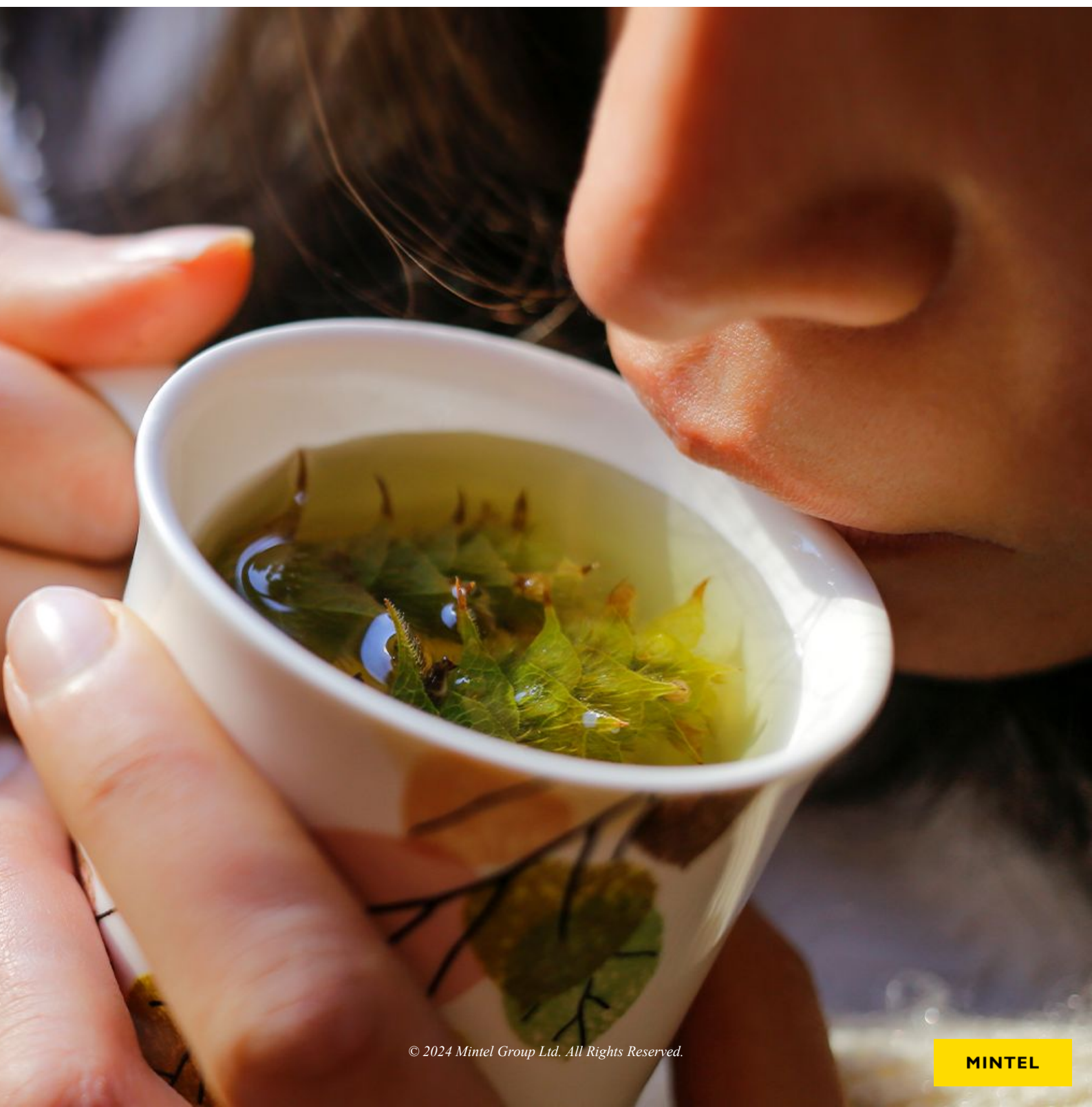


DIGESTIVE HEALTH – GERMANY – 2023

Brands can support consumers' digestive health with convenient ailment solutions and encourage lifestyle changes for holistic health.



Hannah Sandow, Health
& Wellbeing Principal
Analyst, Germany



Digestive Health - Germany - 2023

This report looks at the following areas:

- The short-, medium- and long-term impact of inflation and supply chain issues on the digestive health market
- Experience of digestive issues, such as bloating and heartburn, and purchase of digestive remedies
- In-store and online purchase channels with pharmacies leading the ranking
- Interest in and usage of digestive products, including food or vitamins with digestive benefits
- Perceived benefits of good digestive health, like immune health or improved mood
- Behaviours and attitudes towards digestive health, including the importance of digestive health and consumers' lifestyle habits



Brands can support consumers' digestive health with convenient ailment solutions and encourage lifestyle changes for holistic health.

Overview

The **cost-of-living crisis inflicts significant stress on consumers**; **67% of Germans** expect rising prices to have a strong or slightly negative impact on their finances. In turn, **stress is known to impact digestive health**, which will push the share of Germans experiencing digestive issues (**72%**) to new highs.

Despite heightening demand, financial concerns will prompt some consumers to reevaluate their spending on digestive health in favour of lifestyle changes or private-label products. **18% of Germans** spent less on healthcare products in 2022 than in 2021; **50% of these consumers** have cut back on the amount they buy and 25% buy cheaper versions.

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Currently, **51% of Germans** with digestive issues buy digestive remedies and **32%** have made lifestyle changes to maintain or improve their digestive health. While **64% of Germans** say maintaining/improving their digestive health is important to them, the gap between actions and attitudes towards gut health shows further potential for digestive wellness products.

During an income squeeze, **multifunctionality offers brands an opportunity to deliver value for money** and will resonate with Germans' interest in vitamins with digestive health benefits (**39%**). In particular, immune health and mental wellbeing claims will appeal to Germans as they navigate their way out of the pandemic and through the cost-of-living crisis.

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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview
- The five year outlook for digestive health

Market context

- The impact of the economy on digestive health
- German consumers hold overly positive attitudes towards their own health

Mintel predicts

- Continued growth after strong market rebound
- Market size and forecast for OTC gastrointestinal medicine
- Positive outlook for OTC gastrointestinal medication

Opportunities

- Appeal to Gen Z with a natural twist on digestive remedies
- Highlight restoring gut-health properties within food and drink
- Prove a product's value with a multifunctional formula
- Guide consumers with accessible professional advice
- Quick download resources

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