

## Accelerating the future The rise of a dynamic consumer health market

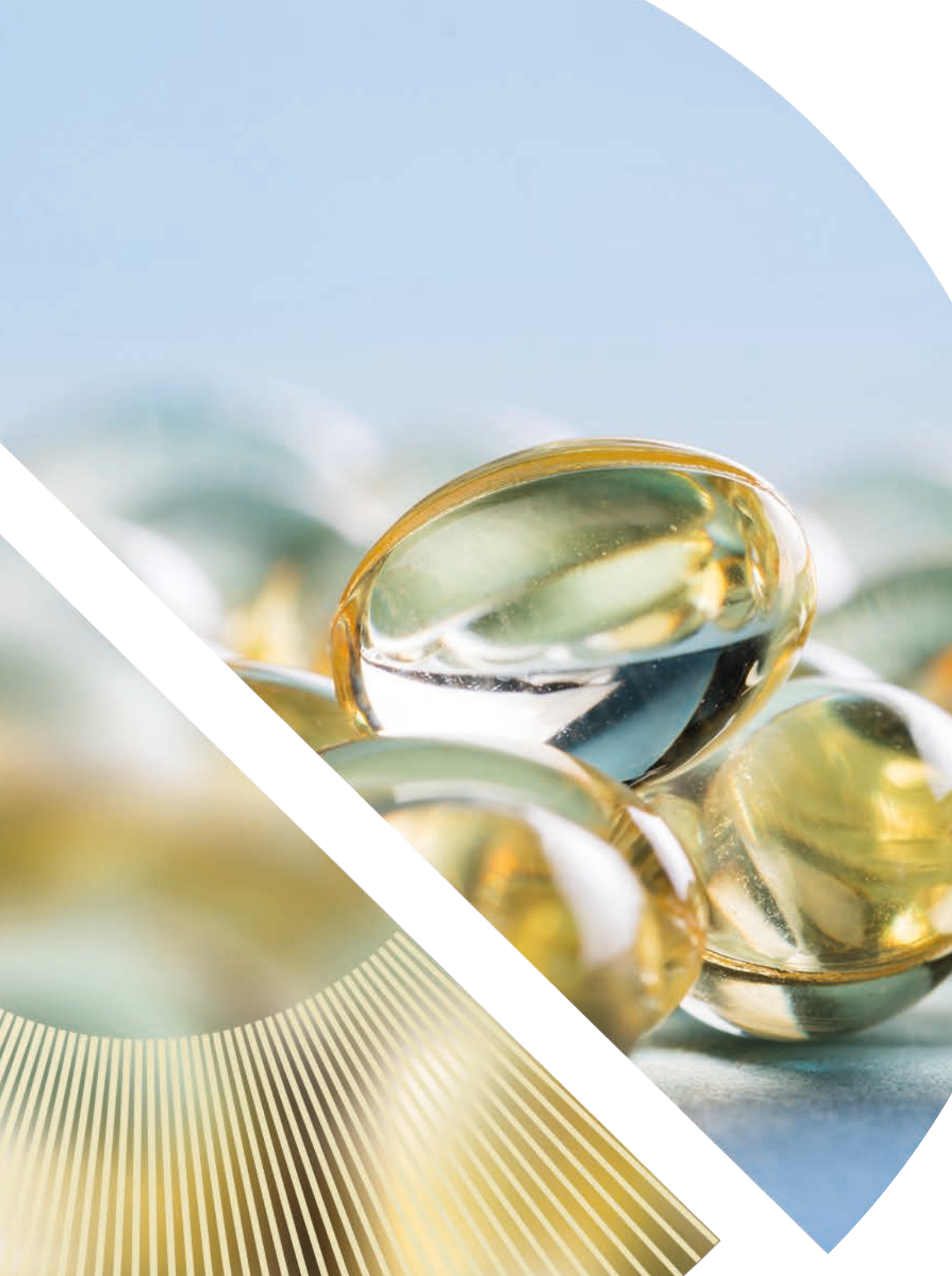
Life sciences and healthcare predictions 2030

