthcare division in Germany in March 2025, the marketer rolled out **Onilgel** laxative, available as Macrogol 4000 powder (medical device; for constipation) and Fiber plum-flavour soluble sachets (supplement; psyllium, lactase, alpha-galactosidase; to support digestion)

Among limited other NPD activity, the wide SOS range was extended with **SOS Verstopfung** (Disticon / Windstari glycerin suppositories at end 2025)

Germany laxatives sales by segment 2025 (MSP, \$mn)

Stimulants 25% (12.9%, CAGR -0.2%)

Demulcents 75% (44.0%, CAGR +3.2%)

Bulk-forming 5% (12.0%, CAGR 1.9%)




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Brand Case Studies | Iberogast

Iberogast sales 2021-25 (MSP, \$mn)

2021: 121.1 | 2022: 133.2 (+10.0%) | 2023: 104.1 (-21.8%) | 2024: 145.9 (+40.1%) | 2025: 180.8 (+24.0%)

CAGR 2021-25: +10.3%

Includes retail sales via stores, plus internet & mail order sales; growth rates are % change on previous 12 months

Key facts


- Originally developed in Germany more than 60 years ago, Iberogast has become one of the world's leading herbal digestive remedies and remains a flagship brand within Bayer's global GI portfolio
- The brand differentiates itself through its multi-herb formulation, which is positioned to restore normal digestive function and address a broad range of GI symptoms rather than targeting a single cause
- Marketing consistently emphasises Iberogast's science-led heritage, with messaging highlighting decades of clinical research and the brand's positioning as being "Powered by Nature, Rooted in Science"

Bayer significantly expanded Iberogast's geographic reach in 2024 through a major US launch, introducing the brand in liquid drops and softgel formats, the latter specifically developed in response to US consumer demand for convenient, on-the-go digestive options

Iberogast is positioned as a multifunctional digestive remedy, with claims spanning indigestion, bloating, fullness, heartburn, nausea, abdominal discomfort, constipation and diarrhoea, allowing it to compete with brands across multiple GI categories

Recent advertising and promotion have focused heavily on digital and educational messaging, with Bayer using consumer websites, social media and HCP engagement to build awareness of the long-established European brand among new consumers; social media posts showcase the CEO interviewing scientists to uncover the science behind the products

TV ads in USA focus on the brand's fast-acting liquid format and natural, science-backed credentials, positioning the brand as a solution for digestive discomfort, bloating and constipation



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Categories covered in this report include:

Antacids • Antiflatulents
Laxatives • Antidiarrhoeals
Oral rehydration treatments
Antinauseants • Digestive enzymes
Liver & bile remedies
Antispasmodics & IBS remedies
Traditional digestive remedies
Other GIs • Probiotics†

† sales tracked under VMS in **DB6**

10 individual markets profiled in depth:

Brazil • China • France
Germany • India • Italy • Japan
Mexico • UK • USA

Plus additional markets in brief:

Canada • Poland • Russia
South Korea • Spain

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The report features the latest end-2025 sales data from our dedicated **DB6** database, including topline historical sales globally, by country and category, as well as individual brand performances, and long-term forecasts to 2030 and 2035.

Diving into the factors affecting the **Gastrointestinals & Probiotics** markets, from consumer trends and regulatory changes to A+P campaigns and new product launch activity, this report sheds light on trends & developments across **10 in-depth country profiles** with insights and predictions, as well as **shorter profiles of other key markets.**



PRICING OPTIONS	LIST PRICE
GLOBAL LICENCE	GB£17,500
SITE LICENCE	GB£13,900