

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

INTRODUCTION	<p>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 other medical/health benefits.</p> <p>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 where probiotics/prebiotics show benefit include 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 conditions that are not often associated with probiotic/prebiotic benefits: insulin resistance, non-alcoholic fatty liver disease, <i>H. pylori</i> infection, and even general health-related quality of life.</p> <p>Probiotics are also being discovered for managing ageing. A next-generation probiotic bacteria discovered in fermented food in the North East of India has been found to promote longevity and healthy aging. <i>Lactobacillus plantarum JBC5 (LPJBC5)</i>, 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 <i>C.elegans</i> and provides evidence for healthy ageing.</p> <p>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 USD 30 million production facility in Valencia, Spain.</p> <p>In its proposed research, Giract will explore newer applications in the post-Covid era that may require new delivery mechanisms. As with its 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 not only unique but also highly useful at the operational and strategic decision-making processes in this complex business.</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 cultures by volume • 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	<p><i>Bacilli, Lactobacilli, Bifidobacteria, Lactococcus, Enterococci, Pediococcus, etc.</i> <i>Post-biotics will be covered as competitor ingredients and will comprise dead/heat-killed bacteria only; metabolite-derived post-biotics will not be covered.</i></p>
MARKETS	<p>Chilled dairy, Functional foods & beverages (probiotic fortified beverages), Infant nutrition / baby food, Dietary/food supplements, Pharmaceuticals, Clinical nutrition, Pet food, Animal/aquaculture nutrition</p>
POSITIONING	<p>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, Performance nutrition</p>
GEOGRAPHICAL	<p>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, Taiwan, Japan, Africa, Other LATAM)</p>
TIMESCALE	<p>Current estimates – 2023; Forecasts – 2028</p>
SUBSCRIPTION	<p>Please contact us for subscription details</p>

For more info, contact

GIRACT
 24, Pré-Colomb
 1290 Versoix/Geneva
 Switzerland

Graham Robinson
 Tel: + 41 22 779 0500
 info@giract.com
 www.giract.com