



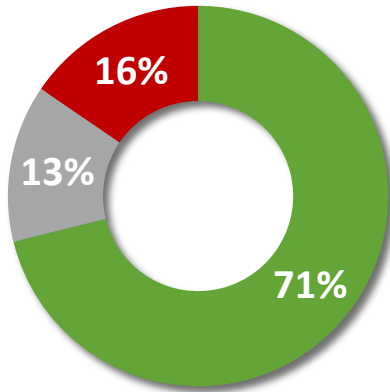
# Global and European Probiotic Market Insights

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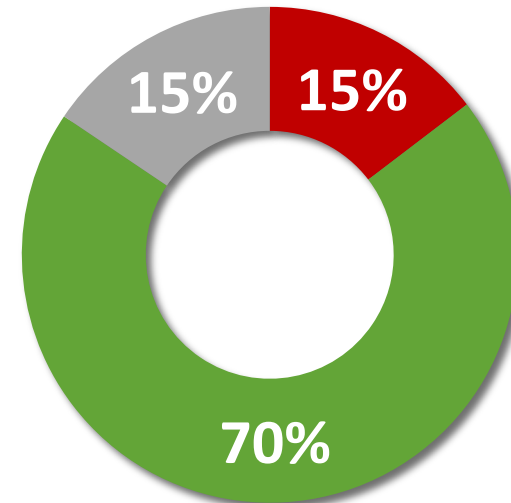
2018-2021




# Probiotic Consumption – Global Figures

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



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

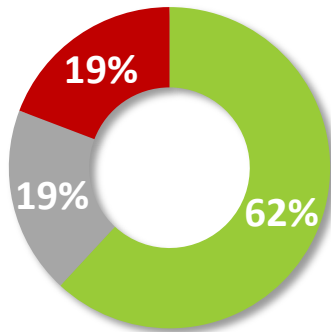


-  Sour Milk Products
-  Probiotic Yoghurts
-  Probiotic Supplements

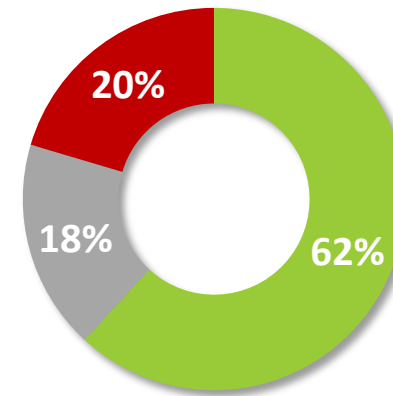
Source: IPA on Euromonitor International Data, Lumina on online sales




# Probiotic Consumption - Europe

European retail value:  
8.840 EUR million in 2019



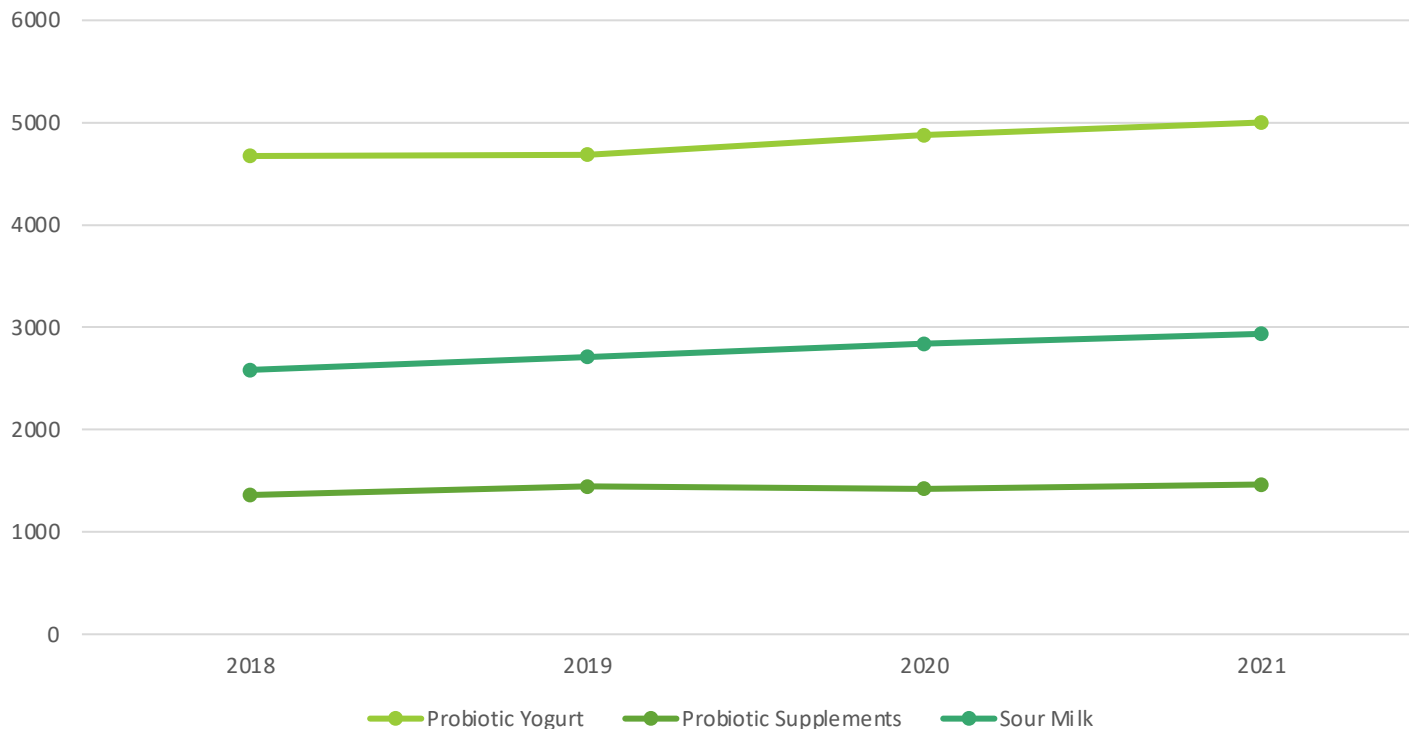
European retail value:  
9.401,6 EUR million in 2021



