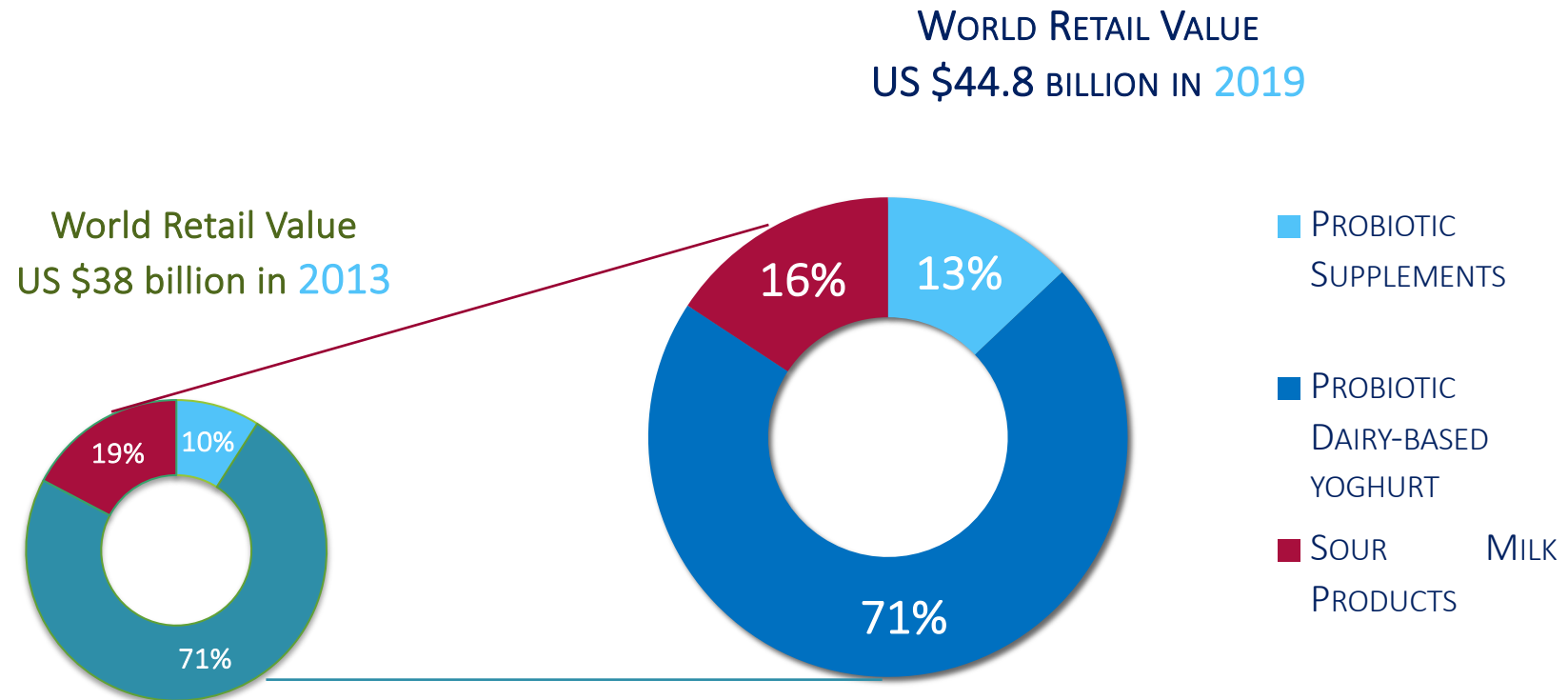




European Probiotic Market Insights - 2019

April 2020

Probiotic Consumption - A Global Perspective



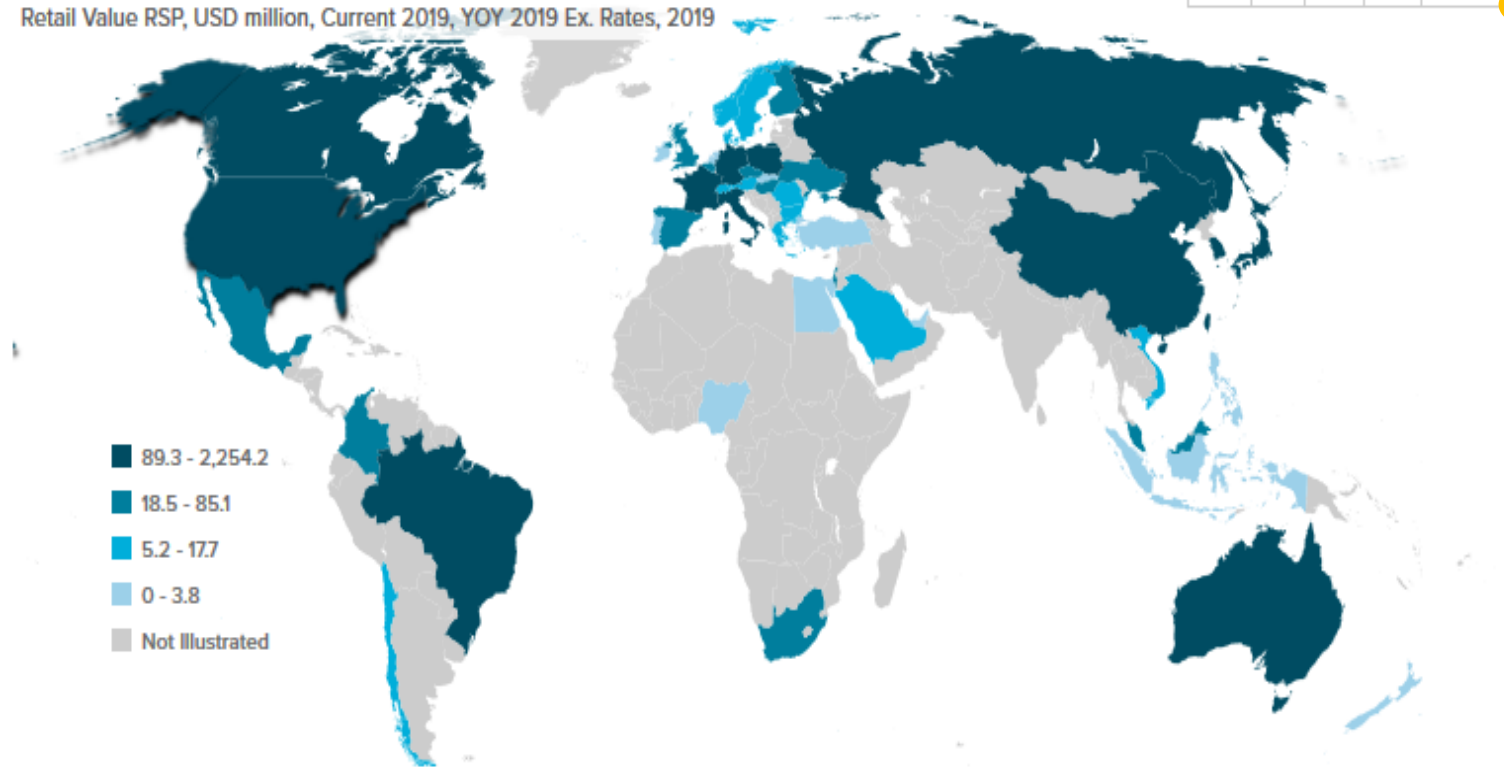
Source: Elaboration IPA on Euromonitor International data

