



HEALTHY GUT, HEALTHY SELF:

The latest strategies in digestive health

Digestive wellness has been on the health radar for several decades. However, as evidence increasingly shows that gastrointestinal function is critical for both physical and mental health, the concept now lies at the center of a perfect storm of interest in which consumers want personalized solutions for this very personal problem.

It's little wonder. The National Institutes of Health estimates that between 60 and 70 million Americans suffer from some sort of digestive health issue.¹ This is certainly a driver of growth in the digestive health market, which has nearly tripled in size in the past 10 years and is predicted to reach \$5.7 billion by 2024.² Antacids and other over-the-counter remedies have long dominated the category, but more recently consumers are looking to functional foods and beverages that offer natural, whole-food health solutions for gut health.

Nearly half of U.S. consumers now believe that good digestive health is critical for well-being, and about **four in 10** are now willing to try foods and drinks to aid digestive function.³



What's more, according to research from Mintel, consumers are increasingly adopting a more proactive approach to their gut health. More than seven in ten have tried (or show interest in trying) prebiotics or probiotics, and 57% note trying foods and beverages with high fiber content.

According to data from Innova Market Insights, food and beverage launches featuring digestive/gut health claims are on the rise, as consumers indicate fairly well-established understanding of the role that ingredients like fiber, prebiotics and probiotics play in gut health.⁴

This awareness has been bolstered by a growing body of science and subsequent media attention noting the importance of these ingredients for maintaining digestive health and keeping them top-of-mind.

Most recently, a new study from Stanford University suggested that a diet high in fermented foods, such as yogurt, kimchi and fermented vegetables, as well as drinks like kombucha, can enhance microbiome diversity and reduce symptoms of chronic inflammation.⁵

Connecting the dots

Consumers are also starting to make new connections between the gut and other health systems. For example, we now know that the gut-brain axis is what links the brain, emotions and digestive system.⁶ There is also increasing evidence that a healthy gut can support and treat skin disorders,⁷ while new evidence is emerging around the importance of gut health to overall immune function.⁸

This is prompting consumers to look for products that contain ingredients with digestive health benefits. In the beverage category, for example, more than half of U.S. adults (56%) now use products to treat or prevent specific conditions ranging from hydration to weight management.⁹ This recent data from The Hartman Group also notes that consumers are using beverages that provide digestive and related benefits, such as immunity (13%), digestion/microbiome (13%) and weight management (12%). The data also noted that ingredients like fiber/prebiotics and probiotics/digestive enzymes are now sought out by about one in four consumers.

Young women, in particular, may have a higher-than-average need for these products. According to the Mintel data, they are more likely to experience digestive upset and irregularity.¹⁰ That said, they also indicate low usage of products that might help – indicating a key opportunity for brands in this space.

The digestive health opportunity

All this is good news for the digestive health category, which continues to see new product launches and innovation.¹¹ But for brands, approaching this very-fragmented market can be a challenge. The category of digestive wellness is diversifying, according to *New Nutrition Business*' 2021 annual report, "Ten Key Trends in Food, Nutrition and Health." The report suggests that consumers are now demanding more from digestive health products, and that there are nine viable strategies for digestive health products – including use of probiotics and fermentation, products with prebiotics and fiber, plant-based dairy alternatives, and products that are free from lactose, grains or gluten.¹²

The report notes that consumers now know they can choose from these various positions – all of which have scientific backing – to support digestive health. For example, products that are free from ingredients they perceive negatively is a well-understood and important solution in the category. At the same time, adding well-known and beneficial ingredients, such as fiber, prebiotics and probiotics, is another successful strategy.

But as the market develops, it is becoming evident that multiple strategies for one product may now be desirable,

according to the "Ten Key Trends" report. Author Julian Mellentin, editor of *New Nutrition Business*, noted that while a front-and-center digestive health claim used to be enough, today's products should deliver the digestive health benefit while being mindful to address people's many other health interests, such as sugar content, protein and good carbs.

These other areas of interest are likely to continue to expand as evidence provides further links between a healthy gut and other health systems become more established. One example is the rising evidence of the gut-skin axis¹³ and how the diet can support healthy skin and reduce joint inflammation.¹⁴ Analysts at Innova Market Insights also predict that consumers will begin showing a greater interest in gut health with respect to mood, sleep, fatigue and stress reduction.

These developments will likely keep digestive wellness a top-of-mind consideration for consumers and make it an important and challenging atmosphere in product development for some time to come.

Cargill insight and ingredients can help you develop successful strategies to target digestive health.

To learn more, contact us at 1-800-932-0544 or customerservice@cargill.com.

¹ U.S. Department of Health and Human Services, NIH National Institutes of Diabetes and Digestive and Kidney Diseases. "Digestive Disease Statistics for the United States." <https://www.niddk.nih.gov/health-information/health-statistics/digestive-diseases>

² Mintel data presented in "Trend Insight: Gut Health Report," from FONA International. July 6, 2020. <https://www.fona.com/0720guthealth/>

³ FONA International report. "Trend Insight: Gut Health Report." July 6, 2020. <https://www.fona.com/0720guthealth/>

⁴ Innova Market Insights. "Digestive Health Gains Ground in New Product Development." September 26, 2019. <https://www.innovamarketinsights.com/press-release/digestive-health-gains-ground-in-new-product-development/>

⁵ *Neuroscience News*. "A Fermented-Food Diet Increases Microbiome Diversity and Lowers Inflammation." July 12, 2021. <https://neurosciencenews.com/fermented-food-microbiome-inflammation-18909/>

⁶ Cryan, JF; et al. "The Microbiota-Gut Brain Axis." *Physiology Review*. 2019. October 1;99(4):1877-2013. <https://pubmed.ncbi.nlm.nih.gov/31460832/>

⁷ Maguire, M; Maguire, G. "The Role of Microbiota, Probiotics and Prebiotics." *Archives of Dermatological Research*. August 2017; 309(6):411-421. <https://pubmed.ncbi.nlm.nih.gov/28631091/>

⁸ Marchesa, JR; et al. "The Gut Microbiota and Host Health: A New Clinical Frontier." *Gut*. 2016 February;65(2):330-339. <https://pubmed.ncbi.nlm.nih.gov/26338727/>

⁹ The Hartman Group. "Functional and Enhanced Beverage Trends." From the Functional Food & Beverage and Supplements Report, 2021. <https://www.hartman-group.com/infographics/332626980/functional-and-enhanced-beverage-trends>

¹⁰ Ibid. Mintel data presented in FONA report.

¹¹ Innova Market Insights. "Digestive Health Gains Ground in New Product Development." September 26, 2019. <https://www.innovamarketinsights.com/press-release/digestive-health-gains-ground-in-new-product-development/>

¹² Mellentin, J. "Ten Key Trends in Food, Nutrition and Health 2021." *New Nutrition Business*. <https://www.new-nutrition.com/>

¹³ Yeon Lee, S; et al. "Microbiome in the Gut-Skin Axis in Atopic Dermatitis." *Allergy, Asthma Immunology Research*. July 2018; 10(4): 354-362. <https://pubmed.ncbi.nlm.nih.gov/29949831/>

¹⁴ Melnik, BC. "Linking Diet to Acne Metabolomics, Inflammation and Comedogenesis: An update." *Clinical, Cosmetic and Investigational Dermatology*. July 2015. 15;8:371-388. <https://pubmed.ncbi.nlm.nih.gov/26203267/>

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