-  Sour Milk Products
-  Probiotic Yoghurts
-  Probiotic Supplements

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

## Probiotic Supplements

Market Size ▼

Retail Value RSP, USD million, Current 2021, YOY 2021 Ex. Rates, 2021

\$ £ € ¥ CHF

Global Figure ■■■

2021, USD million

6,970.1

Regional Comparison

2021, USD million

Asia Pacific

Australasia

Eastern Europe

Latin America

Middle East and Africa

North America

Western Europe

108.3 - 2,285.2  
24 - 95.8  
6.8 - 20.3  
0 - 5.6  
Not Illustrated

Growth OF US\$ 6.970 million since 2018.

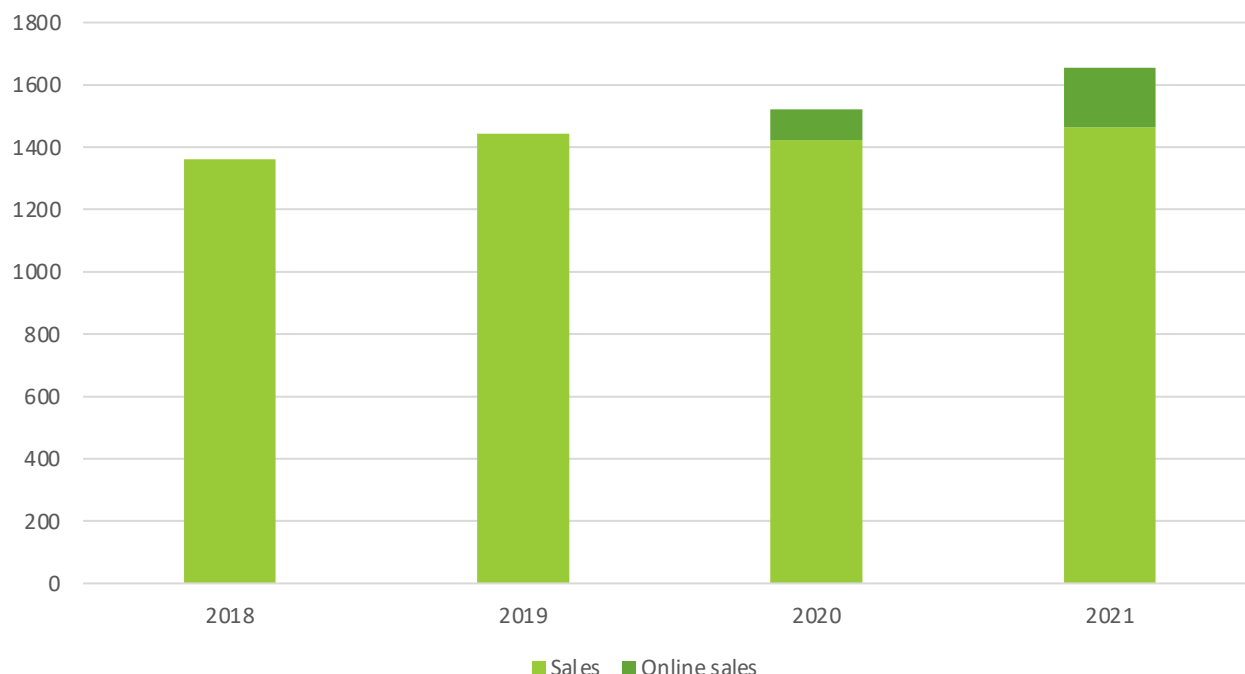
Expected growth of 3,7% on average in the forecast period (2021-2026).