Market Overview – Probiotics Supplements

Probiotic Supplements

Market Size ▼

Retail Value RSP, USD million, Current 2019, YOY 2019 Ex. Rates, 2019



GROWTH OF APPROX.
\$300 MILLION USD SINCE
2018

Global Figure

2019, USD million

6,076.2

Regional Comparison

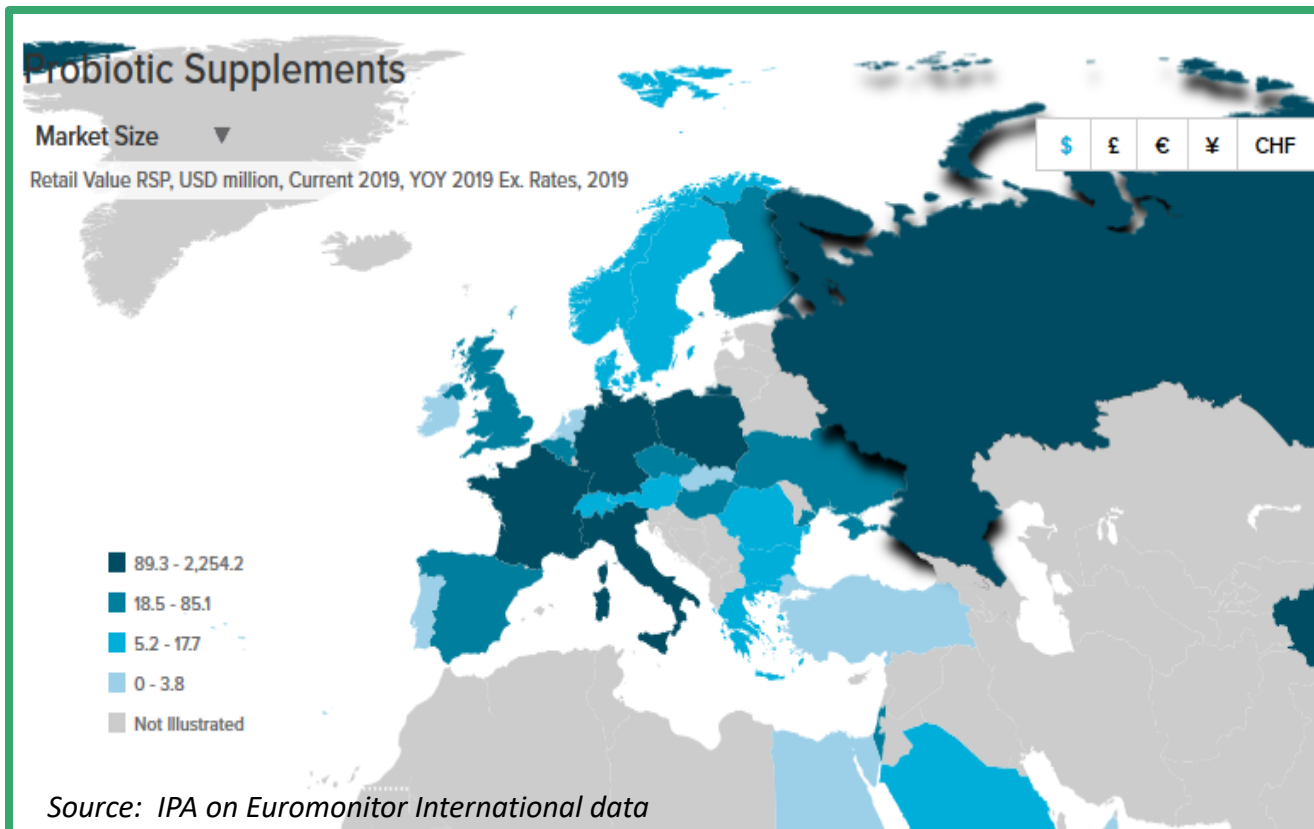
2019, USD million

Asia Pacific	1,591.6
Australasia	163.7
Eastern Europe	490
Latin America	241
Middle East and Africa	82.2
North America	2,343.4
Western Europe	1,164.3

