**Probiotics Success Strategies in Food and Drinks: Novel Applications, Future R&D and Consumer Engagement**

The application of probiotics has extended to a wide range of delivery formats in food and drinks, which are marketed on multiple health-enhancing platforms. As the level of scientific knowledge about the use of foods offering health benefits increases, consumers will increasingly search out new products promising additional advantages beyond taste and convenience.

**Scope**

- Analysis of the emerging roles that probiotics are playing in health and disease treatment.
- Insights into the current marketing and formulation strategies of the leading probiotic products and brands.
- A review of legislation and litigation currently impacting the marketing of probiotic-based foods and beverages within the EU and US.
- Market forecasts for probiotic-based food and drinks for the US, EU countries and Japan.
- Detailed analysis of category-defining probiotic products, and the lessons that could be learned from their successes and failures.

**Research and analysis highlights**

For manufacturers willing to invest a significant portion of their R&D budget in the health claims assessment process within the EU, success will offer a significant competitive advantage given the number of rejected claims so far. Kraft's attempt to extend the US probiotic market has been unsuccessful. Although Kraft's expertise lies in formulation and distribution, it overlooked some key success factors for the functional food category. Danone was able to capitalize on the US market and avoided making mistakes.

Yakult has been successful for many reasons, including its focus on a single health message, its long-term investment in functional drinks, and especially its direct-to-consumer approach to selling.

**Key reasons to purchase this research**

- Assess the latest applications for human health of probiotics and which products are already capitalizing on these.
- Discover which probiotics markets have helped shape the sector through both success and failure.
- Benefit from the lessons to be learned from 11 of the most innovative products in the probiotic category.
- Analyze the major countries of the sector and determine which will continue to grow and which will slow down over the next four years.
- Identify the five key factors that can help the successful development and launch of functional foods and beverages utilizing probiotics.
# Table of Contents

Probiotics Success Strategies In Food and Drinks Executive summary 10  
Introduction to probiotics 10  
Regulatory perspectives of the probiotic market 11  
Market analysis of the global probiotic category 12  
Product analysis – Insights from brand successes and failures 13  
The probiotic principles for success 14  
Chapter 1 Introduction 16  
Summary 16  
Research methods and report structure 17  
Report structure 17  
Chapter 2 Health benefits 20  
Summary 20  
What is a probiotic? 21  
Commercial origins 22  
The science of probiotics 23  
Gut health 24  
Immune support 25  
Skin health 26  
Nutrient absorption 28  
Novel research 29  
Allergies 30  
Chronic fatigue 32  
Depression 33  
Obesity 33  
Urinary tract infections 35  
Type of probiotic strain – Does it matter? 36  
An issue of stability – Do probiotics need to be alive? 37  
Chapter 3 The probiotics regulatory environment 40  
Summary 40  
Regulatory landscape in the EU the US 41  
Enforcing consumer rights in the US 41  
Enforcement – Class action leads the way in 2009 and 2010 44  
Hard times for the EU probiotic market 45  
EFSA and probiotics 46  
The future of regulation 47  
Chapter 4 Global market analysis 50  
Summary 50  
Introduction 51  
Category growth 53  
Europe – market size, growth and forecast to 2013 54  
US – market size, growth and forecast to 2013 55  
Japan – market size, growth and forecast to 2013 56  
Chapter 5 Product analysis – brand successes and failures 58  
Summary 58  
Introduction 59  
Failures in the probiotic market 59
List of Figures
Figure 2.1: Number of probiotics research publications, (1990-2009) 23
Figure 2.2: Racconto Essentials Digestive Health All Natural Pasta with GanedenBC30, a patented probiotic strain developed by Cleveland, OH based Ganeden Biotech, Inc 24
Figure 2.3: Dukat Bio Aktiv LGG 26
Figure 2.4: Age Defence dietary supplement from Nude Skincare containing probiotics and a blend of nutrients 27
Figure 2.5: Koiwai KW Nyusankin yogurt from Koiwai Nyugyo, contains the Lactobacillus paracasei KW3110 strain of bacteria with anti-allergy properties 31
Figure 2.6: Natren Healthy Tummy Dieter’s Probiotic chewable supplement wafers from Natren Inc, claim to suppress appetite and reduce effects of over indulgence. 35
Figure 2.7: Fem Dophilus from Jarrow Formulas Inc 36
Figure 4.8: Probiotic market value by country ($m), 2008 51
Figure 5.9: LiveActive cheese strings and granola bars from Kraft Foods 60
Figure 5.10: Dancing Daisy Probiotic drink from St Helen's Farm 62
Figure 5.11: LC1 Go! from Nestlé 64
Figure 5.12: Yakult probiotic drink from Yakult Honsha Co. Ltd 66
Figure 5.13: Actimel from Danone 69
Figure 5.14: ProViva range by Probi 71
Figure 5.15: BLIS Throat Guard from BLIS Technologies 75
Figure 5.16: Bravo Friscus from Skånemejerier 77
Figure 5.17: Galaxy Probiotic chocolate mini drink from Mars Inc 79
Figure 5.18: Walls Milk Time ice lolly from Unilever 81
Figure 5.19: Lätta mit Probiotik spread from Unilever 83
Figure 5.20: Unilever’s Healthy Choice logo 83

List of Tables
Table 4.1: Sales and CAGR of the probiotic market, by country ($), (2003-2013) 52
Table 4.2: Sale per capita and CAGR of the probiotic market, by country ($), (2003-2013) 53
Table 4.3: Share of products launched, by category (%), 2006-2009 54
Table 4.4: Share of probiotic products launched, by region, (2006-2009) 55