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.*

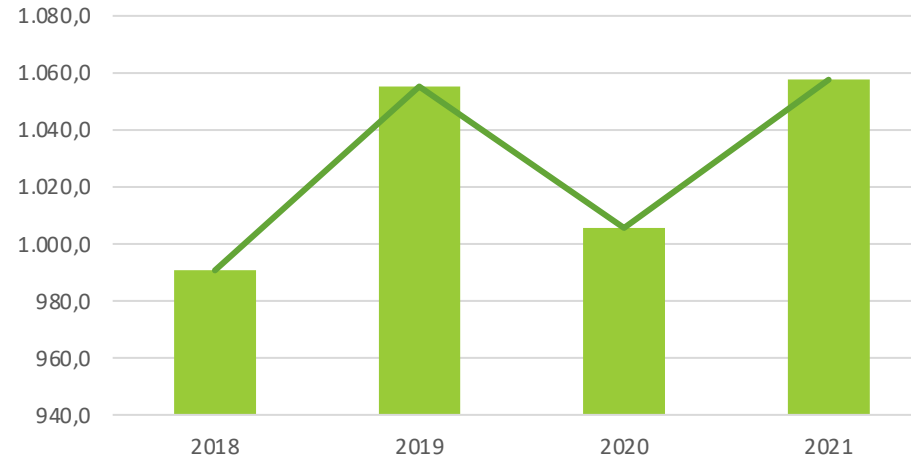
- ❑ The decrease in European retail value of about -21,2 EUR million in 2020 was compensated by the online sales valued 99 EUR million in 2020.
- ❑ The online sales for probiotic supplements is driven by Europe in 2021, with a market size of **\$225 mln** (190 EUR million with 2021 average ex. rate)

Source: IPA on Euromonitor International Data, Lumina on online sales

# Eastern and Western Europe market overview – Probiotic Supplements

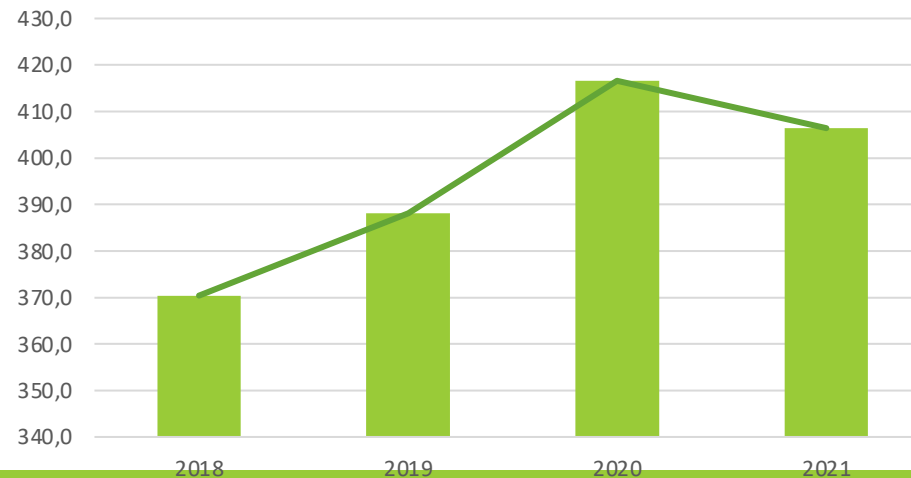
- With the additional sales generated by e-commerce of 190 EUR million, Europe reaches **1.654 EUR Million in 2021**
- Italy is the 3° largest market in the world. The Italian market size was 557,2 EUR million in 2018, reaching 560,5 EUR million in 2021
- Poland is the largest country for probiotic supplements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

