

Global Business Review  
**Probiotic Cultures**  
 SUPPLY/DEMAND/FORECASTS  
 2023 – 2028

**INTRODUCTION** Covid-19 brought the health benefits of probiotics back into focus, especially their immune building function. Significant work has gone into proving their efficacy in clinical conditions concerning digestion, immunity and a few other medical/health benefits.

The World Gastroenterology Organization (WGO) recently published an updated guideline document, aimed at helping gastroenterologists and other physicians understand appropriate clinical applications for probiotics or prebiotics. The conditions for which probiotics/prebiotics show benefit include some well-known areas: diarrheal conditions, irritable bowel syndrome, inflammatory bowel disease and lactose maldigestion. For infants, infantile colic and necrotizing enterocolitis are included in the list. Yet positive evidence also exists for some conditions that are not often associated with probiotic/prebiotic benefits: insulin resistance, non-alcoholic fatty liver disease, H. pylori infection, and even general health-related quality of life.

Probiotics are also being discovered for managing ageing. A next-generation probiotic bacteria discovered in fermented food from the North East of India has been found to promote longevity and healthy aging. Lactobacillus plantarum JBC5 (LPJBC5), isolated from curd and generally found in fermented milk and vegetable products, qualifies as a probiotic. This probiotic bacterium caused a 27.81% increase in the lifespan of C.elegans and provides evidence for healthy ageing.

Given the rapidly increasing positive consumer reception to probiotics since 2021, the market for probiotic cultures is booming globally. Market players are devoting considerable resources to tap into this potential, for example, ADM recently inaugurated a USD30 million production facility in Valencia, Spain.

In its proposed research, Giract will explore newer applications in the post-Covid era that may require new delivery mechanisms. As with our previous 5 reports covering probiotic cultures, a focused effort will be made to quantify the bacteria volume in freeze-dried equivalent units and split the volumes presented by species and application for proprietary strains. This quantification methodology makes Giract's report to be not only unique but also highly useful at the operational and strategic decision-making processes in this complex business.

**OBJECTIVES** To provide a full understanding of the global probiotic cultures market, implying the following sub-objectives:

- Track production, producers and trade to arrive at availability of the cultures in volume terms
- Differentiate the cultures and applications, while excluding non-probiotic positioning, to arrive at demand in different end-user sectors/regions
- Understand pricing by culture, distribution route 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 2028 based on identified trends

**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 2023; Forecasts to 2028

**SUBSCRIPTION** Please contact us for subscription details