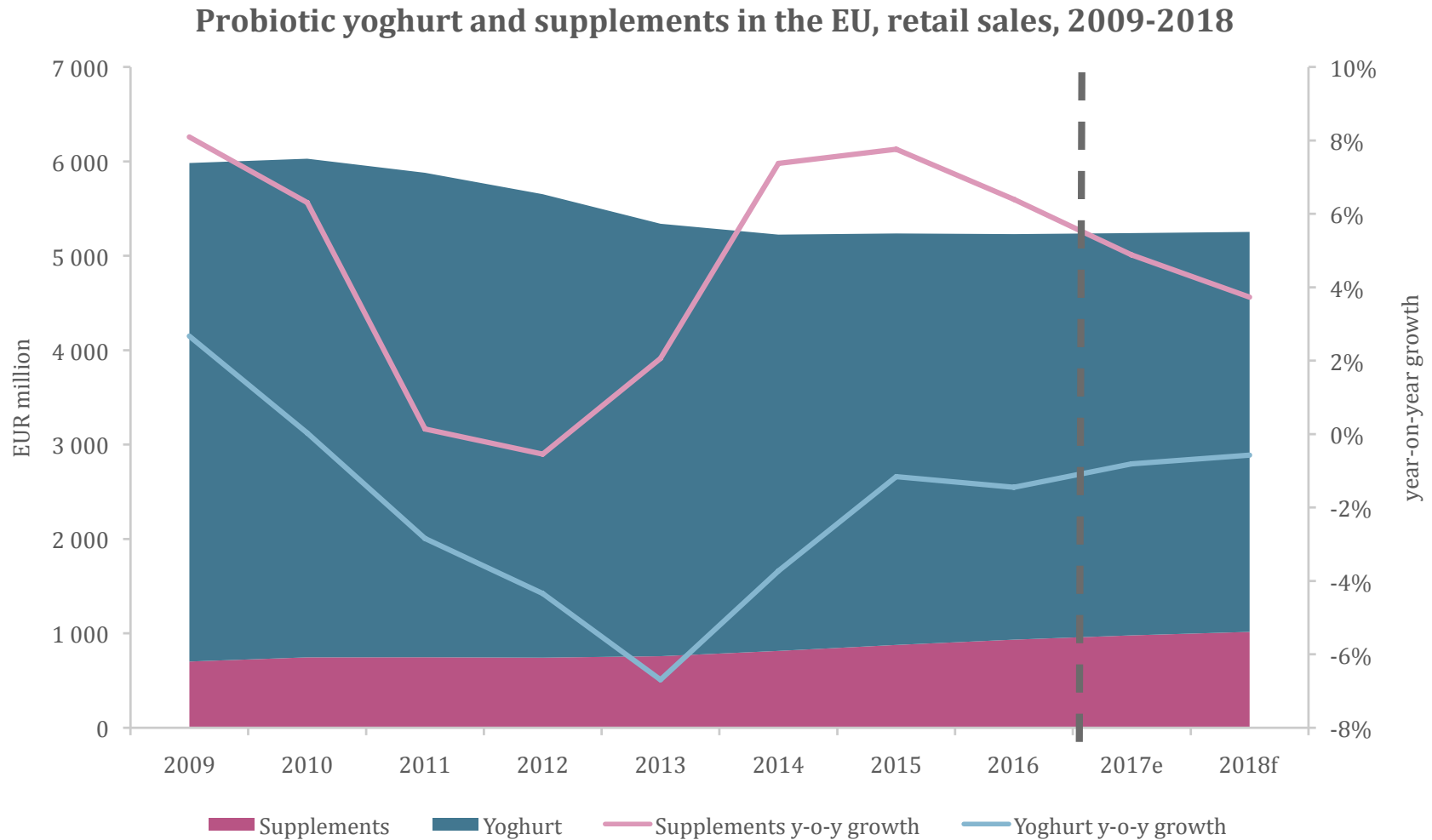




## Probiotic yoghurt and supplements: Retail sales in the EU

# Supplements and yoghurts to record 4%, and -1% growth over 2017-2018

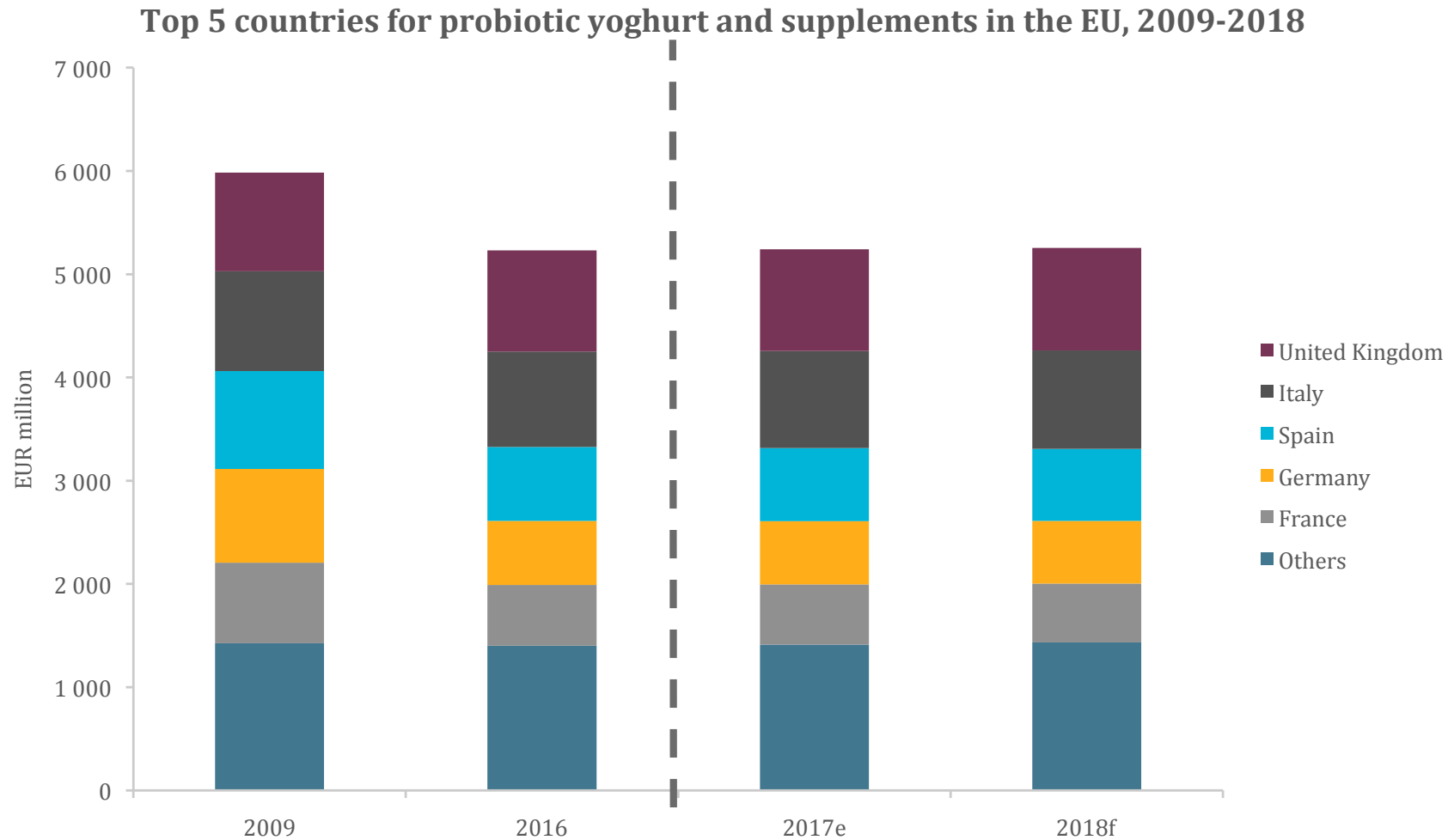


Source: Euromonitor International  
2017e – estimated market size, 2018f – forecasted market size



## Probiotic yoghurt and supplements: Top 5 countries in the EU

UK and Italy contribute 36% of total probiotics sales in the EU



Source: Euromonitor International  
2017e – estimated market size, 2018f – forecasted market size