Probiotic Supplements in Western Europe 2018-2021



The market of probiotic supplements in Western Europe valued 990,7 EUR million in 2018 to **1.057,6 EUR million in 2021**

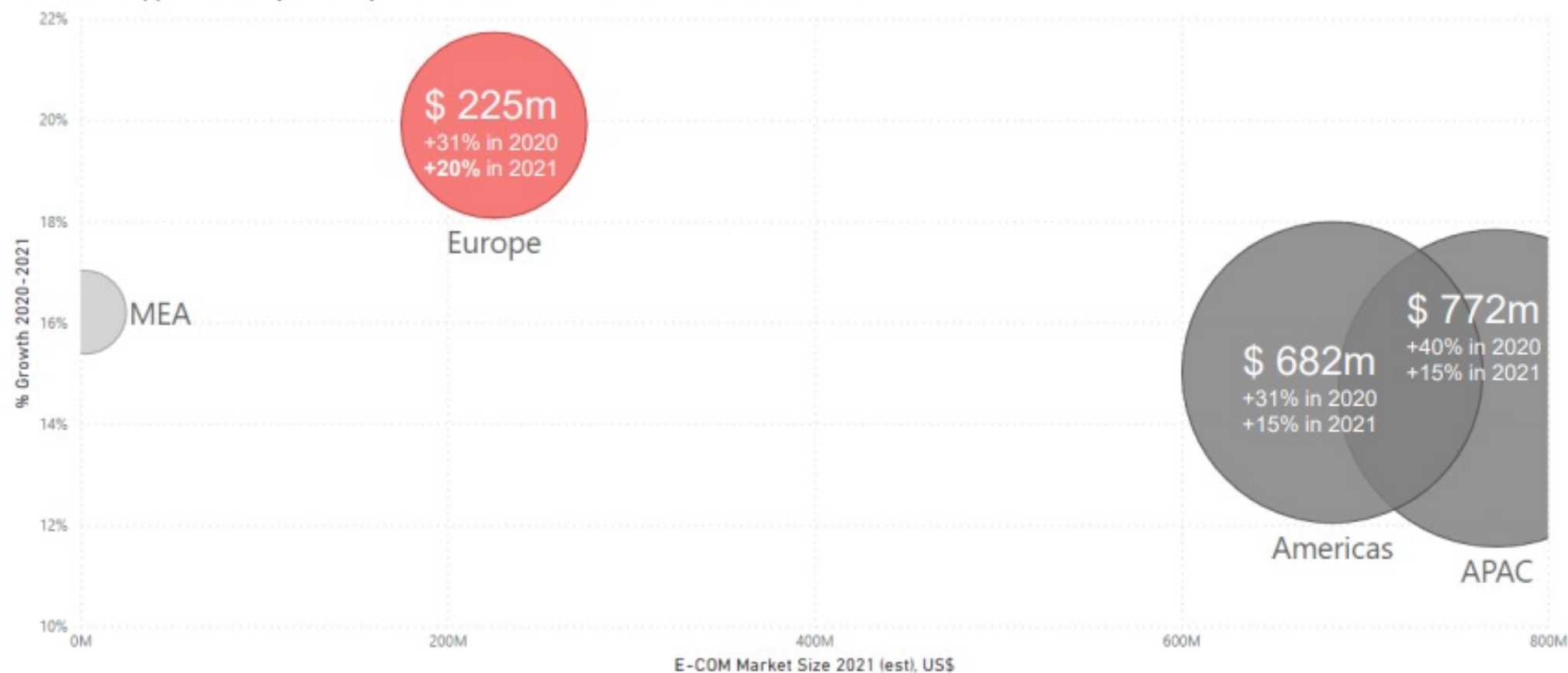
Probiotic Supplements in Eastern Europe 2018-2021



The Eastern Europe market valued 370,4 EUR million in 2018 and reaches **406,4 EUR million in 2021**

## Probiotic supplements 2021: E-com growth is driven by **Europe**

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



Probiotic supplements: The global e-commerce market valued at **US\$ 1.7 billion in 2021**, up from **US\$ 928 million in 2018** (+81%)

## KEY NUMBERS, 25 COUNTRIES

2020

**1.5bn**

E-COM Market Size,  
US\$

**35%**

% Growth in 2020

2021 (EST)

