The Changing Future of Consumer Health

**Key Findings:**

- **High Performance Business Study - 2013 Update**
  - Accenture has analyzed the performance of 17 of the largest Consumer Healthcare companies in the world* over a 5 year period including both historical financial performance as well as analyst forecasts
  - The research revealed two High Performers, reflecting the added this year to the research, entered the newly High Performer.

**Key Findings: Consumer Healthcare Industry**

- **The competition in this space has blown wide-open—in part because traditional leaders from the life sciences and consumer goods sectors have opened—in part because traditional leaders from the life sciences and consumer goods sectors have extended into new markets and high potential markets.
- **Focus on high-value categories**
- **Dynamic operating models**
- **Seamless channel experiences**
- **1:1 marketing across all touchpoints**
- **Integrated analytics across the organization**
- **Converging & collaborating to capitalize on the expanding Consumer Healthcare opportunity**
  - High Performers are converging and collaborating to capitalize on the expanding Consumer Healthcare opportunity.

**Companies outside the traditional Consumer Health industry are entering the market to satisfy the untapped needs of the health-oriented consumer.**

- **To win in Consumer Health, consumer goods and life sciences companies will need to re-adapt their businesses to be able to quickly adapt their capabilities to capitalize on this rapidly rising market.**

**Companies enter from mobile, consumer electronics - consumer tech, including Samsung, Nike, and Google, to telecommunications companies like AT&T and Verizon, to tech, including Samsung, Nike, and Google, to telecommunications companies like AT&T and Verizon, to technology companies like Intel and IBM, to food, drinks and tobacco companies like PepsiCo and Philip Morris, to automotive companies like BMW and Ford, to medical devices companies like Johnson & Johnson and Medtronic.**

**The year 2013 marked a high Performance**

- **High Performers recognized the potential of the expanded Consumer Health market and are adapting their strategies to capitalize on it.**

**Consumer Health market is growing by at least 5 percent per year.**

- The in-home diagnostic testing (Pain, Cough/Cold/Stomach Remedies, etc.) market is expected to grow from $29 billion ($235 billion) to $737 billion over the next five years.

**Swisse Wellness**

- P&G acquired Schiff, the global leader in nutritional and dietary supplements, in 2012.
- P&G also acquired BioCare, a European producer of nutritional and dietary supplements, in 2013.
- Procter & Gamble acquired Blackmores, an Australian producer of nutritional and dietary supplements, in 2014.

**Swisse**

- Swisse is a global leader in nutritional and dietary supplements.
- Swisse products are sold in over 40 countries worldwide.
- Swisse products are recommended by doctors, nurses, pharmacists, and nutritionists around the world.

**Forecasted market size**

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