



2nd Edition

# Digestive Health, Immunity, and Probiotics: U.S. Market Analysis and Opportunities

To Be Published 4th Quarter 2019

Base Year: 2019

Forecasts to 2024

## Regional Coverage: United States

A comprehensive assessment of the quickly growing market for digestive immune health products. This report will focus on both mass and specialty brands, as well as refrigerated products through all retail channels. This study will provide insights on market trends, growth rates, the competitive landscape, and consumer attitudes and usage of digestive health products.

## This Report is Designed to:

- Provide subscribers with an understanding of the size of the U.S. digestive immunity market through all retail outlets
- Understand the relative size of mass brands compared with specialty brands, refrigerated brands, digestive enzymes, and the like
- Gain insights on key trends, growth rates, and new products
- Assess digestive health and immunity product claims
- Analyze the competitive landscape and provide market shares for major companies
- Forecast sales and market share expectations for these products in the future
- Understand consumer attitudes, usage, and perceptions of digestive health products



# Tentative Report Contents\*

## Introduction

### Executive Summary

- Market overview and trends
- Key lessons learned
  - Category segmentation (of those shown in Table 1) including sales and growth of major brands and market segments
- Notable new products and claims
  - Competitive landscape in 2018 and 2019 including sales, market share, and growth of major companies
- Outlook and appraisal to 2024

### Category Profiles

For each of the categories listed in Table 1, the following information will be provided:

- Market trends
- New products activity
- Product claims
- Sales by brand and company in 2018 and 2019
- Retail distribution
- Marketing analysis
- Outlook to 2024



### Company Profiles

For each of the companies listed in Table 2, the following information will be provided:

- Overview
- Digestive immunity brands
- Merger/acquisition activity
- Sales of key digestive immunity brands in 2018 and 2019
- New products and claims
- Marketing strategies and focus
- Retail channels
- Outlook to 2024

### Consumer Perceptions

This chapter includes results from a consumer survey that assesses consumer attitudes, usage, perceptions, and shopping behavior pertinent to the digestive health category and provides a thorough understanding of the following:

- Demographics of digestive health product purchasers and users
- Retail channels, frequency of purchase/use
- Average price points paid for digestive health products
- Use of traditional OTC digestive medicines, probiotics, prebiotics, probiotic beverages, and digestive enzymes, relative to each other
- Views on consumer perceptions of efficacy and satisfaction with digestive health products

\* Subject to charter subscriber input



**Table 1: Digestive Health Categories Analyzed**

Digestive enzymes  
Probiotics-a  
Probiotic beverages

a- Includes combination prebiotic/probiotic products.



**Table 2: Digestive Health Categories Analyzed**

Company	Key brands
America's Naturals	Family Flora
Bayer Group	Philips', One-A-Day TruBiotics
Biocodex	Florastor
BioGaia	BioGaia
Carlyle Group	Nature's Bounty, Sundown Naturals
Church & Dwight	Accuflora, Nutrition Now PB8
Clarion Brands	Florajen
Clorox Company	Renew Life, Digestive Smart, PARAzyme
Enzymatic Therapy	Enzymatic Therapy Pearls
Enzymedica	Enzymedica
Jarrow Formulas	Jarrow Formulas
Nature's Way	Fortify, Primadophilus
Nestle	Doctor Formulated, Raw, Garden of Life, Primal Defense
Otsuka	Nature Made Digestive Health Probiotics
Procter & Gamble	Align, Metabiotic
Rainbow Light	ProbioActive, Probiolicious, Rainbow Light Advanced Enzyme System
Reckitt Benckiser	Schiff Digestive Advantage
Royal DSM (iHealth)	Culturelle, UP4 A Happier Inside
Unilever	Olly

## Scope

**Digestive Health, Immunity, and Probiotics: U.S. Market Analysis and Opportunities** aims to understand the market for digestive health products and provides market sales, growth, analysis of the most important retail channels, and sales and growth of major competitors in this space. This report focuses on both mass and specialty brands, as well as refrigerated products through all retail channels. It explores consumer perceptions and pinpoints opportunities for marketers. The sample of our consumer study consists of U.S. adults representative of the general population with region, gender, age, and income levels representative of U.S. Census data. The geographic scope is the United States. This study will focus on products that are marketed for digestive immunity and health and includes:

- Digestive enzymes
- Probiotics
- Probiotic beverages

Digestive products covered in this study encompass a wide array of product forms and include tablets/caplets, capsules, sachets, drinks, tea, and juices. Foods that include probiotic additives and ingredients like yogurt are excluded.

## Key Benefits

This study will provide subscribers with accurate and current information and insights on the large and quickly growing digestive health and immunity market, profiles of major competitors in this market, and extensive research to understand the market's size and how fast it is growing, as well as the retail landscape for these brands. Specifically, this report is designed to provide subscribers with a comprehensive assessment of the following:

- An understanding of the size of the leading brands and companies
- Learn about product claims and ingredients
- Gain insights on key trends, growth rates, and new products
- Understand consumer attitudes, usage and perceptions of digestive health products
- Understand the retail environment and the most important channels in this market
- Forecast sales and market share expectations for these products in the future
- Companies in this market, and brands that are potential acquisition targets



## Methodology

Kline's approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 50-plus years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives.

### Primary Research



#### We Know Who to Talk to. We Know How to Listen.

A high number of in-depth discussions are conducted by each analyst. All interviews are done with true industry insiders.

- Marketers
- Retailers
- Trade associations and trade press

This study includes extensive research with approximately 500 U.S. adult consumers to understand who, where, why, and how often consumers use digestive health products. In addition to consumer surveys, our business to business interviews engage experts across all pertinent fields and sectors including:

### Secondary Research



#### We Know Where to Look – Mining the Details.

Analysis is further supplemented by secondary research, consisting of constant tracking of relevant websites, annual company reports, national statistics bureaus, trade/industrial/professional associations, and the like.

Relevant developments are diligently followed and their impact closely monitored. Reports also draw upon non-confidential data from Kline's internal database, consisting of over half a century's syndicated research.

### Comprehensive Market Intelligence



#### We Know How to Verify.

Data are rigorously analyzed, cross-checked, distilled, and validated. Kline's proven methodology allows exceptionally effective, precise, and reliable market

intelligence, giving subscribers a solid foundation on which to grow, refine, and expand their business with confidence.

## Kline Credentials

Kline is a leading global management consulting and market research firm offering the complete spectrum of services. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer products industries for over 50 years.

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