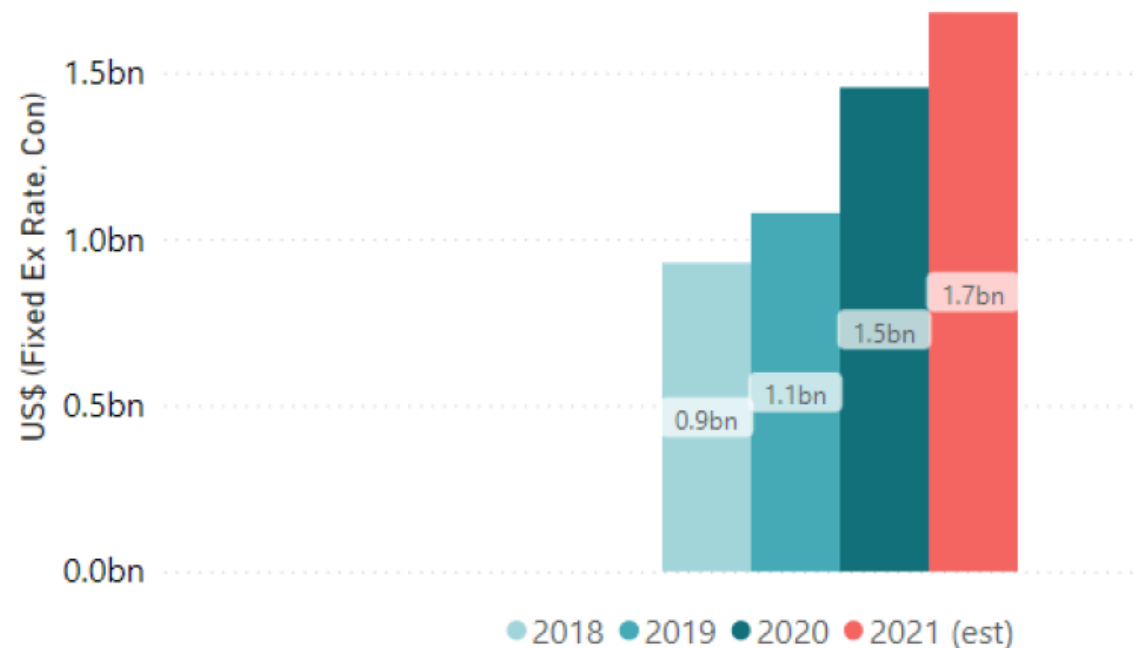
**1.7bn**

E-COM Market Size,  
US\$

**15.5%**

% Growth in 2021

## Probiotic Supplements, E-Commerce Market Size, 2018-2021



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

### FF Probiotic Yoghurt

#### Market Size ▼

Retail Value RSP, USD million, Current 2021, YOY 2021 Ex. Rates, 2021

\$ £ € ¥ CHF

#### Global Figure

2021, USD million

33,248.1

#### Regional Comparison

2021, USD million

Asia Pacific

Australasia

Eastern Europe

Latin America

