

A GLOBAL LOOK AT THE DIGESTIVE AND PROBIOTIC MARKETS

Global Market Growth

The global probiotics market is projected to grow to **\$64 billion** at a CAGR of 7% from 2017 to 2022.¹



Consumers are turning to probiotics for digestive benefits.



- 76% of US consumers are aware of probiotics.
- 93% of these consumers are aware that probiotics can support digestive health.³

What's driving probiotic market growth in the food & beverage industry?

Consumer demand for digestive health benefits.

- Global food & beverage launches with digestive health-related claims between 2012 and 2016 have a positive **25%** CAGR.⁴

Regional Market Drivers

North America Demand for digestive-related products is growing, and food & beverage manufacturers are aggressively responding.

- The market for digestive products grew 12% between 2012 and 2017.⁵



In Canada, foods and beverages fortified with probiotics are expected to grow at a CAGR of 6.6% through 2022.⁶

Europe Consumer demand and overall interest in probiotics for digestive health remains strong.

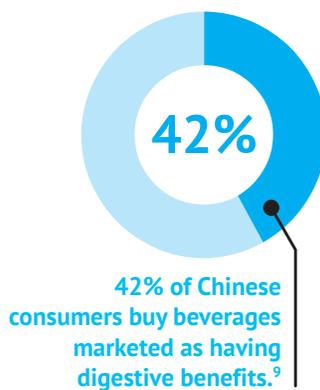
- Europe is second to the Asia Pacific region in the number of foods and beverages launched over the past year with a digestive health claim.⁷



Europe is the second-largest food and beverage probiotic market.

Latin America An expanding middle class has driven growth in digestive and probiotic sales.

- Brazil is the fastest-growing regional market for probiotics in Latin America.
- Brazil leads the probiotic market with an estimated share of **52%** in 2016 and a forecast CAGR of about **11%** between 2017 and 2022.⁸



Asia Probiotics are well established for their health benefits, with opportunities for digestive health and probiotic products for children and older adults.

- China leads the probiotic market with an estimated 35.4% market share.¹⁰

Global Food & Beverage Innovation Opportunities

Global market demands provide opportunities to create unique digestive and probiotic products including better-for-you snacks, baked goods, bars, hot beverages, dairy and nondairy beverages, and frozen goods.



How can food & beverage manufacturers capture global demand for probiotics?



- Start with product diversification – including exploring new food and beverage formats.



- Look for probiotics supported by clinical research that supports efficacy.



- Source research-backed spore-forming probiotics for manufacturing and shelf stability.

GanedenBC³⁰® (*Bacillus coagulans* GBI-30, 6086) is a spore-forming, patented probiotic ingredient that can be formulated into many food, beverage and companion animal products. Backed by over 25 published papers, GanedenBC³⁰ has an exceptional safety record with FDA GRAS status from the United States FDA. Part of Kerry's nutrition and wellness portfolio, GanedenBC³⁰ is natural, vegan, Non-GMO Project verified, organic compliant and allergen-free. For more information, please visit GanedenBC30.com.



1, 2, 4, 6, 8 MarketsandMarkets, Sept. 2017
 3 Kerry 2017 Survey Sampling International (SSI) Consumer Survey, 2017
 5 FONA International report, 2017
 7 Mintel GNPD Analysis 2013–2017
 9 Mintel, 2017
 10 Modar Intelligence, 2017