



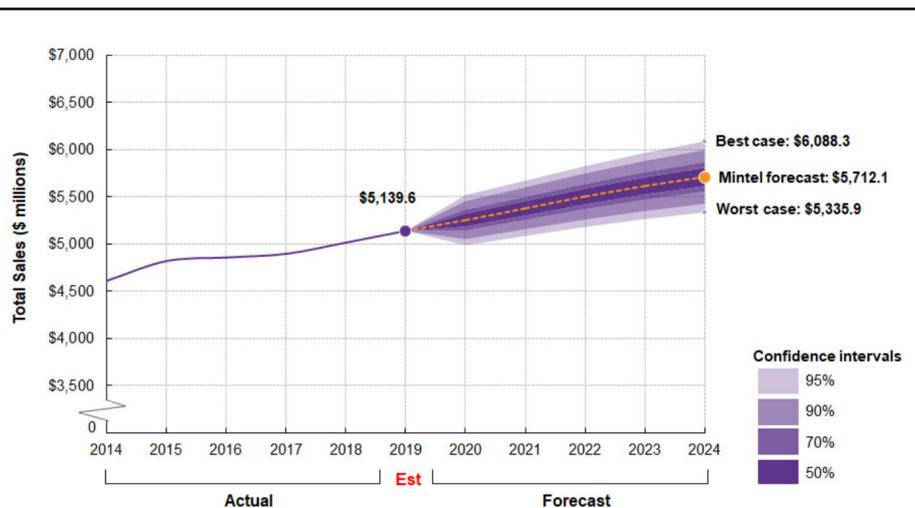
# TREND INSIGHT: Gut Health

Gut health has been said to impact everything from emotional health to the immune system, and nearly half of consumers today believe that a happy, healthy gut is key for overall wellbeing. The digestive health market has shown steady recent growth, with young women identified as a new target demographic and new innovations popping up throughout a variety of market segments. Today, gut health focused products go beyond just yogurt. From probiotic crème filled cookies to boozy kombucha to ancient pasta, let's take a look at some new findings, trends and products we're spotting in this space.

# MARKET BREAKDOWN

Within the last decade, the US digestive health market has nearly tripled in size and is predicted to reach \$5.7B USD by 2024. The market has recovered sales since it's surprisingly stagnant growth in 2016-17, increasing by 2.5% from 2018-19, and reaching an estimated \$5.1B USD at the end of last year.

FIGURE 1: TOTAL US SALES AND FAN CHART FORECAST OF DIGESTIVE HEALTH PRODUCTS, AT CURRENT PRICES, 2014-24



Source: based on IRI InfoScan® Reviews; US Census Bureau, Economic Census/Mintel

Source: Mintel

## PRODUCT FORMATS OF NOTE:

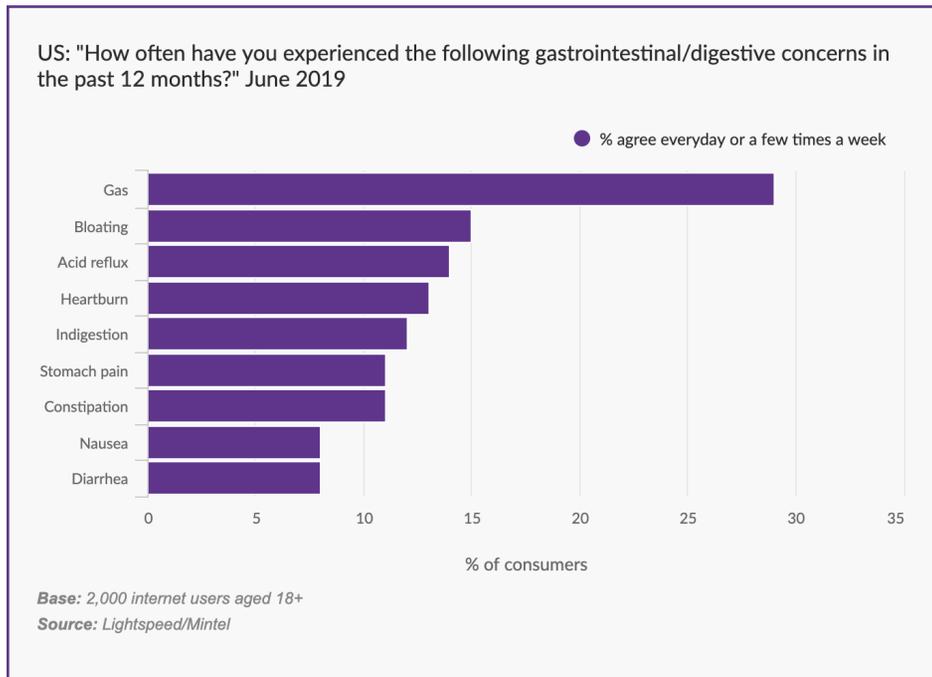
Antacids hold the largest market share (31% of consumers reported using in the last year), while probiotics have lost ground (12% of consumers used in last year). This could be due to consumers' continued pursuit of balanced health: indulge in dulce de leche waffles for breakfast (followed by an antacid); but have some gut-friendly kimchi on a salad at lunch (and skip the probiotic).