Middle East and Africa

North America

Western Europe

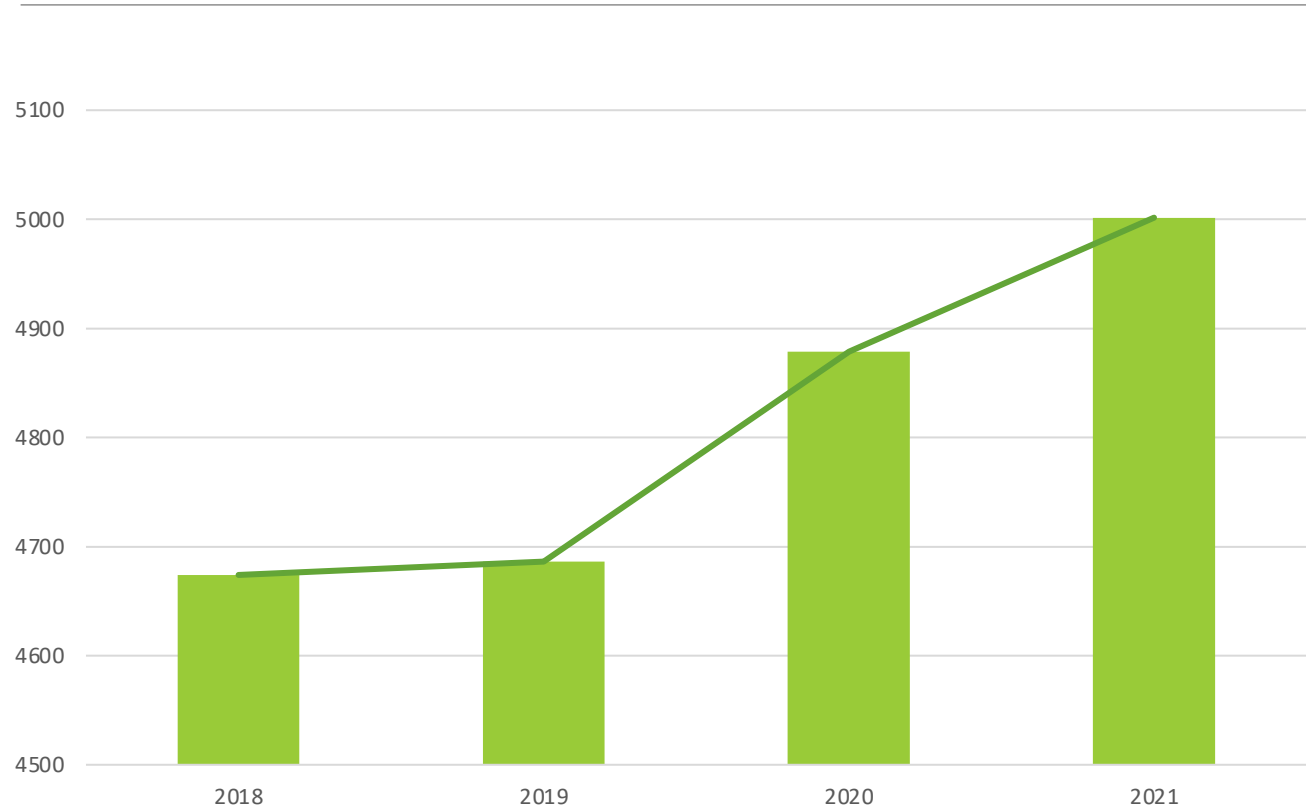
502.9 - 8,683  
143.3 - 452  
53.1 - 125.4  
0 - 52.5  
Not Illustrated

Growth from US\$ 31.107,9 million in 2019 to US\$ 33.248,1 million in 2021.

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

Western Europe ranks 2nd, after Asia Pacific.

# 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

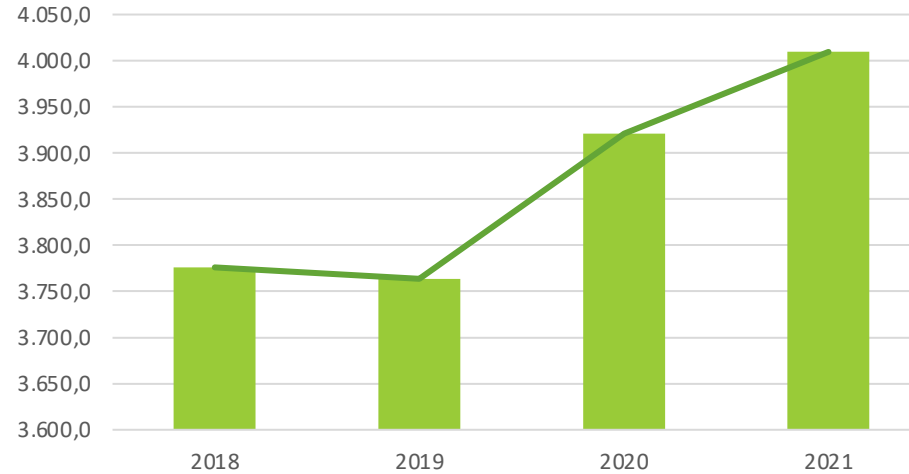
Source: IPA on Euromonitor International Data, Lumina on online sales

