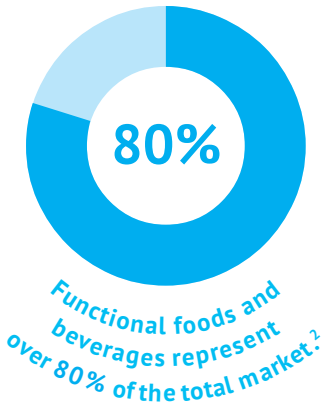


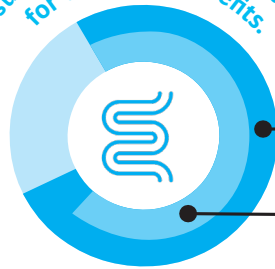
# A GLOBAL LOOK AT THE DIGESTIVE AND PROBIOTIC MARKETS

## Global Market Growth

The global probiotics market is projected to grow to **\$64 billion** at a CAGR of 7% from 2017 to 2022.<sup>1</sup>



Consumers are turning to probiotics for digestive benefits.



- 76% of US consumers are aware of probiotics.
- 93% of these consumers are aware that probiotics can support digestive health.<sup>3</sup>

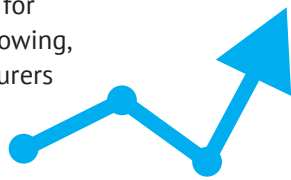
### What's driving probiotic market growth in the food & beverage industry?

Consumer demand for digestive health benefits.

- Global food & beverage launches with digestive health-related claims between 2012 and 2016 have a positive **25%** CAGR.<sup>4</sup>

## Regional Market Drivers

**North America** Demand for digestive-related products is growing, and food & beverage manufacturers are aggressively responding.



In Canada, foods and beverages fortified with probiotics are expected to grow at a CAGR of **6.6%** through 2022.<sup>6</sup>

- The market for digestive products grew 12% between 2012 and 2017.<sup>5</sup>

**Europe** Consumer demand and overall interest in probiotics for digestive health remains strong.



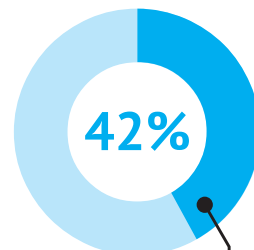
Europe is the second-largest food and beverage probiotic market.

- Europe is second to the Asia Pacific region in the number of foods and beverages launched over the past year with a digestive health claim.<sup>7</sup>

**Latin America** An expanding middle class has driven growth in digestive and probiotic sales.



- Brazil is the fastest-growing regional market for probiotics in Latin America.
- Brazil leads the probiotic market with an estimated share of **52%** in 2016 and a forecast CAGR of about **11%** between 2017 and 2022.<sup>8</sup>



42% of Chinese consumers buy beverages marketed as having digestive benefits.<sup>9</sup>

**Asia** Probiotics are well established for their health benefits, with opportunities for digestive health and probiotic products for children and older adults.

- China leads the probiotic market with an estimated 35.4% market share.<sup>10</sup>

## Global Food & Beverage Innovation Opportunities

Global market demands provide opportunities to create unique digestive and probiotic products including better-for-you snacks, baked goods, bars, hot beverages, dairy and nondairy beverages, and frozen goods.



### How can food & beverage manufacturers capture global demand for probiotics?



- Start with product diversification – including exploring new food and beverage formats.



- Look for probiotics supported by clinical research that supports efficacy.



- Source research-backed spore-forming probiotics for manufacturing and shelf stability.

GanedenBC<sup>30</sup>® (*Bacillus coagulans* GBI-30, 6086) is a spore-forming, patented probiotic ingredient that can be formulated into many food, beverage and companion animal products. Backed by over 25 published papers, GanedenBC<sup>30</sup> has an exceptional safety record with FDA GRAS status from the United States FDA. Part of Kerry's nutrition and wellness portfolio, GanedenBC<sup>30</sup> is natural, vegan, Non-GMO Project verified, organic compliant and allergen-free. For more information, please visit [GanedenBC30.com](http://GanedenBC30.com).



1, 2, 4, 6, 8 MarketsandMarkets, Sept. 2017  
 3 Kerry 2017 Survey Sampling International (SSI) Consumer Survey, 2017  
 5 FONA International report, 2017  
 7 Mintel GNPD Analysis 2013–2017  
 9 Mintel, 2017  
 10 Modar Intelligence, 2017