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 & 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** – including Gaviscon, Pedialyte and Tums – 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**

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Gastrointestinals & Health Through Digestion

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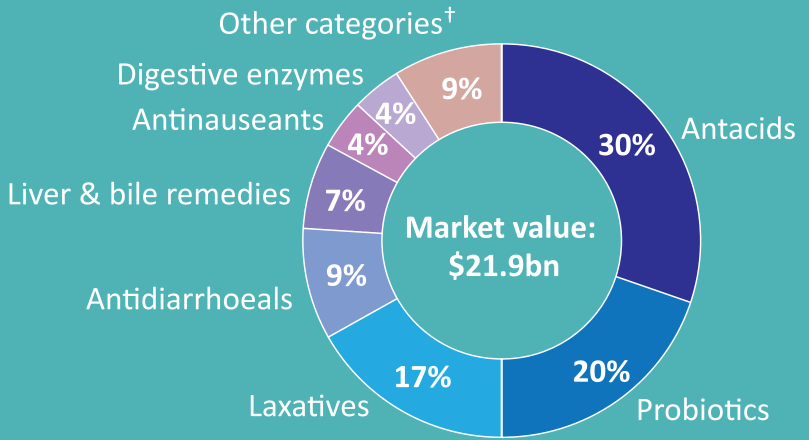
The global market for **Gastrointestinals** plus **Probiotics** expanded by 3.6% in the 12 months to mid-2020 to nearly $22bn; it is set to be worth over $33bn by 2029. It is being driven by modern lifestyles (often characterised by irregular unhealthy eating patterns and increased alcohol intake), rising 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, 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.

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?
- How have sales been affected by the Covid-19 pandemic?
- What are the latest findings related to Health Through Digestion?
- What are the best examples of recent NPD and which developments will help expand the market in future?
- Do gaps in the market still exist and who is best placed to seize future opportunities?

Global GIs & Probiotics sales by category mid-2020



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

Categories covered in this report

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

†selected markets only

10 individual markets covered

Brazil · China · France · Germany · India · Italy · Japan · Mexico · Russia · USA

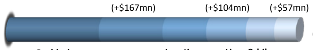
PLUS coverage of selected additional markets in brief: Canada, Poland, S Korea, UK

Gastrointestinals & Health Through Digestion

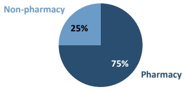
Executive Summary – Global overview

- Growth in GIs & probiotics market added $760mn in net additional sales in year to mid-2020, over half added by probiotics and antacids, with laxatives and antidiarrhoeals also significant contributors

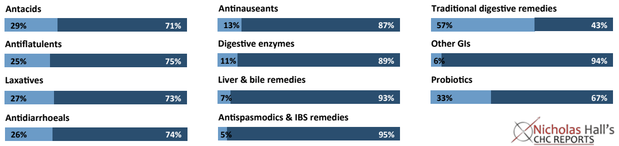
Net contribution of categories to global GIs & probiotics growth mid-2020 (*MSP, $mn*)



Global GIs & probiotics sales by pharmacy / non-pharmacy channel 2019 (*MSP, $mn*)



- GIs & probiotics brands generate vast majority of sales via pharmacy (75%), the primary channel in most markets worldwide; the notable exception is largest market USA, where mass market is most significant channel
- A decent proportion of common GI ingredients are restricted to pharmacy-only sale (or pharmacist-only where this class exists) in markets worldwide but particularly in Europe



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Germany – Digestive enzymes

- Pankreatin 40,000 version spelled differently to distinguish from other options, website calls it "Pankreatan with an i: Pankreatin 40,000 Nordmark"
- Leading lactase-based brands, **Lactrase** and **Lactostop** both hit hard by increasing availability of lactose-free foods

Germany leading digestive enzymes mid-2020 (*MSP, $mn*)

	Brand	mid-2020	mid-20/ mid-19	CAGR 19/15
1	**Kreon** (Viatris)	27.8	+6%	-1%
2	**Pangrol** (Berlin-Chemie / Menarini)	16.8	+13%	+5%
3	**Pankreatan** (Nordmark)	8.2	+74%	+68%
4	**Panzytrat** (Abbvie)	7.4	-27%	+3%
5	**Lactrase** (Pro Natura)	3.6	-9%	-8%
6	**Daosin** (Stada)	2.4	+9%	+4%
7	**Pankreatin Mikro Ratiopharm** (Ratiopharm / Teva)	1.4	-11%	+0%
8	**Nortase** (Repha)	1.2	+10%	+14%
9	**Enzym-Lefax** (Bayer)	1.2	-11%	-11%
10	**Fructaid** (Pro Natura)	1.2	+3%	n/a
11	**Ozym** (Trommsdorff / Dermapharm)	1.2	-9%	-11%
12	**Lactostop** (Hübner / Dermapharm)	1.0	-16%	-24%
	Others	5.7	-3%	-9%