# Eastern and Western Europe market overview

## Probiotic Yoghurts

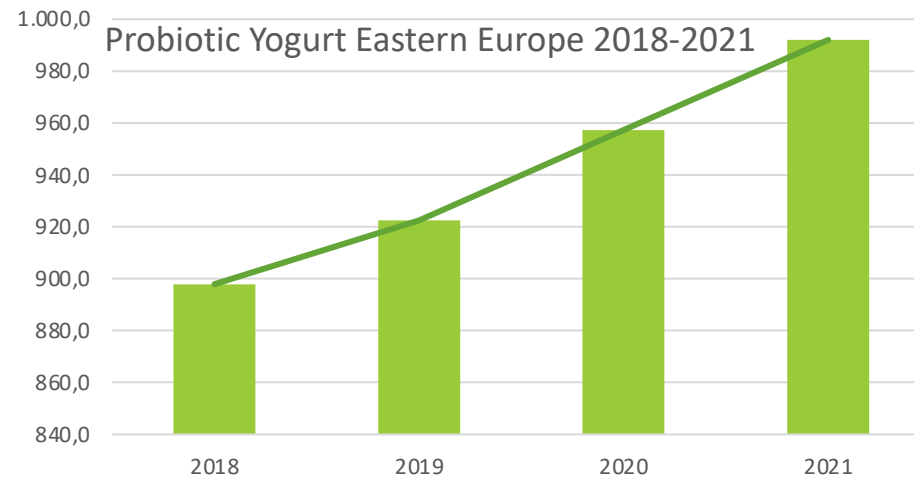
- The total European market valued at 5.001,5 EUR million in 2021, up from 4.674 in 2018 (7,0% of increase).
- UK is the first country in Western Europe with a volume of 1015,9 EUR million for probiotic yogurt., followed by Spain with 673,2 EUR million in 2021.
- Poland is the first country in Eastern Europe with a volume for probiotic yogurt of 105,1 EUR million in 2021.

Probiotic Yogurt Western Europe 2018-2021



The Western Europe market was valued 3.776,1 EUR million in 2018 and reached 4.009,5 EUR million in 2021

Probiotic Yogurt Eastern Europe 2018-2021



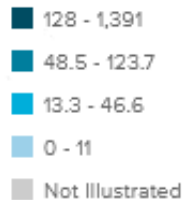
The Eastern Europe market was valued 897,9 EUR million in 2018 and reached 992 EUR million in 2021