# The rise of a dynamic consumer health market

## Responding to consumers expectations and gaining their trust

### Prediction 2030

Following spinoffs and market consolidation, the Consumer Health (CH) industry has become an established branch of the health ecosystem focused on promoting health, preventing disease, treating symptoms and extending healthy longevity. Increased competition from both traditional and non-traditional industries has led to market segmentation aligned to different demographic groups, life stages and events, with CH companies (CHCs) recompensed for products and services that deliver trusted, quantifiable benefits. CHCs use genetic and behavioural data to design more personalised, science-based, consumer health products and services. AI-enabled point-of-care diagnostics, digital self-help tools, biomarker trackers, and FemTech and AgeTech products and services are sold via a range of channels, all aimed at empowering consumers to self-care. Often in partnership with other system players, CHCs have access to huge repositories of data, alongside real-time consumer feedback. They use these data to track outcomes and create a continuous feedback loop to develop ever more innovative, evidence-based, customised products and services. CHCs also use sustainably sourced ingredients and packaging to differentiate themselves and stay ahead of the curve in meeting their ESG commitments.



## The world in 2030

- CHCs use advanced AI-predictive/sensing capabilities to identify potential underserved and untapped parts of the market and develop or acquire products and services to fill gaps in their portfolios.
- AI-enabled consumer portals provide consumers with advice and guidance, digital apps help improve choice and access, and physical stores provide opportunities to explore and experience new products and services.
- CHCs have invested heavily in nutrigenetics to deliver personalised products in response to the evolving health and well-being needs and preferences of consumers, including subscriptions that are easy to set-up and to cancel.
- CHCs have established greater penetration among different populations, including emerging markets, with products that have been adapted for local contexts.
- CHCs have developed personalised products and services that deliver proven benefits across areas such as nutrition, sleep, fitness, and mental well-being.
- A feature of the CH market is customised FemTech and AgeTech products such as: AI-enabled period and pregnancy tracking; sight, hearing and oral health products; vital sign monitoring; and diagnostics.
- Retail chains and pharmacies have refined and expanded their role and range of service offerings, utilising integrated data, tele-pharmacy, and automation, earning high consumer satisfaction ratings.
- Pharmacists are critically important in helping consumers interpret health data, providing advice and identifying suitable products and services.
- The over-the-counter (OTC) industry has moved 'beyond the pill' and increased the scale and coverage of RX to OTC switches.
- Retail and digital channels have embedded considerations of health equity and environmental sustainability in designing consumer products.

## Conquered constraints

### Skills and talent

Joint ventures, partnerships and collaborations use shared digital platforms, enabling CHCs to deploy value exchange as a way of accessing new skills and talent. AI-enabled contact centres and consumer services support consumer-facing staff who are valued for their critical thinking and soft skills. CHCs employ scientists, wellness coaches, digital health and tech designers and pharmacists, to develop evidence-based prevention and longevity-enhancing products. CHCs balance competitive benefits packages for staff with ESG considerations and corporate profitability.

### Funding and business models

New Private Equity and Venture Capital funding and innovative financing and insurance models enable companies that consistently show improved science-based outcomes to prosper. Businesses that address specific needs (such as women's health, hormonal health, or longevity) attract investment.

### Regulation

CH products are categorised in a similar way to MedTech products, with each category regulated in accordance with standards to ensure safety and efficacy and protect consumer privacy. Regulations are in place to reduce/stop the spread of false or exaggerated claims, especially social media advertising, with CHCs investing in their regulatory teams to obtain greater assurance on compliance. They have also embraced science based ESG reporting standards.

### Digitalisation and data

Consumers willingly share their data with CHCs in exchange for trusted personalised products and services. Combining CH data, through secure, cloud-based and interoperable platforms, has strengthened CHCs approach to the security, privacy and ethical use of personal data.



## Imagine the world in 2030\*

### Trust is at the heart of the relationship between consumers and consumer health companies

Amy was born in 1988 and is a typical millennial! The early 2020s were particularly challenging for her as the COVID-19 pandemic affected her career opportunities and mental health. However, a subsequent promotion at work, her wedding and the purchase of a first home helped improve her outlook and stabilised her finances, and by 2030 she was enjoying her prime spending years. As a millennial Amy is fluent in the use of digital technology and has a positive relationship with social media and AI-enabled devices. She considers herself a hyper-informed consumer, and an advocate for self-care. She willingly shares her health data (given assurances that it is fully protected) and understands how its use is delivering value. She also willingly pays a premium for personalised products. On the recommendation of her health insurance company, following disclosure that her family has a history of cardiovascular disease (CVD), Amy had her genetic profile sequenced in 2025. This confirmed that without changes to her lifestyle she had a heightened risk of developing CVD. Her insurer provided a health monitoring device and access to a chatbot that provides advice to help her manage her health. It also provided a discounted subscription to a nutrition company offering personalised food choices, supplements and discounted gym membership. As a result, Amy's health has measurably improved, and she has lowered her risk profile.

