

PRESS RELEASE

Probiotics in Europe: consumer survey in 8 EU countries

The complete report is now available

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To monitor the evolution of European consumers' opinions, trends and behaviours regarding probiotic foods and supplements, **the International Probiotics Association - Europe¹ commissioned** the market research company **3Gem** to carry out a survey with a representative sample. The evolution of European consumers' opinions, trends and behaviours regarding probiotic foods and supplements shows a strong interest in overall health and well-being. It also highlights the fact that consumers would like to be more informed on the labelling and in communications about probiotic food and food supplements, and about probiotic microorganisms in food and food supplements. This is one of the key findings of the consumer survey conducted by 3Gem and commissioned by IPA Europe.

The online survey was carried out in 8 European countries (Italy, Denmark, the Netherlands, Spain, Poland, Belgium, Germany and Sweden) on a total of 8000 consumers² to assess people's understanding of the probiotic offer currently on the market, and their use of probiotic foods and supplements in daily life.

The overall results indicate that probiotics are popular, even people who do not use or buy probiotics know the term.

It appears that for the majority of consumers the answer to "Do you know what probiotics and probiotic foods are?" is "yes" (63%). Women and men seem to consume probiotics almost equally. On average the peak consumption is in the 25-44 age group.

There is quite a substantial set of people who know the word 'probiotic', even though they say that they do not consume them. This is probably due to the large amount of information available on probiotics in online search engines on the web, mainly from commercial sources and news outlets.

¹ IPA Europe is the European chapter of IPA, the International Probiotics Association; it was established in Brussels in 2015. The members of IPA Europe are Companies directly engaged in Europe in the manufacture of probiotic cultures or probiotic foods, supplements, and nutritional or therapeutic products. 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 in Europe.

² 3Gem conducted this online survey in 8 European countries on a total of 8000 consumers. Per country: n= 1000 respondents/18+ years old/nat.rep. by age, gender, and region. In Italy, Denmark, the Netherlands and Spain the term 'probiotic' is (partially) allowed by National guidance/standards; Poland, Germany, Belgium and Sweden do not have national standards and follow the interpretation of the European Commission indicating the term probiotic as an example of health claim only.

³ European Commission's guidance of 2007 on the implementation of regulation 1924/2006
https://www.fsai.ie/uploadedFiles/EU_guidance_ClaimsRegulation.pdf

However, these sites often fail to paint a complete picture, so consumers may miss relevant information.

Consumers do not feel well informed that a product contains probiotics.

The survey results show that consumers across Europe are familiar with the word 'probiotic', but that they would like to know more.

In fact, the most relevant information is that in 7 out of 8 countries, consumers feel they are not informed about probiotics contained in products they find in shops. Poland is the only market with a bigger group of people feeling they are well informed (55% vs 45%), but even here, 45% of consumers would like to know more.

Probiotics are part of lactic bacteria or live bacteria, but not all live bacteria are probiotics.

Other terms such as 'live bacteria' or 'live cultures' are more known than the term 'probiotic'. This is probably due to the fact that the term 'probiotic' was not allowed in Europe since 2007³.

The traditional use of the term is also a factor that may influence the knowledge of probiotic-related terms in some countries. This is the case for Italy for example, where a very large part of Italian consumers are familiar with 'live cultures' (89%) associated with probiotic products.

When food and supplements with probiotics microorganisms are available in shops, 79% of all tested consumers indicate that they would like to see the term 'probiotic' on the packaging: e.g. the ingredients list or somewhere else on the packaging of food and food supplements, with Italy and Spain being the countries where the interviewed people feel the strongest about the indication on the labels (90%).

There is an opportunity to inform and further educate consumers about the beneficial role that probiotics can play in diet and well-being. Finally, the survey participants were asked what they think probiotics are useful for, and specifically "for what reasons do they consume probiotics", if they had previously indicated that they do consume them.

The result was that consumers are more informed about probiotics in countries that have allowed the use of the term for a longer period of time. Consumers mainly refer to probiotics mentioning their beneficial effect on bacterial flora, the stomach and digestion. Consumers who know what probiotic foods and food supplements are, and who also consume them, mention that their main driver is their overall health and well-being. Very often the guidance for using probiotics comes from healthcare professionals, which also explains why so many people are familiar with this category. However, they find no correspondence when looking at product labels on the market.



Focus on: SPAIN

Results for Spain show that almost half of the population panel consumes probiotics food and/or food supplements (44%), but even people that do not consume them know the word. In fact, two third of the population (67%) know what probiotics food and food supplements are.

Concerning the use of other terms, 72% of people are familiar with 'live bacteria', whereas 'live cultures' is known by 59%.

The markets that would like to see more information on the packaging are Spain and Italy (90%). In Spain, like in Italy, there are national guidelines indicating that the use of the term on labels and in communication is allowed, under certain conditions, for domestic and imported foods and food supplements containing probiotics.