Source: IPA on Euromonitor International data

Market Overview – Probiotic Supplements

THE EUROPEAN PROBIOTIC SUPPLEMENT MARKET WAS \$1,654.3 M USD IN 2019
CLOSE TO A THIRD OF GLOBAL CONSUMPTION



Regional Comparison

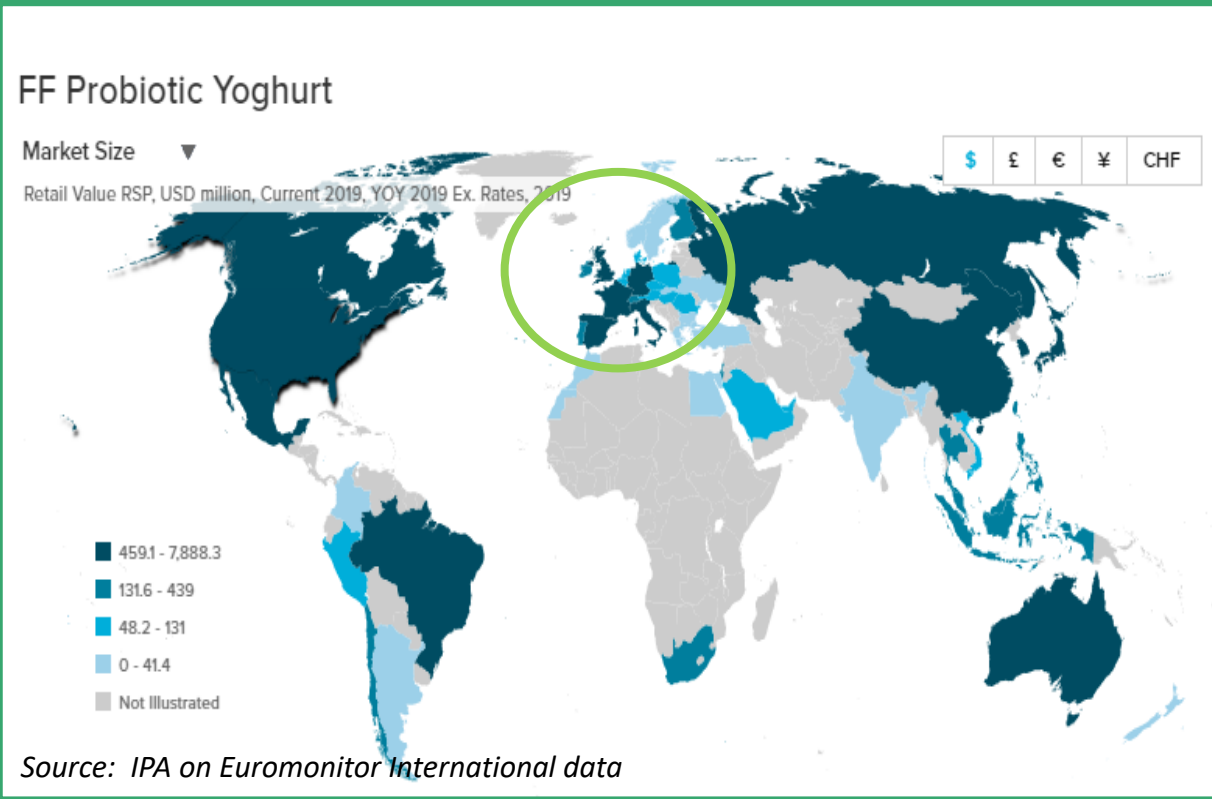
2019, USD million

Asia Pacific	1,591.6
Australasia	163.7
Eastern Europe	490
Latin America	241
Middle East and Africa	82.2
North America	2,343.4
Western Europe	1,654.3