Over the counter digestive health remedies will continue to face competition from functional food and drink products with gut health claims as well as consumer's ever-evolving desires for clean, natural, whole-food health solutions. According to Mintel, 30% of consumers have tried food and drinks with probiotic benefits, and 40% are willing to try food and drinks that will aid in their digestive health.

40% OF CONSUMERS ARE WILLING TO TRY FOOD AND DRINKS THAT WILL AID THEIR DIGESTIVE HEALTH

# CONSUMER PERCEPTIONS

Gut health is important to US consumers—48% agree that good digestive health is key for overall wellbeing, and many consumers seek gastric health solutions. According to the International Foundation for Gastrointestinal Disorders, functional gut problems like bloating, constipation and diarrhea account for 40% of all conditions managed by family doctors. While consumers search for products that provide health benefits, the taste is also important. Natural flavors and ingredients may be most desirable as consumers look to “real food” to prevent gastric upset.



Source: Mintel

Consumers are now strategically adjusting their diet to manage gastric upset. In fact, many consumers are even taking a proactive approach to prevent it. 72% of US consumers have tried or are interested in trying prebiotic and/or probiotic supplements, and 27% of US consumers are interested in learning more about probiotics.

Mintel found that 20% of US consumers are interested in a more natural approach, as evidenced by the 57% of adults who have tried food and drinks with high fiber content. In addition, 33% of consumers would be more likely to purchase a food or beverage product if the label indicated it helped balance their digestive system, and 1 in 4 would be more likely to buy a food/beverage product if it optimized their gut health.

“CONSUMERS HAVE TRANSFORMED THEIR APPROACH TO DIGESTIVE HEALTH FROM REACTIVE TO PROACTIVE.”

- MINTEL

# TOP FLAVORS & CLAIMS – GUT-FOCUSED FOOD & DRINK

NEW PRODUCT LAUNCHES, JUNE 2017- JUNE 2020

## FASTEST GROWING FLAVORS - NORTH AMERICA

- Cinnamon ..... +200%
- Raspberry ..... +100%
- Pineapple..... +100%
- Mint..... +100%
- Coconut ..... +100%
- Vanilla/Van. Bourbon/Van. Madagascar +50%

## TOP 10 FLAVORS - NORTH AMERICA

1. Chocolate
2. Herbs/Herbal
3. Vanilla/Vanilla
4. Blueberry
5. Strawberry
6. Berry
7. Ginger
8. Peach
9. Mint
10. Peppermint

## TOP 10 CLAIMS (IN ADDITION TO DIGESTIVE HEALTH) - NORTH AMERICA

1. Low/No/Reduced Allergen
2. Kosher
3. Gluten Free
4. GMO Free
5. Organic
6. Probiotic
7. Ethical - Environmentally Friendly Package
8. Vegan/No Animal Ingredients
9. Ethical - Recycling
10. No Additives/Preservatives