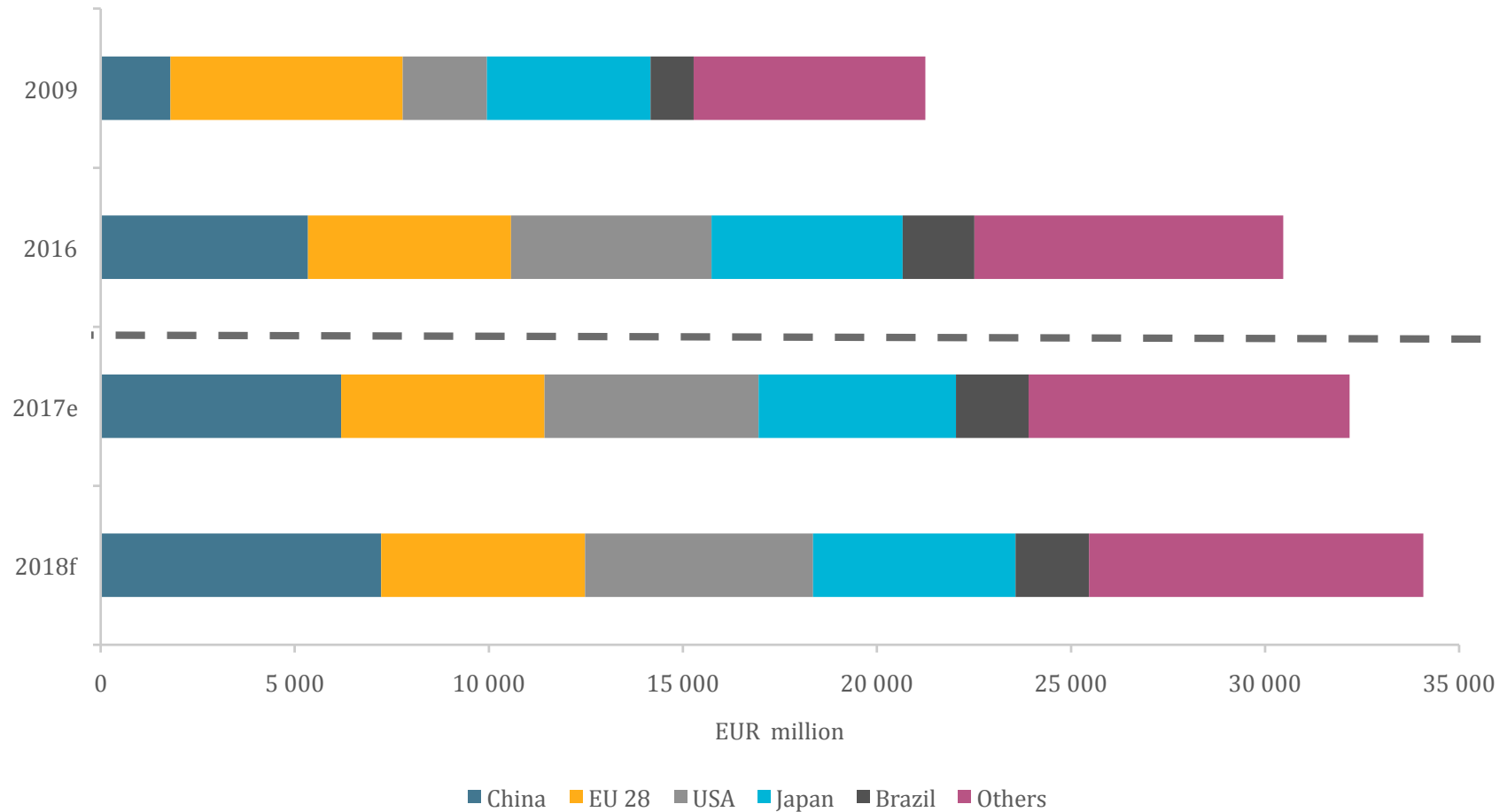




## Probiotic yoghurt and supplements: EU compared to the largest countries in the world

# EU 28 ranks third in probiotic yoghurt and supplement sales in 2016

### Top markets for probiotic yoghurt and supplements globally, 2009-2018



Source: Euromonitor International  
2017e – estimated market size, 2018f – forecasted market size