# Global market overview – Sour Milk Products

## Sour Milk Products

### Market Size ▼

Retail Value RSP, USD million, Current 2021, YOY 2021 Ex. Rates, 2021



\$ £ € ¥ CHF

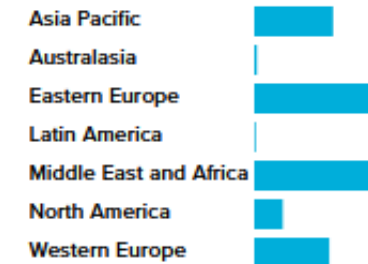
### Global Figure

2021, USD million

7,418.3

### Regional Comparison

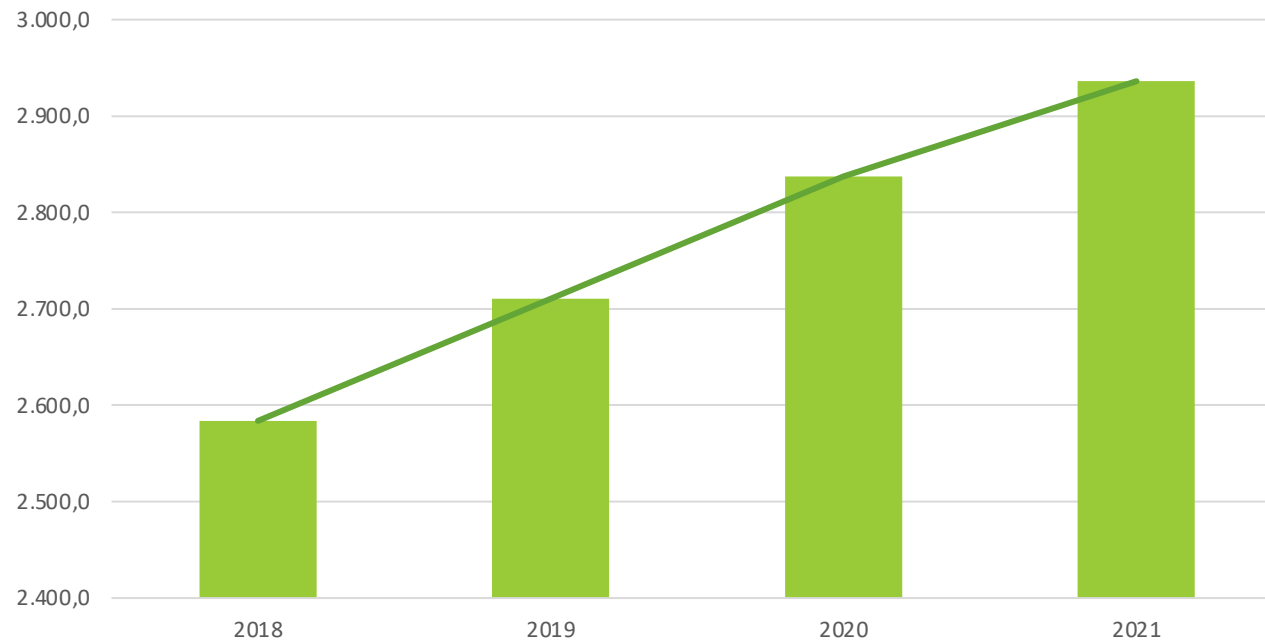
2021, USD million



- ❑ Growth to US\$ 7.418 million in 2021 from 6.617 in 2019.
- ❑ Projected 3,0% growth on average in the forecast period (2021-2026)

Source: IPA on Euromonitor International Data, Lumina on online sales

# European Market Overview – Sour Milk Products



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.

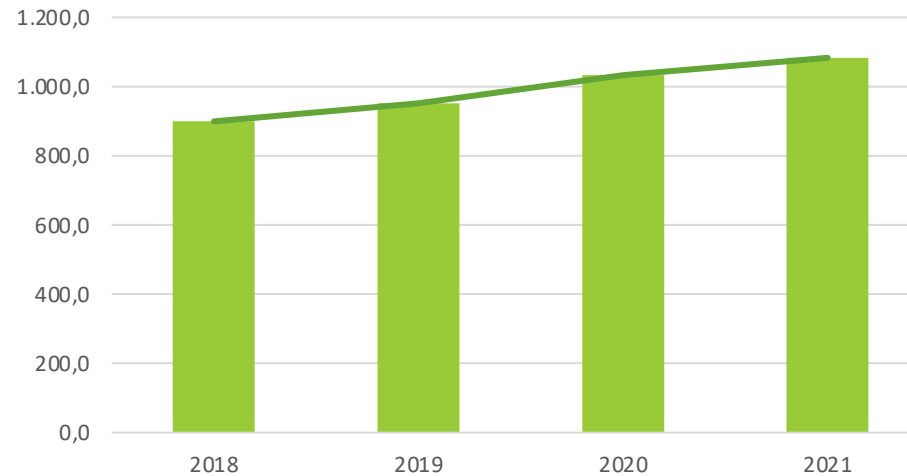
Source: IPA on Euromonitor International Data, Lumina on online sales

# Eastern and Western Europe – Sour Milk Products

Eastern Europe ranks 1st in the global figure.

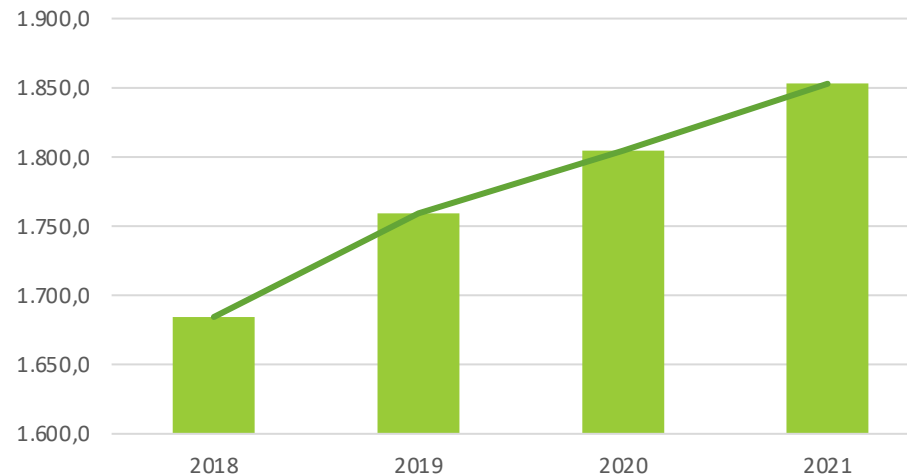
- Germany is the largest country in Western Europe with a volume of 232,5 EUR million in 2021.
- Poland is the largest country in Eastern Europe with a volume of 146,2 EUR million for sour milk in 2021.

Sour Milk Western Europe 2018-2021



Western Europe market valued 899,4 EUR million in 2018 and reached 1.083,2 EUR million in 2021

Sour Milk Eastern Europe 2018-2021



Eastern Europe market valued 1.684,4 EUR million in 2018 and reached 1.852,9 EUR million in 2021

# Definitions\*

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## 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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