## TOP GROWING CLAIMS - NORTH AMERICA

- Functional: Brain & Nervous System... +500%
- Ease of Use ..... +300%
- Vitamin & Mineral Fortified ..... +300%
- High/Added Fiber ..... +100%

# KEY DEMOGRAPHIC OPPORTUNITY: YOUNG WOMEN

## YOUNG WOMEN AS UNTAPPED TARGET FOR DIGESTIVE HEALTH BRANDS

29% | 39%      15% | 21%      11% | 20%



Gas

Bloating

Constipation

Digestive health symptom regularly\* occurs in the past 12 months, by females 18-34, June 2019

Women aged 18-34 experience higher than average incidence of regular digestive health concerns, yet show low product usage, offering an opportunity for key players to reach an untapped audience. Young women are focused on a wellness lifestyle, prioritizing trending activities, foodie diets and socially-driven brands. To keep up, they expect their necessities to be affordable and seamlessly fit within their daily routine.

● Total ● Female 18-34

Note: \* Regularly (net) = Everyday or a few times a week | Base: 2,000 internet users aged 18+ | Source: Lightspeed/Mintel

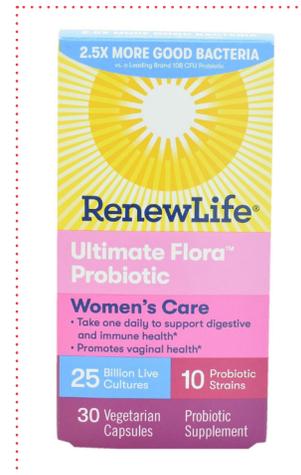
Young women aged 18-34 experience significantly higher amounts of digestive upset and irregularity when compared to the rest of the population. Women are 10% more likely to experience gas, 6% more likely to experience bloating and 9% more likely to suffer from constipation. Mintel discovered that this same demographic shows very low product usage, offering an opportunity for brands to reach a new audience with unique needs.

Source: Mintel

## PRODUCTS OF NOTE:



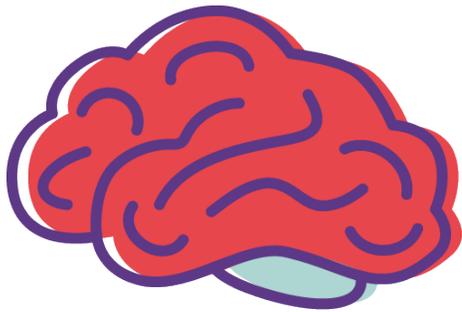
**LOVE SPARKLE FIBER SUPPLEMENT** uses organic ingredients, herbs, probiotics and digestive enzymes, and features body-positive brand positioning.



**RENEW LIFE ULTIMATE FLORA WOMEN'S CARE PROBIOTIC SUPPLEMENT** contains 25 billion live cultures of 10 probiotic strains and is said to support digestive, immune and vaginal health, and help users feel lighter, brighter and more energized.

# GUT + BRAIN HEALTH

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According to Food Dive, nearly 30% of consumers experience digestive upset when under stress, indicating a connection between emotional wellbeing and healthy digestive functioning. Often

referred to as the gut-brain axis, the connection between the brain and gut is biochemically linked—the gut microbiome houses 90% of serotonin receptors and is therefore uniquely connected to mental health.

Studies have found that psychobiotics—products tailored to both mental and gut health—can help people struggling with depression. Though preliminary, these studies illustrate the growth opportunity for creating probiotics with specific health needs in mind; and helps establish the legitimacy of functional mood foods for consumers looking to fortify both body and mind.

## INNOVATIVE PRODUCTS:



**DAILY UPLIFTER POWDER** claims to deliver 4B CFU mood-specific probiotics and 5g of gut-loving prebiotic soluble fiber and prebiotic resistant starch per serving.