### Technological and clinical transformation and personalisation of services have assured retail pharmacy's future

In 2026 Pratik, the strategy director of an ambitious retail pharmacy group, designed a strategy to shift the focus from a convenience-store model to a health destination, and move from reactive treatment to proactive prevention. The strategy included the use of 3D printing technologies to customise products, AI-enabled 'kiosks', telehealth, and drone delivery services. This led to a rapid expansion of the group's consumer base, with a focus on longevity including AgeTech products, digital care plans, home health diagnostic tests, avatars and care bots. Since then, Pratik has seen the strategy result in major advances in the groups' technology capabilities and a willingness to adopt clinical breakthroughs. The automation and democratisation of data has enabled the pharmacy to meet consumer expectations and deliver more equitable, citizen-centric services. A notable change has been an enhanced role for their pharmacists, who are highly trained, trusted medical professionals, but whose skills were previously under-utilised. They now operate at the top of their licence providing personalised care, counselling and advice services, supported by huge data sets, AI-enabled-connected medical devices, cloud-based algorithms and quantum computing to enable real-time diagnosis. Further changes such as e-labelling, augmented reality product information and sustainable packaging have helped boost the commercial value of the group's products.



### Thriving nutrition companies put 'health first'

Even before the pandemic, diverse groups of consumers were experimenting with conscious eating to achieve a range of health and sustainability goals, but the pandemic and a growing understanding of the importance of a healthy immune system accelerated the trend. This rise in awareness of the importance of a strong immune system led consumers to expect more healthy, affordable and sustainably sourced food and beverages, and to seek evidence of food security. During 2025, Yolanda, the CEO of a large nutrition company, ran regular consumer feedback surveys which found that more than 75 percent of people wanted to eat more healthily, with half of them seeing it as a top priority. The feedback also showed that people were confused about which food was healthy and sustainable, and frustrated because retailers and food producers were not keeping up with their search for conscious eating. Her company responded to these challenges by deploying complex algorithms to analyse vast amounts of literature and data, and in 2027 Yolanda launched a 'health first' strategy, pivoting her company's focus to foods that promote metabolic health, with a science-based framework to inform decision-making. The company also acquired several smaller businesses that were personalising health nutrition to grow this market. By 2030 the company had fundamentally changed its food portfolios and re-engineered many products to make them healthy, nutritious, tasty, affordable, and widely available to consumers. It now works closely with local producers and distributors who guarantee a trustworthy sustainable supply chain.

\* Note: All elements on this page are from a perspective of 2030 and are fictional

## Evidence in 2024

### ZOE is transforming our understanding of how food affects the body

**ZOE** is a health science company that combines nutrition science, digital technologies and AI to predict the responses of individuals to food. Their PREDICT clinical trials, in partnership with academic institutions, enable Zoe to determine genetics, metabolic determinants, meal context and composition, and individual characteristics, that affect the response to food. Using this knowledge, they provide insights into the individual's metabolism and gut microbiome and nutritional plans. Through at-home gut health and blood fat tests and blood sugar sensors, consumers can discover their body's response to food and use the ZOE app to make nutritional plans, order food and contact health and wellness coaches.<sup>1</sup>

### Self-Care Wheel to improve sexual health

The **Self-Care Wheel** won the World Health Organization (WHO) internal Director-General's Excellence Award for Innovation 2023. Available in digital and paper-based formats, it uses a simple colour-coded system to show which interventions can be accessed without the support of a healthcare worker. Tested in Bangladesh, India, Morocco and Nigeria in women and girls of reproductive age, and by community health workers and pharmacists, it can expand access to ovulation predictor kits, HIV self-testing, self-managed medical abortion, injectable contraception and self-screening for human papillomavirus.<sup>2</sup>

### The expected growth of OTC medications

**The OTC medicines market** enables patients to access much-needed treatments without prescriptions in a safe, effective and convenient way. The global market size was US\$47bn in 2022 and is expected to grow by 5.8% per year to US\$74bn between 2023 and 2030. There are many companies in this fast-growing industry, with the top five companies collectively holding only 16% of the global (OTC) market, and the top ten just 27%. This market fragmentation suggests the likelihood of industry consolidation.<sup>3</sup>

