Global Market Review of Probiotics – Forecasts to 2013

Description: Probiotics are the so-called ‘good bacteria’ which help to maintain a healthy balance of bacteria within the digestive system. The World Health Organization (WHO) defines probiotics as “live micro-organisms which, when consumed in adequate amounts, provide measurable health benefits”.

Around 30% of the global population buys into the probiotic dairy sector on a regular basis, representing a major part of the US$85bn global functional foods market, of which the US, Western Europe and Japan account for over 70%. In 2008, the global probiotics market (including both foodstuffs and supplements) was worth over US$15.7bn, or over 18% of the global functional foods market. Since 2003, the global probiotics market has more than doubled in value terms, and is currently rising by almost 15% per annum.

Although probiotics remain best suited to dairy products such as spoonable and drinking yoghurts, probiotic products have emerged in sectors such as breakfast cereals, infant formula and soft drinks.

Many of the trends currently affecting the global probiotics market are related to the global regulatory environment, which is generally becoming stricter and affecting which health claims manufacturers can make for their products. Other important trends include ongoing research into the possible benefits of probiotics, as well as product development trends.

This new first edition report from just-food reviews the global market for the probiotics sector, looking at each sub-sector within, current trends, consumer dynamics, industry supply and new product activity, plus just-food analyses and predict the future for this dynamic sector.

Following on from chapter 1’s introduction, chapter 2 analyses the global market. This chapter provides market values by country/region, including the 11 leading markets for dairy probiotics and their 2008 market values, and the leading ingredients market values. The global market for probiotic foods, supplements and ingredients are all analysed, with major market data and recent product activity presented.

Extract: Probiotic products are now starting to feature in non-chilled sectors, notably breakfast cereals, bakery products, confectionery, infant formula and soft drinks. This trend is expected to continue in the future – according to a probiotic ingredients manufacturer: “the shelf-stable probiotic foods sector will be a growth market over the next few years”. In the words of another industry source: “new technologies could even allow encapsulated probiotics into heat-treated products”.

Chapter 3 Current trends
Regulatory environment and product development trends are focused on throughout this chapter. Areas covered:

The changing regulatory environment
Industry promotion
Product trends
Recent research/studies
Recent negative press

Chapter 4 Consumer dynamics
With greater sections of the population now living longer, demand is rising for products which can help people lead healthy lifestyles well beyond what has traditionally been thought of as middle age. In addition, a greater awareness of health issues has been the major reason behind the recent growth of the global functional foods industry. As the market has developed, more consumers have been moving beyond simple motivations such as trying to lose weight or maintain normal health levels. Instead, people are increasingly looking to optimise levels of performance and wellness, in areas such as digestive and cardiovascular health.

Here, the report reviews the most recent consumer dynamics shaping the sector, covering areas including: attitudes to health claims, consumer awareness, consumer penetration.

Extract:
Although awareness levels of probiotics have risen within the last few years, this has yet to result in large-
scale penetration amongst consumers in many parts of the developed world. According to a spokesman from Müller, the main reasons for this can be summarised as follows: “A lack of trust that the products have any real benefit; a perception that it’s all about hype, and not real science; and a scepticism that the products themselves do not contain enough of the beneficial ingredients to make a real difference.”

Chapter 5 Industry supply
The global market for probiotic products is dominated by a number of multinational dairy operators. The supply structure is not so clear-cut in the non-dairy sector, where probiotic products are less evident. Whilst the market for probiotic supplements remains highly fragmented in nature.

This chapter provides background, market position information, current developments and financial information on some of the leading companies. Those mentioned in chapter 5 include:

Groupe Danone, Nestlé, Yakult Honsha, Müller, Arla Foods, Valio, FrieslandCampina, Skånemejerier, Dale Farm, General Mills, Stonyfield Farm, Kraft Foods, Dr Oetker, Yili Group, Mengniu, Morinaga Milk Industry, Meiji Dairies, Kerry Group, Coca-Cola, Naked Juice, NextFoods, Christian Hansen, DSM Food Specialties, Cargill, Probi, BioGaia, Puleva Biotech, Nebraska Cultures.

Chapter 6 New product activity
New product activity taking place within the global market is discussed in this chapter, segmented into dairy and non-dairy products. Just-food illustrates trends in the global market by looking at major examples of probiotic products launched over the last few years.

Chapter 7 The future
The report concludes with just-food’s outlook for the future over the next five years. This chapter includes market values for the global probiotics food and supplements sectors from 2008 to 2013. Just-food attempts to estimate the likely outcome of forthcoming legislation regarding health claims, plus other macro factors that will likely play a part in determining the sector’s performance and potential.
Current developments
- Financial information

Yakult Honsha
- Background
- Market position
- Current developments
- Financial information

Müller
- Background
- Market position
- Current developments
- Financial information

Arla Foods
- Background
- Market position
- Current developments
- Financial information

Valio
- Background
- Market position
- Current developments
- Financial information

Other companies
- FrieslandCampina
- Skånemejerier
- Dale Farm
- General Mills
- Stonyfield Farm
- Kraft Foods
- Other ‘other companies’
- Suppliers of probiotic ingredients

Chapter 6 New product activity
- Dairy products
- Non-dairy products

Chapter 7 The future
- Market size and trends
- Corporate developments

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