

# GASTROINTESTINALS & HEALTH THROUGH DIGESTION

## Gastrointestinals, Probiotics & the Evolving Market for Health Through Digestion

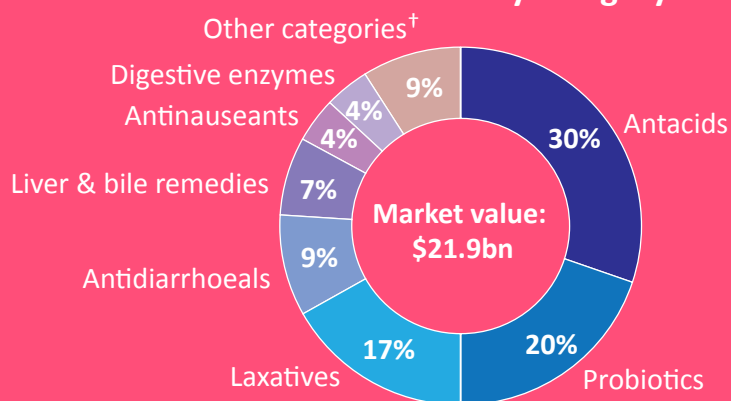
### KEY FEATURES OF THIS REPORT:

- An in-depth exploration of the **GIs** and **Probiotics** market globally, including **Antacids, Laxatives, Antidiarrhoeals, Liver & bile remedies, Digestive enzymes, Probiotics** and more
- **Coverage of 10 major markets** from around the world, with topline sales, brand performances, new developments, launches and promotional campaigns PLUS **mini-profiles of additional markets**
- Very latest **mid-year 2020 sales** from **DB6**, our dedicated CHC sales database, plus historical growth rates back to 2015
- **Case studies of key brands**, highlighting strategies and success factors, sales, NPD activity and consumer & HCP promotion
- **Forecast sales to 2020 & 2021** for all categories and countries, plus longer-term predictions to **2024 & 2029**

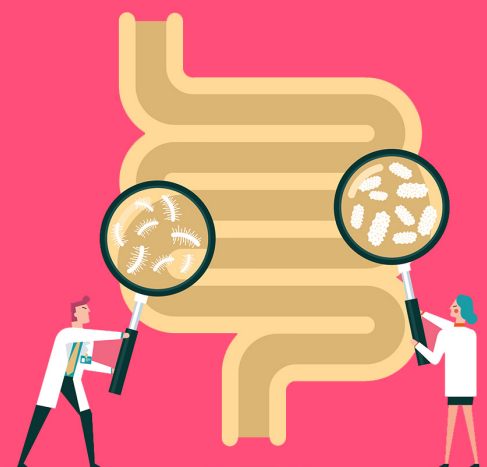
The global market for **Gastrointestinals** plus **Probiotics** expanded by 3.6% in the 12 months to mid-2020 to nearly \$22bn; it is set to be worth over \$33bn by 2029. It is being driven by modern lifestyles (often characterised by irregular unhealthy eating patterns and increased alcohol intake), rising consumer understanding of digestive conditions, limited but important launch activity, and wider acceptance of the health benefits of probiotics. Holding back growth are ingredient restrictions in selected markets and categories, brands facing competition from private labels & generics, and a lack of innovation in certain mature categories.

**Health Through Digestion** is one of the hottest topics in consumer healthcare. The gut microbiome is of central importance in maintaining the body's natural defences and boosting overall wellness. A host of products, primarily probiotics, prebiotics and synbiotics, offer gut health-related benefits beyond digestion such as immunity, weight management, mood & stress, skin health, and more. Ongoing research into the gut-brain axis (the biochemical signal between GI tract and central nervous system) casts fresh light on the expanding role of gut flora in health.

### Global GIs & Probiotics sales by category mid-2020



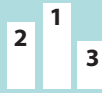
<sup>†</sup> comprises Antispasmodics & IBS remedies (3%), Antiflatulents (3%), Traditional digestive remedies (1%) and Other GIs (3%)



## Key questions investigated in this report



How do markets differ in terms of growth drivers, regulations and competitive landscape?



Which marketers and brands are performing best and what can be learned from their success?



What are the best examples of recent NPD and which developments will help expand the market in future?



How have sales been affected by the Covid-19 pandemic?



What are the latest findings related to Health through digestion?



Do gaps in the market still exist and who is best placed to seize future opportunities?

Covering all the issues affecting the **GIs and Probiotics** market, from consumer trends and regulatory changes to A+P campaigns and new product launch activity, this report spans **10 in-depth country profiles** (generating over 70% of global sales between them) with insights and predictions, plus **mini-profiles of additional markets**.

**New product developments** are explored across markets, including Rx-to-OTC switches, delivery format innovations, line extensions, new benefits and more.

As part of the global overview, this report digs into the latest trends & developments in **Health through digestion**, including food intolerance and adult & infant nutrition.

### Categories covered in this report

Antacids • Antiflatulents • Laxatives • Antidiarrhoeals • Antinauseants • Digestive enzymes  
Liver & bile remedies • Antispasmodics & IBS remedies • Traditional digestive remedies† • Other GI† • Probiotics  
*†selected markets only*

**Brand case studies** evaluate the key lessons to be learned from top brands, including consumer messaging, line extensions, portfolio development and brand strategies.

The report features the **latest sales data** from our dedicated **DB6** database, including topline historical sales by region, country and category, and individual brand performances. Sales cover **12 months to mid-year 2020** (and mid-2019), plus historical growth rates back to 2015. The latest **short-term forecasts** to 2020 & 2021 and **longer-term forecasts** to 2024 & 2029 for each market and category are included.

**Segmentation of sales** in selected categories, including antacids, laxatives and probiotics, helps give a more detailed picture of each market.

### 10 individual markets covered



Brazil



China



France



Germany



India



Italy



Japan



Mexico



Russia



USA

PLUS coverage of selected additional markets in brief

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