Focus on: POLAND

Almost two third of the population panel in Poland consume probiotics food and/or food supplements (59%). Out of the 8 countries, the Polish people are the most aware of what probiotics are. In fact, most of the interviewees (78%) indicated that they know about probiotics food and food supplements.

As previously mentioned, Poland is also the only market with a majority of consumers feeling informed that a product contains probiotics (55% vs 45%). Even here, there is still a high proportion of consumers (45%) that would like to have more information.

Concerning the use of other probiotic-related terms, almost 9 out of 10 people are familiar with 'live bacteria' (87%), whereas 'live cultures ' is known by only 58%.

When asked if they would like to see the word probiotic on the packaging, 79% of the Polish panel answered 'yes'.



Focus on ITALY

Italy, together with the Spanish and Polish consumers, show a high percentage of probiotic consumption (41%). This percentage increased to 62% when the panel was asked if they knew what probiotics food and/ or food supplements are. A very large portion of the Italian population is also familiar with 'live cultures' (89%). This is also due to the traditional use of this term associated with the probiotic category of products and ingredients. The 'term live bacteria' is less used, only 55% of the consumer panel knows it

As mentioned in the focus on Spain, Italy is also in favour (90%) of having more information on probiotics on the packaging and in communication. Since 2013 Italy enforced national guidance on the use of the term probiotic,



Focus on DENMARK

Denmark stands out as only one-third of the Danish population knows what probiotics food and food supplements are, and 19% of the panel of consumers use probiotics food and/or food supplements.

Denmark also has the lowest percentage of the population that feels informed about probiotics in products (31%).

People in Denmark are more familiar with the terms 'live bacteria' (68%) and 'live cultures'(59%). This is also due to the national definition used in this country.

Concerning the appearance of the term probiotics on the packaging, 56% declared they would like to know more. This is a significant percentage if we consider the fact that until 2021 the term probiotic was banned, and Denmark was following the interpretation of the European Commission indicating that 'probiotic' could be used as a health claim only. Since 2021, Denmark recognises the use of the term referring to a category of ingredients in food supplements, and the authorities are in favour of a better European approach, a legal certainty and a harmonised way forward at the EU level.



Focus on SWEDEN

Half of the population of Sweden knows what probiotics food and food supplements are, but 76% of the Swedish panel are in favour of the information about the presence of probiotics on the packaging. Approximately one-quarter of the Swedish population consumes probiotics food and/or food supplements (27%).

Concerning the familiarity with terms, 3 out of 4 people are familiar with both 'live bacteria' (77%) and 'live cultures' (76%).

Sweden joined Denmark in June 2022 and the group of countries asking for a better approach for probiotics food and food supplements in the EU.



Focus on GERMANY

Probiotics are popular in Germany, despite the fact that this country was following the interpretation of the European Commission of the use of the term probiotic as a health claim only. In Germany, more than 60% of the German panel indicates that they know what probiotics food and food supplements are, and 38% answered that they consume probiotics food and/or food supplements.

Consumers are also familiar with the terms 'live bacteria (66%) and 'live cultures' (74%).

When asked if they would like to have the indication of probiotics on the packaging, 82% of the population panel responded favourably.



Focus on THE NETHERLANDS

Half of the population panel declares that they know what probiotics food and food supplements are. About 27% of the Dutch population consumes probiotics food and/or food supplements. In the Netherlands, other terms are also well known: 76% are familiar with 'live bacteria', whereas 'live cultures' is only known by 59%

When asked if they would like to have the term 'probiotic' listed on the packaging, 76% of the panel consumers responded favourably.

The Netherlands has a pragmatic approach, the term 'probiotic' is used as the name of the category on the label of probiotic food and food supplements.



Focus on BELGIUM

Half of the population panel declares that they know what probiotics food and food supplements are, and 29% of the Belgian panel stated that they consume probiotics food and/or food supplements. The low results are probably due to the strict approach of the authorities regarding the use of the term, which is currently allowed only for probiotic yoghurt.

Belgian people are familiar with 'live bacteria' (76%), whereas 'live cultures' is less common (52%).

A high percentage of consumers (83%) declared that they would be in favour of the appearance of the term 'probiotic' on the packaging.

Conclusion: the panel (8.000 consumers in 8 European countries) would like to be more informed about probiotics food. Also, consumers declare that they are better informed in countries where the term 'probiotics' is (partially) allowed by National guidance/standard: this is the case, for example, in Italy, Spain, and Poland. Very often, the guidance for using probiotics comes from health professionals, which also explains why so many people are aware of this category but find no match when looking at product labels.

The regulatory situation is influencing the European market. It is evident that the need for a coherent EU regulatory approach for probiotics goes hand in hand with the opportunity to further educate consumers on the correct use of these micro-organisms. The high level of uncertainty for most probiotic health claims found online hinders the rational use of probiotics, leaving the field open to unsubstantiated allegations and misuse.

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