*Image Source: Uplift Foods*



**GUT HAPPY COOKIES** are prebiotic cookies filled with a 1B CFU probiotic crème and packed with 14g of fiber.

*Image Source: Uplift Foods*



# GUT HEALTH + IMMUNITY



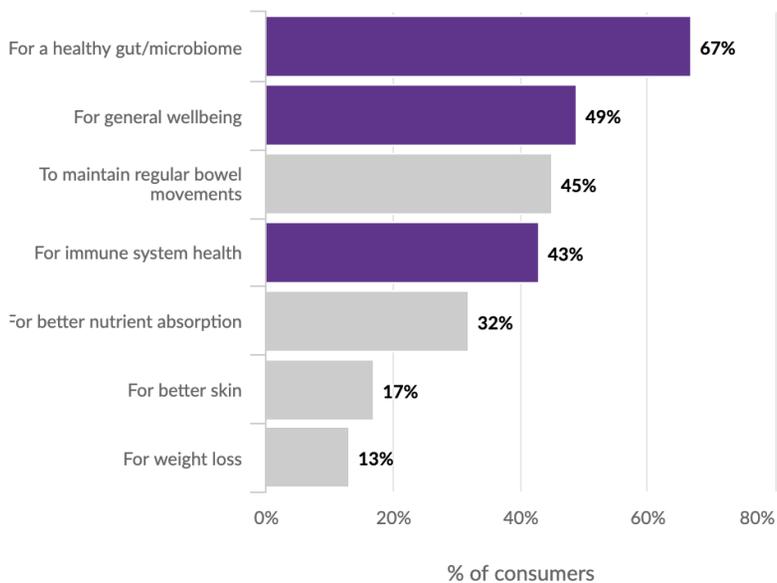
A study published by Frontiers in Pharmacology recently found that generalized probiotic intake could result in 2.2 million fewer antibiotic prescriptions, 54 million fewer sick days annually, and avoid \$919 million in annual productivity losses. And

consumer sentiment aligns—43% of US consumers who take probiotics believe probiotics can boost immunity.

Gut microbiota essentially activate the immune system by stimulating the maturation and functionality of immune cells—any change in gut flora directly influences the immune function and vice-versa. Food and health product developers are looking for new ways to boost this symbiotic relationship and can look to the vitamins, minerals and supplements category for claim encouragement. 36% of probiotic/prebiotic VMS launches from April 2019-April 2020 included immune support claims according to Mintel.

With an increasing consumer focus on health and wellness during the COVID-19 pandemic, these claims are expected to continue. In a tweet posted on June 10, Innova Market Insights shared that probiotic claims are expected to shift more towards immunity in the post COVID-19 world.

US: reasons for taking probiotics, 2018



Source: Mintel GNPD

## INNOVATIVE PRODUCTS:



**REGRAINED HONEY CINNAMON SUPERGRAIN+ IMMUNITY BAR** is made with turmeric and Manuka honey, and contains 5g fiber and prebiotic fiber to support gut health.

# IT'S NOT JUST YOGURT ANYMORE

Over half (51%) of US adults are currently using or are interested in using foods which aid digestion, and while dairy and yogurt products still lead in gut health claims, other categories are gaining new ground. And with innovative flavor and ingredients popping up, consumers are on the hunt for a great tasting product that will also promote good gut health.

## BAKERY AND SNACKS

From bars to cereal to chips, we're spotting new gut-boosting products on the rise.



**EFFI SWEET HEAT PROBIOTIC CHICKPEA GRANOLA** is described as a nutrient-dense, 100% plant-based granola made with chickpeas and probiotics that balance gut microflora and help promote digestive health.



**JICACHIPS SEA SALTED BAKED JICAMA CHIPS** are a natural source of prebiotic fiber, which claims to nourish good bacteria in the digestive system and promote gut health.

**36%** of consumers responded that they likely or definitely would buy this product



## PERFORMANCE NUTRITION

During exercise blood is directed away from the gut to energy-focused muscle tissue, leaving digestive organs at an oxygen and nutrient deficit—this could be why up to 70% of athletes experience some form of gastric upset.

### AMAZING GRASS AMAZING PROTEIN DIGEST TAHITIAN VANILLA FLAVOR



**PLANT BASED PROTEIN** features superfoods to help manage bloat, 5 billion CFU probiotics, and claims to provide soothing digestive support.

