

# Probiotics for Human Health

Supply/Demand/Forecasts

Global with Focus on USA + Canada, Brazil, EU28, India, China, Australia, ASEAN  
2017 - 2022

## INTRODUCTION

Gut health probiotics have had a long presence in the market, and great consumer recall. Ever since the establishment of the therapeutic effects of Lactobacilli in Japan in the 1930's the market has steadily been growing for this application. Over time though, the applications have varied, and innovations today can span oral health to dermal health. Thus, the range of applications include Gut health, Immunity, Female health, Oral health, Dermal health, Infant & child health, Respiratory tract health/infection, Cardiovascular health, Mental health, and Sports nutrition. While most of the article 13 claim applications surrounded gut/intestinal health, there were a few for immune boosting capacity as well as for dermal health. Needless to say, the largest application still remains gut health.

Dairy is an excellent carrier for probiotic cultures. A blurring of boundaries is possible in this application, where cultures used for fermentation of dairy may also act as probiotics. Similarly, in meat applications, where preservation and a probiotic effect may go hand in hand depending on the cultures being used. Giract will aim to separate out cultures used exclusively for fermentation/preservation from the scope of this study. Till date, dairy remains the most popular sector for probiotics cultures, apart from supplement forms. Newer applications require new delivery mechanisms which are currently being explored.

While developed regions have the supply chain capabilities to reach live and viable probiotics to the consumers, in developing regions it is well possible that the probiotics may have lost their efficacy by the time they reach consumers. Recent research suggests that even "zombie" probiotics may be able to enhance immune functions.

A myriad of bacteria, demand sectors and health positionings across diverse regions makes this a highly complex market to understand. The technical nature of the product is also a challenge to addressing consumer trends which are changing at different pace in the different global markets. Giract's study will aim to understand the complexities of each of the markets in scope to provide a decision enabling tool for key personnel in this industry. **A focussed effort will be made to quantify the bacteria volume in freeze-dried equivalent units – this will be a unique feature of this study.**

## OBJECTIVES

The objective is to provide a full understanding of the global probiotic market. This will lead to the following sub-objectives:

- Track production, producers and the trade to arrive at availability in the different regions for 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 2022 based on trends identified

## PRODUCTS

Bacilli, Lactobacilli, Bifidobacteria, Lactococcus, Enterococci, Pediococcus, and other

## MARKETS

Chilled dairy, Functional foods & beverages (probiotic fortified beverages), Infant nutrition / baby food, Dietary/Food supplements, Pharmaceuticals, Clinical nutrition, Pet food

## 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 Sport nutrition

## GEOGRAPHIC

USA+Canada, Brazil, EU28, India, China, Australia, ASEAN, RoW (including Japan, S. Korea)

## TIMESCALE

Current 2017; Forecast (demand) 2022

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For more info, contact

**GIRACT**  
24, Pré-Colomb  
1290 Versoix/Geneva  
Switzerland

V. Krishnakumar, Kaushik Shankar  
Tel: + 41 22 779 0500  
[www.giract.com](http://www.giract.com)  
[info@giract.com](mailto:info@giract.com)

# Probiotics for Human Health Global Supply/Demand 2018-2023

FINAL REPORT

May, 2019

**GIRACT**

Website: [www.giract.com](http://www.giract.com)

Email: [info@giract.com](mailto:info@giract.com)

*by*

**GIRACT**

*24 Pré Colomb*

*1290 Versoix/Geneva*

*Switzerland*

*Tel: +41 22 779 0500*

*info@giract.com*

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