Global and European Probiotic Market Insights

2018-2021
Probiotic Consumption – Global Figures

World retail value:
US$ 44,8 billion in 2019

World retail value:
US$ 47,6 billion in 2021

Source: IPA on Euromonitor International Data, Lumina on online sales
Probiotic Consumption - Europe

European retail value: 8.840 EUR million in 2019

European retail value: 9.401,6 EUR million in 2021

Source: IPA on Euromonitor International Data, Lumina on online sales
European Market Overview - Probiotics

The European market overview in 2018 was 8.618,9 EUR million, reaching 9.401,6 EUR million in 2021, with a growth of 9.08%.

The decrease of the probiotic supplements for 2020 is compensated by the increase of the on-line sales, as from the data of Lumina International.

Source: IPA on Euromonitor International Data, Lumina on online sales
Global Market overview - Probiotic Supplements


Expected growth of 3,7% on average in the forecast period (2021-2026).

Europe ranks 3rd, after North America and Asia Pacific.

Source: IPA on Euromonitor International Data, Lumina on online sales
European Market Overview - Probiotic Supplements

Online sales 2020: 99 EUR million
Online sales 2021: 190 EUR million

The European probiotic supplement market:
- **1.464 EUR million in 2021**, close to 25% of global consumption (+7.6% from 2018 to 2021)
- It was 1.361.1 EUR million in 2018.
- **Growth in Europe is projected to be about 3% CAGR for the period 2021-2026.**

- The decrease in European retail value of about -21.2 EUR million in 2020 was compensated by the online sales valued 99 EUR million in 2020.
- The online sales for probiotic supplements is driven by Europe in 2021, with a market size of **$225 mln** (190 EUR million with 2021 average ex. rate)

*Source: IPA on Euromonitor International Data, Lumina on online sales*
Eastern and Western Europe market overview – Probiotic Supplements

- With the additional sales generated by e-commerce of 190 EUR million, Europe reaches **1.654 EUR Million** in 2021.
- Italy is the 3° largest market in the world. The Italian market size was 557,2 EUR million in 2018, reaching 560,5 EUR million in 2021.
- Poland is the largest country for probiotic supplements in Eastern Europe with 79,8 EUR million in 2021.

Source: IPA on Euromonitor International Data, Lumina on online sales
Probiotic supplements 2021: E-com growth is driven by Europe

Probiotic Supplements by Country. E-COM Market Size and % Growth. 2021 (est)

- **Europe**: $225m, +31% in 2020, +20% in 2021
- **Americas**: $682m, +31% in 2020, +15% in 2021
- **APAC**: $772m, +40% in 2020, +15% in 2021

The online sales for probiotic supplements are driven by Europe in 2021, with a market size of $225 mln.

Global market overview – Probiotic Yoghurts
Plain, Flavored and Drinking Yogurts fortified with probiotics


Projected 2,7% growth on average in the forecast period 2021-2026.

Western Europe ranks 2nd, after Asia Pacific.

Source: IPA on Euromonitor International Data, Lumina on online sales
European market overview – Probiotic Yoghurts Plain, Flavored and Dairy Drinking

- The European probiotic yogurt market reached 5.001.5 EUR million in 2021, it was valued 4.674 in 2018
- +7.0% of increase from 2018 to 2021

Source: IPA on Euromonitor International Data, Lumina on online sales
Eastern and Western Europe market overview
Probiotic Yoghurts

• The total European market valued at 5.001,5 EUR million in 2021, up from 4.674 in 2018 (7,0% of increase).

• UK is the first country in Western Europe with a volume of 1015,9 EUR million for probiotic yogurt, followed by Spain with 673,2 EUR million in 2021.

• Poland is the first country in Eastern Europe with a volume for probiotic yogurt of 105,1 EUR million in 2021.

Source: IPA on Euromonitor International Data, Lumina on online sales
Global market overview – Sour Milk Products

- Projected 3.0% growth on average in the forecast period (2021-2026)

Source: IPA on Euromonitor International Data, Lumina on online sales
The European market valued 2.583,8 EUR million in 2018 and reached 2.936,1 EUR million in 2021 (+13,63% increase).

- Europe is made of many well-developed sour milk product markets spread across the East and West.
- The continent is over 47% of sour milk products spend globally.

Source: IPA on Euromonitor International Data, Lumina on online sales
Eastern and Western Europe – Sour Milk Products

Eastern Europe ranks 1st in the global figure.

- Germany is the largest country in Western Europe with a volume of 232,5 EUR million in 2021.
- Poland is the largest country in Eastern Europe with a volume of 146,2 EUR million for sour milk in 2021.

Western Europe market valued 899,4 EUR million in 2018 and reached 1,083,2 EUR million in 2021.

Eastern Europe market valued 1,684,4 EUR million in 2018 and reached 1,852,9 EUR million in 2021.

Source: IPA on Euromonitor International Data, Lumina on online sales
**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 HNO01 (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.

*Copyrigth Euromonitor International*
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.