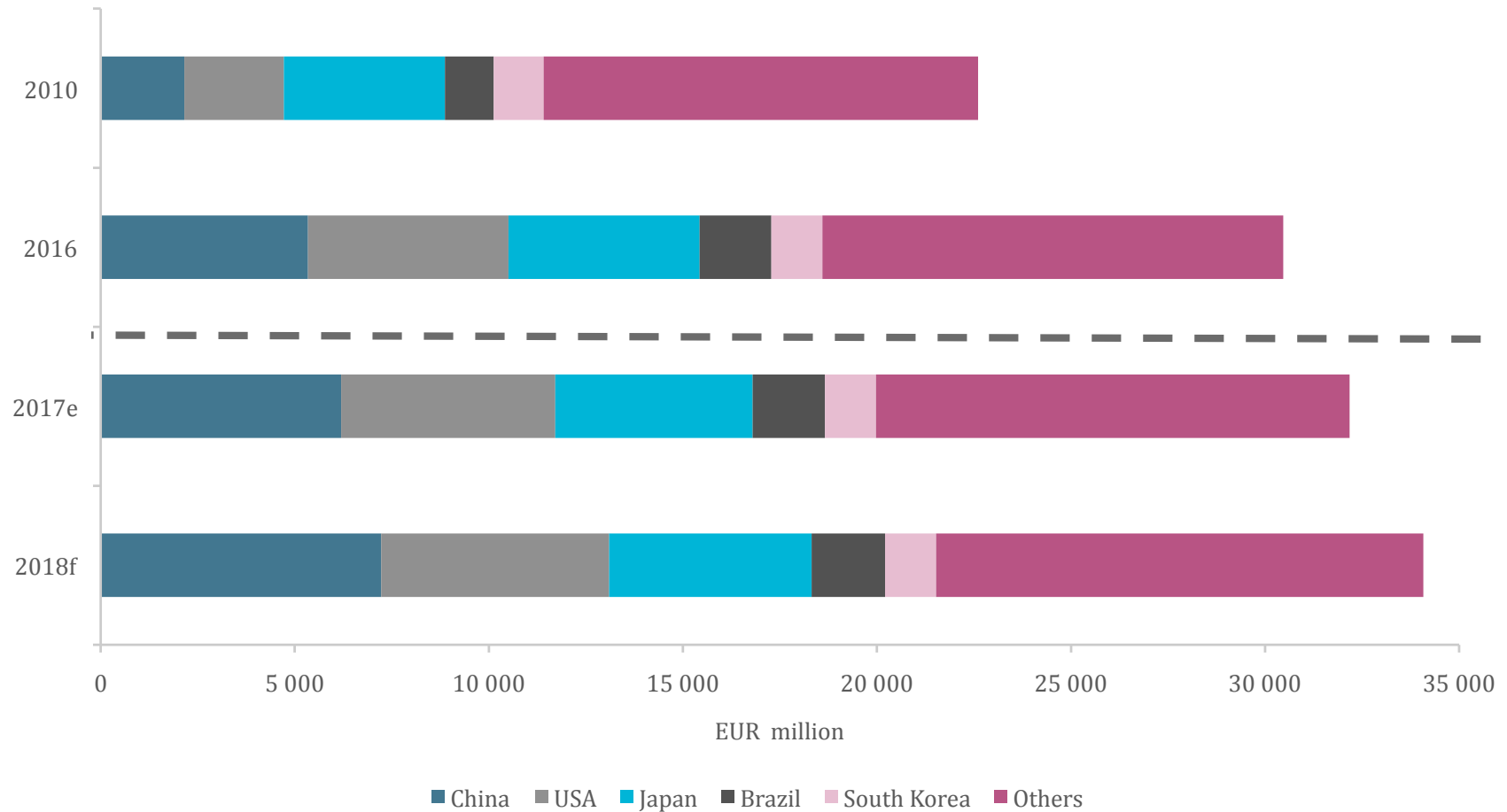




## Probiotic yoghurt and supplements: Top 5 countries in the world

# China is expected to lead probiotic yoghurt and supplements sales in 2018

### Top 5 countries for probiotic yoghurt and supplements globally, 2009-2018



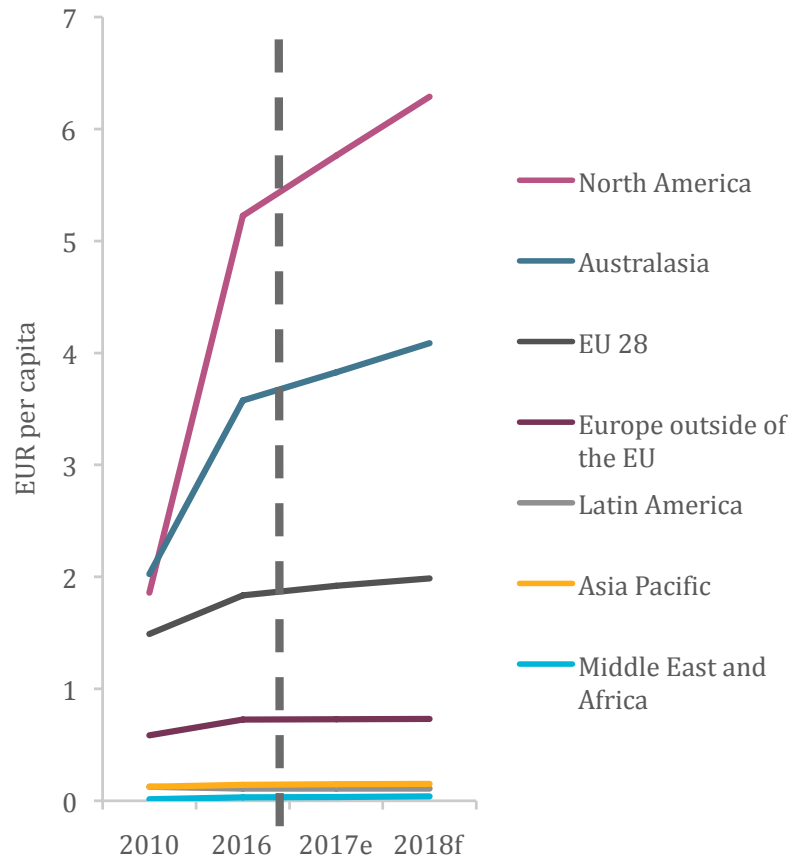
Source: Euromonitor International  
2017e – estimated market size, 2018f – forecasted market size



Probiotic yoghurt and supplements: Per capita spend in Europe as compared to the world

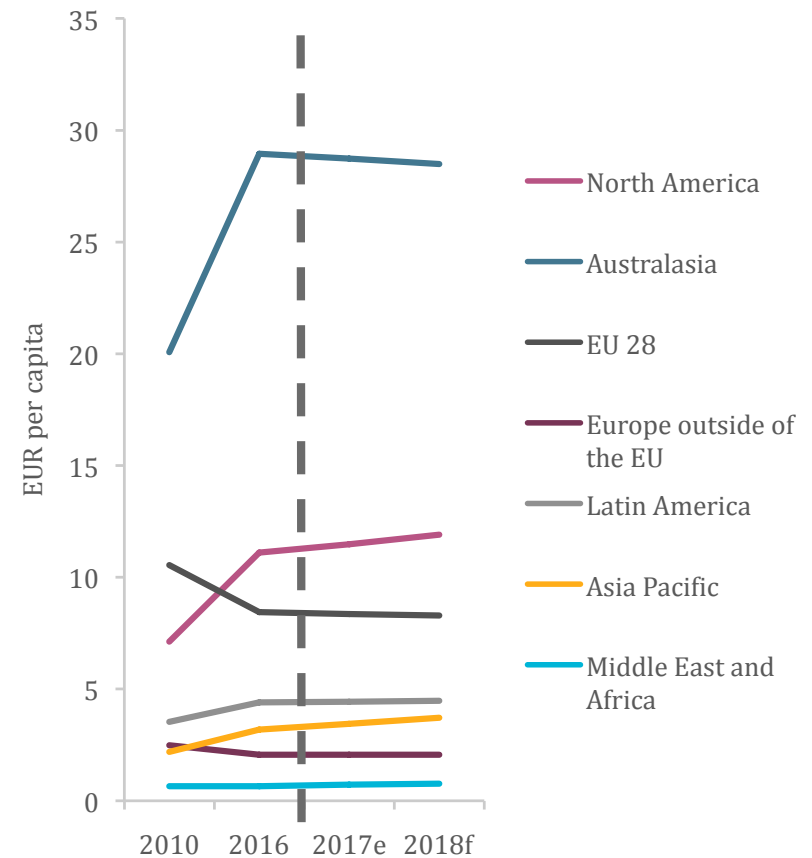
North America, and Australasia lead in euro spend per capita, in probiotics

Probiotic Supplements - retail sales by region, 2010-2018



Source: Euromonitor International  
2017e – estimated market size, 2018f – forecasted market size

Probiotic Yoghurt - retail sales by region, 2010-2018



Source: Euromonitor International  
2017e – estimated market size, 2018f – forecasted market size





## 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 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 supplements

- 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.