### CHCs are tailoring their nutritional products to evolving consumers' needs

Consumers increasingly want to build their immunity and maintain a healthy lifestyle, including the use of personalised products.<sup>4</sup> For example, **Nourished** uses 3D printing technology to personalise seven-layer nutrient gummy stacks based on an individual's health and wellness goals. Consumers answer initial questions to assess their lifestyle and nutritional goals and can then choose combinations of products based on this assessment.<sup>5</sup>

**Nestle's** Vital Pursuit is a line of frozen meals targeted at GLP-1 based obesity drugs, aimed at attracting a new category of dieters.<sup>6</sup>

### The expansion of the e-Pharmacy market

**The global e-Pharmacy market** was US\$99bn in 2022 and expected to grow by 14.5% to US\$354bn between 2023 and 2032 due in part to increased internet use.<sup>7</sup> In Europe, Germany has the most mature e-Pharmacy markets, because of a low density of physical pharmacies and a push for lower prices. This highlights access and pricing as two important aspects that will define where care is delivered.<sup>8, 9</sup>

### A rise in consumer health spinoffs

A separation of big pharma from their consumer health arms has been a recent trend, to enable big pharma to focus on their core biopharma and vaccine lines.<sup>10</sup> In 2021, **Merck** announced the completion of its **Organon** spinoff. In 2022, **GSK** announced the completion of the demerger of the CH business from the GSK Group to form the **Haleon Group**.<sup>11</sup> In August 2023 **Kenvue** became a fully independent company following final separation from **Johnson & Johnson**.<sup>12</sup> And in October 2023, **Sanofi** announced the spinoff of its consumer health arm.<sup>13</sup>

### Bringing medical imaging home for earlier diagnosis

Safe use of at-home medical imaging devices, without the need for a clinic, is on the increase. For example, a wearable ultrasound developed by **MIT**, which can be incorporated into a bra, could allow more frequent monitoring of patients at high-risk of breast cancer.<sup>14</sup> A photoacoustic imaging watch allows high-resolution imaging of blood vessels in the skin, for early vascular disease diagnosis and long-term monitoring of blood circulation parameters.<sup>15</sup>

### The pursue of healthier longevity

**The global complementary and alternative medicine for anti-ageing and longevity market** was estimated at US\$63.60bn in 2023 and is expected to grow at a compound annual growth rate (CAGR) of 21.5% from 2024 to 2030. This growth is driven by an ageing population and increasing awareness of holistic well-being.<sup>16</sup>



