



Demand for digestive benefits growing at a healthy rate

The global probiotics market is projected to grow to **\$69 billion** at a CAGR of 7.0% through 2023.¹

What's driving demand?

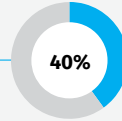


A growing interest in microbiome health: From 2014-2019, Google searches for "microbiome" rose by 267%.²

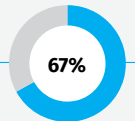


Awareness: More consumers are learning about the connection between a healthy microbiome and a healthy digestive system.

• **40%** of global consumers are actively interested in improving their digestive health.³



• **67%** of U.S. consumers who use probiotic supplements do so for a healthy gut or microbiome.⁴



Consumers understand the role of probiotics in microbiome health:



Globally, **54%** of consumers are already aware that probiotics can promote good digestive health.⁵



Among consumers in the U.S. with an awareness of probiotics, **79%** are aware of the digestive health benefits.⁶



In the UK, **72%** who are aware of probiotic cultures know they can support digestive health.⁷

But demand is not being met

Consumers are having a hard time finding products that meet their calls for:

Transparency: When asked what would encourage purchase of particular healthy lifestyle products, consumers said:



I recognize active ingredients

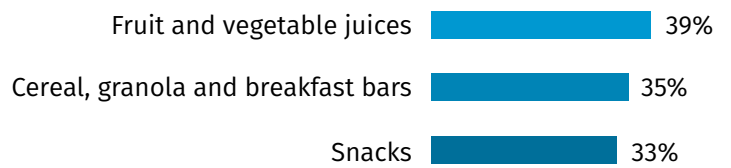


I did my own research on ingredient/product benefits



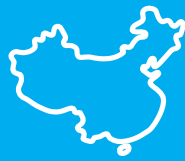
I saw research or data claims for the product

New product formats: While consumers are interested in traditional probiotic formats, they also want to see probiotics formulated into:⁸

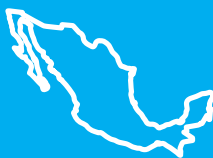


Consumers will switch for GanedenBC³⁰

Research shows that high numbers of consumers would purchase products containing GanedenBC³⁰ (*Bacillus coagulans* GBI-30, 6086) or switch to a brand that did.



In China, **95%** of consumers would definitely or probably buy a product containing GanedenBC³⁰ and 73% would switch to a different brand if their usual one was not available with GanedenBC³⁰.



In Mexico, **88%** of consumers would definitely or probably buy a product with GanedenBC³⁰ and 73% would switch to a different brand if their usual brand was not available with GanedenBC³⁰.

Opportunity for innovation

Because GanedenBC³⁰ is more resistant to extremes of pH, heat, cold, and pressure, it's a **better fit for fortification of everyday foods and beverages.**

Download our white paper for more proprietary consumer insights and opportunities to meet consumer demand.



¹ MarketsandMarkets, Global Probiotic Market Forecast to 2023, Dec 2018.

² Mintel – Attitudes towards Healthy Eating – UK, February 2019

³ FMCG Gurus – Insights and Opportunities: Global digestive health, 2019

⁴ Mintel, Achieving Digestive Wellness with Food and Drink, August 2018

^{5,6,7,8} Kerry Global Consumer Survey – Digestive & Immune Health, 2019

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