Market Overview – Probiotic Yogurts

Plain, Flavored Probiotics Yogurts & Drinking Yogurts with Probiotics

WESTERN EUROPE'S PROBIOTIC YOGHURT MARKET IS WELL DEVELOPED, WITH FEW HIGH-VALUE MARKETS



GLOBAL FIGURE

2019, USD MILLION

\$31,107.9

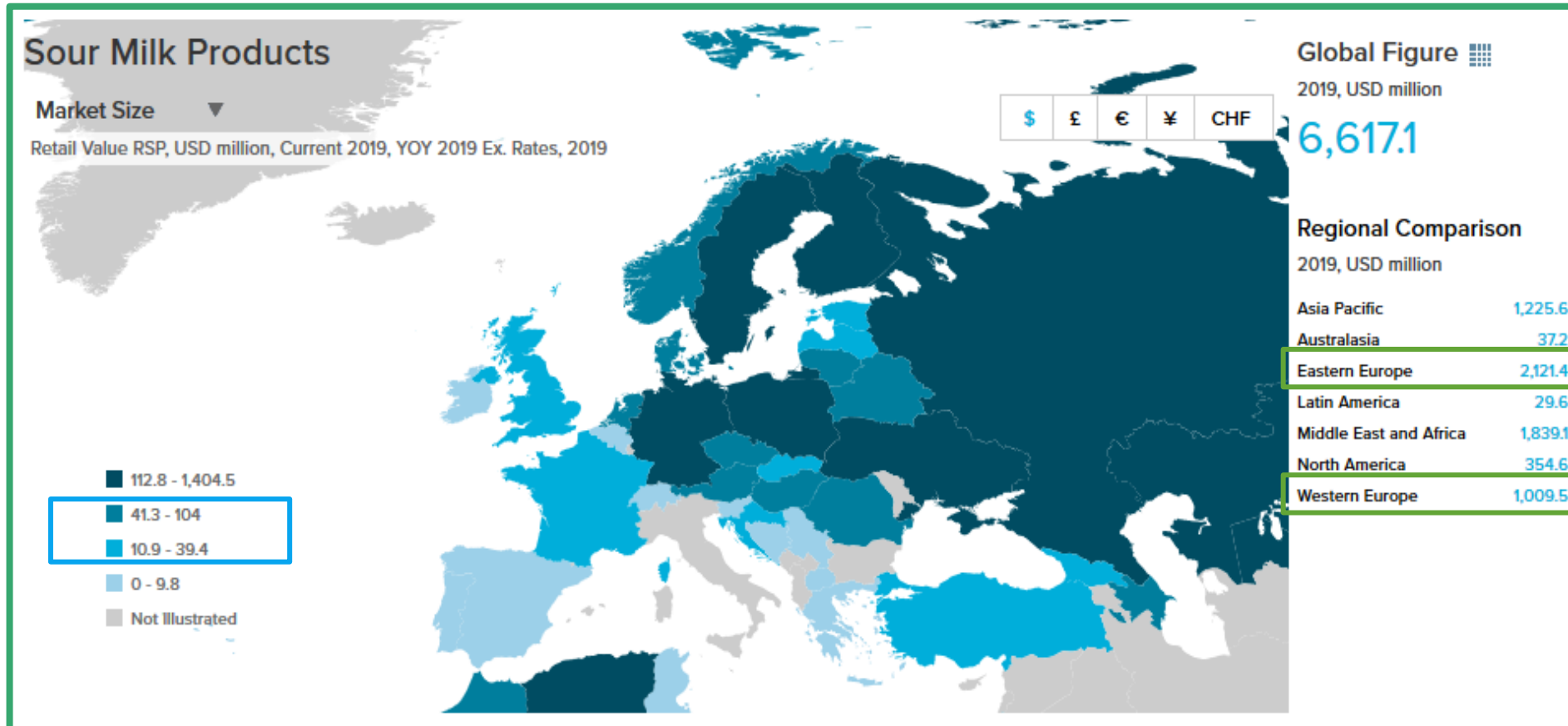
Regional Comparison

2019, USD million

Asia Pacific	16,896.5
Australasia	960.5
Eastern Europe	1,156.1
Latin America	2,804.8
Middle East and Africa	1,545
North America	3,468.8
Western Europe	4,276.3

Market Overview – Sour Milk

EUROPE IS MADE OF MANY WELL-DEVELOPED SOUR MILK PRODUCT MARKETS SPREAD ACROSS THE EAST AND WEST. THE CONTINENT MAKES UP OF OVER 47% OF SOUR MILK PRODUCTS SPEND GLOBALLY.



Definitions*

Probiotic Yoghurt

Pro/Pre Biotic yoghurt comprises of all variants of dairy-based yoghurt with added generic or documented probiotic strains or prebiotics. Generic probiotic strains include Lactobacillus acidophilus, Bifidobacteria and Lactobacillus casei. Documented probiotic strains are labelled with additional alphanumeric strain designation and include: Bifidobacterium BB-12 (Chr. Hansen) , Bifidobacterium lactis DN 173010, also known as Bifidus ActiRegularis (proprietary Danone, Activia), Bifidobacterium HN019 (Danisco), L.acidophilus LA-5 (Chr. Hansen), L.acidophilus NCFM (Danisco), L.rhamnosus LGG (Valio), L.rhamnosus HN001 (Danisco), L.paracasei 431 (Chr. Hansen), L. paracasei/casei Shirota (proprietary Yakult), L.paracasei DN114011 (proprietary Danone, DanActive), L.plantarum 299V (Probi AB). Most common prebiotics include oligosaccharides (fructooligosaccharides (FOS), xylooligosaccharides (XOS), polydextrose, galactooligosaccharides (GOS), lactulose and tagatose) and inulin.

Probiotic Supplement

Beneficial bacteria, such as Lactobacillus acidophilus and bifidus and some other proprietary probiotic strains, are called probiotics. Probiotic bacteria favourably alter the intestinal micro flora balance, inhibit the growth of harmful bacteria, promote good digestion, boost immune function, and increase resistance to infection. Only include dietary supplement forms and probiotics approved as OTC drugs (usually considered as diarrhoeal remedies). Include saccharomyces boulardii probiotics. Exclude all spoonable and drinking probiotic/prebiotic yoghurt, which are tracked in the Health and Wellness (HW) system. Exclude prebiotics.



References & Contact Details

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The **International Probiotics Association – Europe** (IPA Europe) is an international non-profit organisation based in Brussels. IPA Europe brings together a unique forum of worldwide leading producers of probiotics and of the parent organisation IPA.

The IPA Europe Mission is: to gain acceptance of the term “probiotic” throughout Europe as a defined category and to create a favourable environment for probiotics.

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