**23%** of consumers responded that they likely or definitely would buy this product

# IT'S NOT JUST YOGURT ANYMORE, continued

## BOOZY BEVERAGES

In the US, 29% of Millennials are interested in alcoholic beverages formulated with probiotics.



**LOCAL ROOTS BOOCH-MOSA HARD KOMBUCHA** is brewed with organic orange, ginger, turmeric, and contains probiotics and 6% ABV.

## PASTA

42% of US adults are interested in trying a high-fiber version of pasta.



**PAPA VINCE BUSIATE PASTA** claims to retain the natural bran and wheatgerm through ancient processing techniques, which aid digestion and boost the immune system.

*Image source: PapaVince.com*



# WHAT'S NEXT? POSTBIOTICS

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“Postbiotic” is a newly coined term for the non-viable or “dead” bacteria that could have beneficial biologic activity in the host. Once consumed, postbiotics can produce compounds that could be key regulators of gastrointestinal health and help decrease inflammation and boost immunity. While North American product launches containing postbiotics are scarce, this is a trend to watch.

Mentions of postbiotics on US social media sites have seen a 91% monthly increase from 2018-2019; and while 47% of US consumers agree that the live culture quantity is important when shopping for probiotic supplements, they may need educating about the new concept of “dead bacteria” and its potential benefits.

## INNOVATIVE PRODUCTS:



**NOLA CARAMELIZED STRAWBERRY COOKIES WITH POSTBIOTICS**  
**LACTOBACILLUS** have launched in Indonesia and are formulated with postbiotics to support digestive health.



# THE TAKEAWAYS

*Digestive health has become a priority for consumers and will continue to be an area of focus as more attention is given to immunity and emotional health following COVID-19. Opportunity lies in developing immunity-boosting or mood-enhancing gut health products; as well we products for younger female consumers due to their higher frequency of gastric upset and low adoption of products. No category is off limits for innovation, and whether formulating with pre-, pro-, or postbiotics, we have a gut-feeling that consumers' hunger for great-tasting products that promote digestion is far from satiated.*

## You Deserve More. Let's Get Started.

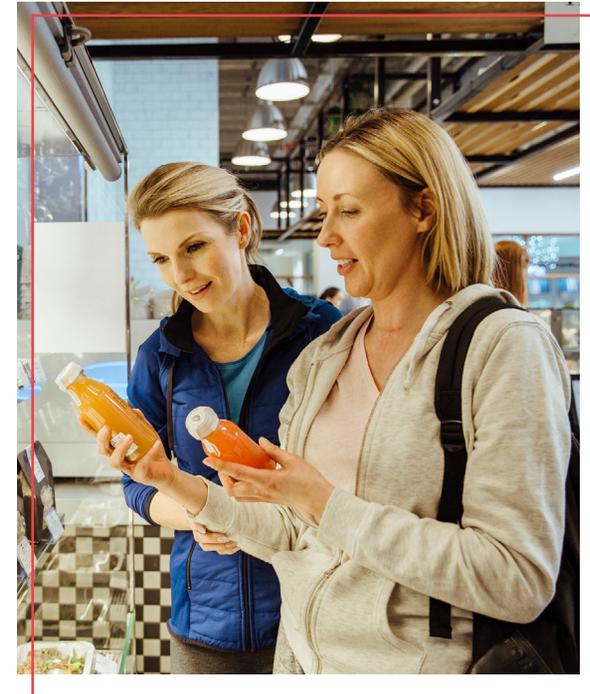
What does true partnership look like? You deserve a flavor partner ready to turn these trends into the tangible.

Let FONA's market insight and research experts get to work for you. Translate these trends into bold new ideas for your brand. Increase market share and get to your "what's next." Our technical flavor and product development experts are also at your service to help meet the labeling and flavor profile needs for your products to capitalize on this consumer trend. Let's mesh the complexities of flavor with your brand development, technical requirements and regulatory needs to deliver a complete taste solution.

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## SOURCES

- Mintel GNPD
- Mintel
- Natural Products Insider
- Food Dive
- Uplift Food
- Twitter



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