- **Daosin** (amine oxidase) for histamine intolerance grew well; Stada also fields **Fructosin** (xylose isomerase) for fructose intolerance, launched October 2018, with digestive enzyme portfolio united under website alles-essen.de (Eat Everything)
- Also for fructose intolerance, **Fructaid** (launched in 2016) is backed by A+P and website aimed at raising awareness (with stat that 30% of Germans suffer from the condition), while Aixswiss launched **Fructoflor** in October 2019
- **Gluteostop** (Chrisana / Ineo) for gluten intolerance launched in June 2018, claiming to help break down gluten in food more easily (when accompanied by low gluten diet)

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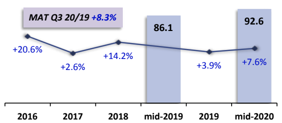
Russia – Antispasmodics & IBS remedies

Russia antispasmodics & IBS remedies sales mid-2019 & mid-2020 (*MSP, $mn*)



Topline trends: Antispasmodics & IBS remedies

- Category posted solid value growth, although much of this was inflationary
- Majority of brands are positioned for women, either for IBS symptoms or menstrual cramps
- No-Spa is the clear category leader, thanks to established heritage (maintained by frequent consumer promotion); however, brand sales have been hit by generic drotaverine competition in recent years

- Drotaverine-formulated **No-Spa** leads the category; brand is available as core (40mg) and high-strength Forte version (80mg), with the latter reportedly cannibalising the former in 2019-20
- Both were seen in TV ads stressing their gentle action to relieve spasms, while No-Spa Forte was focus of a series of TV and online ads in 2020, claiming it relieves abdominal pain caused by a range of factors, e.g. eating fast food, stress
- In January 2018 No-Spa packaging was revamped, while the marketer offered a free Garnier facemask (L'Oréal) with the purchase of core No-Spa in April 2018

TV ads for No-Spa Forte show a woman looking at her laptop and something stressful giving her abdominal pain

- Meanwhile, No-Spa Forte was extended in early 2019 with a 10-count pack, joining the 24-count size that had been widely unavailable, but has since returned to shelves

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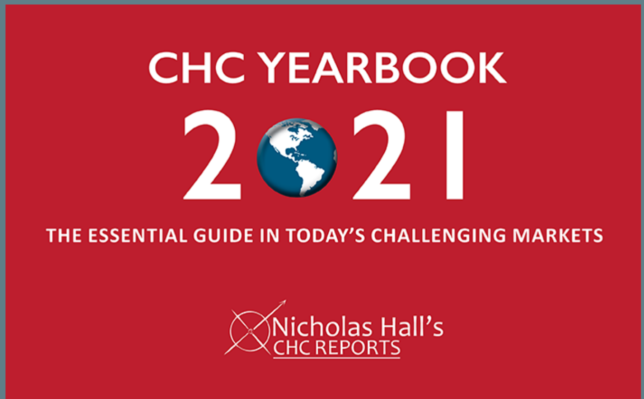

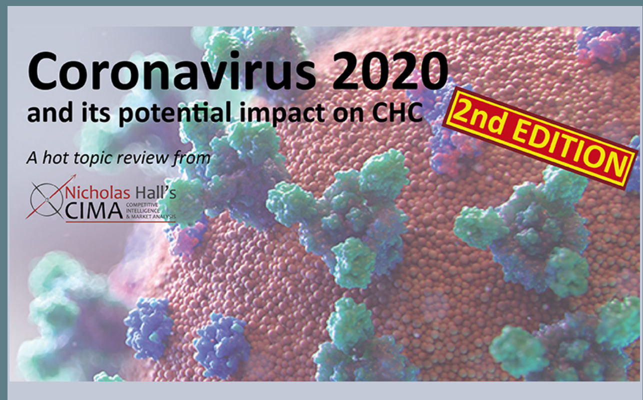

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