# Artificial intelligence and the transformative power of GenAI

## The impact on the consumer health industry

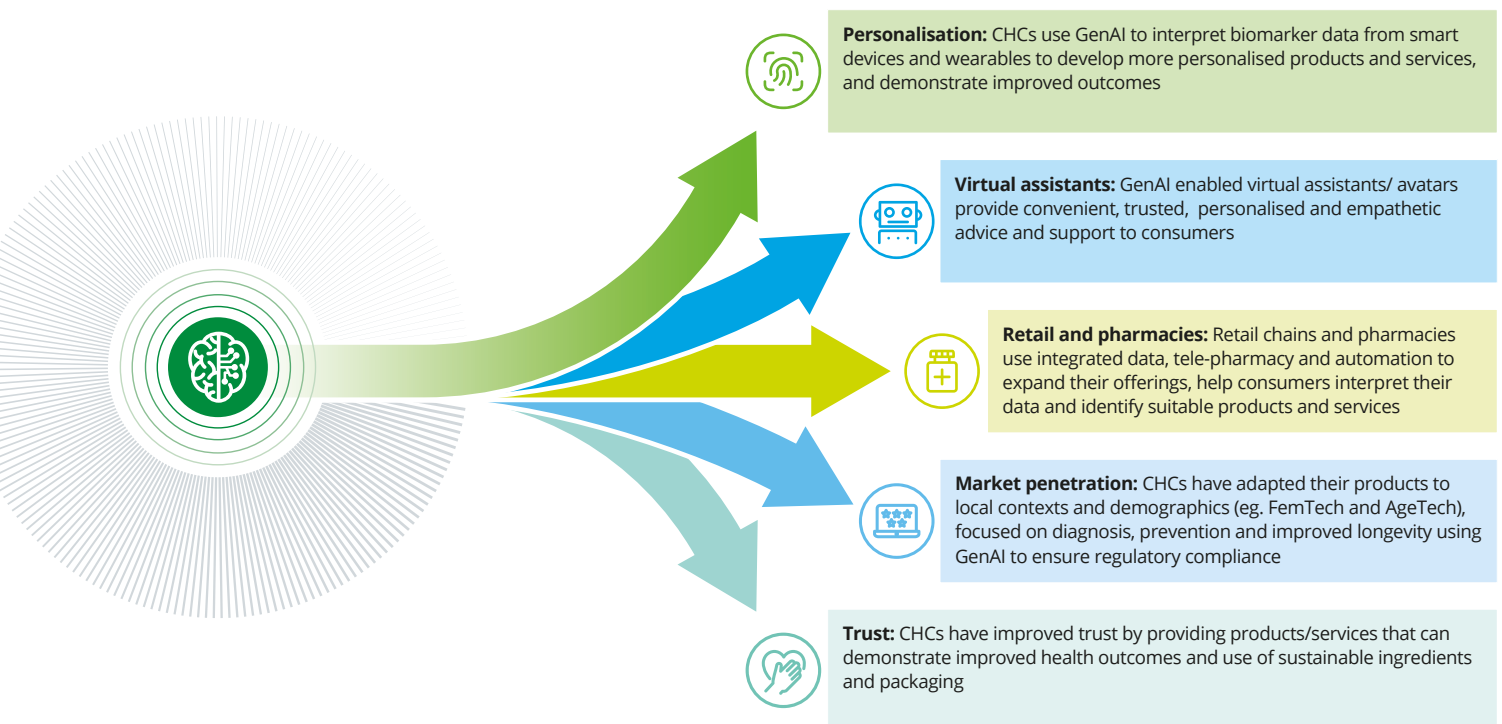
GenAI has the potential to transform CHC's operations (including improved internal efficiencies, personalised product development, sourcing, and improved consumer engagement) but only if consumer trust can be established and sustained. CH companies' path to success requires technological progress, but also alignment of the technology with the values, expectations, and trust of the consumers they cater to. With that commitment, GenAI could become a key ally in the pursuit of better health and well-being outcomes and more cost-effective self-care. More specifically:

- GenAI will enable CHCs to find new and different ingredients and obtain a better understanding of what works in which cultural setting. It will interpret biomarker data from smart devices and wearables to generate personalised products and treatment plans, including individually tailored beauty products;

supplements, vitamins and customised meal plans; behavioural and mental health interventions; sleep, diet and exercise programmes; AI-generated music for stress management; and proven AgeTech and FemTech.

- GenAI will also enable virtual companions to assist consumers, providing real-time support and guidance and improve equitable access to information and advice.
- CHCs can use GenAI to demonstrate improved outcomes that distinguish them from their competitors. GenAI can also monitor regulatory compliance globally, with the best platforms able to analyse and collate competitor and regulatory data and avoid reputational and financial setbacks.
- GenAI can enable CHCs to build consumer trust by implementing a GenAI framework that emphasises transparency, monitoring, and assessment of personal health-related data.

## A number of trends driving the consumer industry's rapid transformation



Source: Deloitte analysis.



## Examples in 2024

**Hume AI** has raised US\$50mn Series B funding to launch the first empathetic voice interface (EVI) optimised for human well-being by using large language models that enable the AI platform to adjust its words and tone of voice according to the user's emotional state. Hume AI capabilities include improved screening and monitoring of health and well-being (e.g., tiredness, anxiety, depression). A beta version of the product has been launched.<sup>17</sup>

The **World Health Organization** has launched its own health platform enabled by GenAI, **S.A.R.A.H.** (Smart AI Resource Assistant for Health), with the aim of helping citizens live healthier lives. Defined as 'a digital health promoter' the platform is available 24/7 in eight languages via video or text and can provide tips on eating, giving up tobacco and e-cigarettes, and managing mental health issues.<sup>18</sup>

The **global FemTech market** is expected to grow from US\$7.75bn in 2024 to US \$29.62bn by 2032, at a CAGR of 18.2%. The market is propelled by the growing demand for feminine hygiene and healthcare. Increasing awareness of women's health issues is expected to drive the market. This industry is leveraging the latest advancements in artificial intelligence, machine learning and big data to address a wide range of women's health issues, from fertility solutions to menstrual tracking, and from pregnancy care to menopause support. AI-powered predictive analytics, for example, are enabling the development of highly customised health solutions, from fertility tracking apps that predict ovulation with remarkable accuracy, to wearable devices that monitor vital signs and alert users to potential health issues.<sup>19</sup>

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