

Global Business Review
Probiotic Cultures
 SUPPLY/DEMAND/FORECASTS
 2021 – 2026

INTRODUCTION	<p>Gut health probiotics have been present in the market for a long time. Ever since the establishment of the therapeutic effects of Lactobacilli in Japan in the 1930s, the market has steadily grown. Covid-19 has brought the health benefits of probiotics back into focus, especially their immune building function. Although claims are not allowed in Europe and the possibility of class actions restricts claims in the US, the perceived immunity message is nevertheless a strong driver for probiotic consumption. Although not studied extensively as a therapy, lactobacilli are known to mediate and reduce the impact of gastrointestinal and respiratory infections in children as well as geriatric patients. Further research on these angles may offer interesting avenues for greater growth of probiotic consumption worldwide.</p> <p>2020 has been an exceptional year and, to clarify these unprecedented business conditions, Giract has split the year into three distinct Covid response phases:</p> <ul style="list-style-type: none"> • January–March: Pre-Covid, the impact of the spread of the infection was being evaluated, little or no bearing on global food and beverage markets • April–September: Control measures in place and slowly lifted with further understanding of the spread of the infection and development of therapies; dramatic shift in consumption patterns, consumer preferences, food service revenues, etc. • October–December: Post-Covid, stabilization when control measures put in place will be standardized and businesses can resume with a greater understanding of the future. <p>This is the right time to study the market for probiotics</p> <p>In its proposed research, Giract will aim to separate out cultures used exclusively for fermentation/preservation from the scope, as with previous editions. Newer applications in the post-Covid era may require new delivery mechanisms and will be explored. As with the previous reports, a focused effort will be made to quantify the bacteria volume in freeze-dried equivalent units – a unique feature in this and previous editions of the study.</p>
OBJECTIVES	<p>To provide a full understanding of the global probiotic cultures market, implying the following sub-objectives:</p> <ul style="list-style-type: none"> • Track production, producers and trade to arrive at availability of the cultures • Differentiate the cultures and applications, while excluding non-probiotic positioning, to arrive at demand in different end-user sectors/regions • Understand pricing by culture and application in the different regions • Elicit responses from market participants and analyse trends derived from various sources • Forecast volumes by culture, sector and region till 2025 based on trends identified
PRODUCTS	Bacilli, Lactobacilli, Bifidobacteria, Lactococcus, Enterococci, Pediococcus, etc.
MARKETS	Chilled dairy, Functional foods & beverages (probiotic fortified beverages), Infant nutrition / baby food, Dietary/food supplements, Pharmaceuticals, Clinical nutrition, Pet food, Animal/aquaculture nutrition
POSITIONING	Gut health, Immune health, Female health, Oral health, Skin health, Infant & child health, Respiratory tract health/infection, Cardiovascular health, Mental health, Sleep health, Dental health, and Performance nutrition
GEOGRAPHIC	N. America (USA/Canada/Mexico); Brazil; Europe (EU27+UK, Norway, Switzerland); China; APAC (India, Indonesia, Malaysia, the Philippines, Singapore, Thailand, Vietnam); ME (Saudi Arabia, United Arab Emirates); RoW (including Russia, Ukraine, Australia, South Korea, Japan, Africa, Other LATAM)
TIMESCALE	Current estimates for 2021; Forecasts to 2026
PUBLICATION	Q3 2021
SUBSCRIPTION	Please contact for subscription details