

FMCG Gurus

What Next for Probiotics in 2023

February 2023



Consumer Experts, Insight Driven

FMCG Gurus: Introduction

Who are FMCG Gurus

- ▶ **FMCG Gurus provides market research and insight into consumer attitudes and behaviours across the food, beverage, and supplement markets around the world. FMCG Gurus are dedicated to being a world leader in consumer insights and market research.**





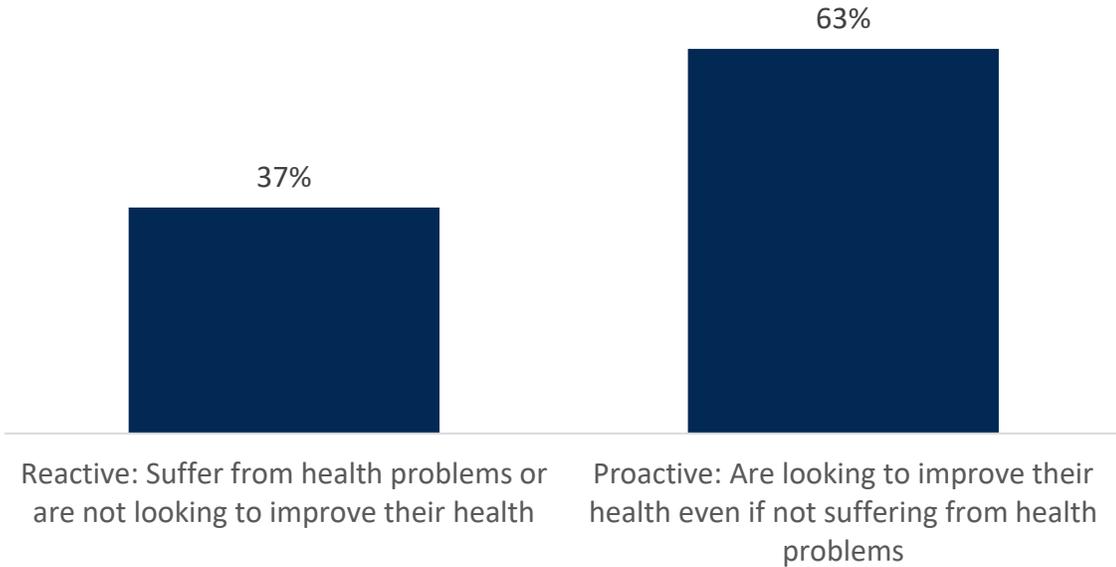
Consumers will continue to take a proactive approach to wellness in 2023



Although fear of illness is fading, consumers remain mindful of well-being

Classification of consumers in terms of their attitude. 2023

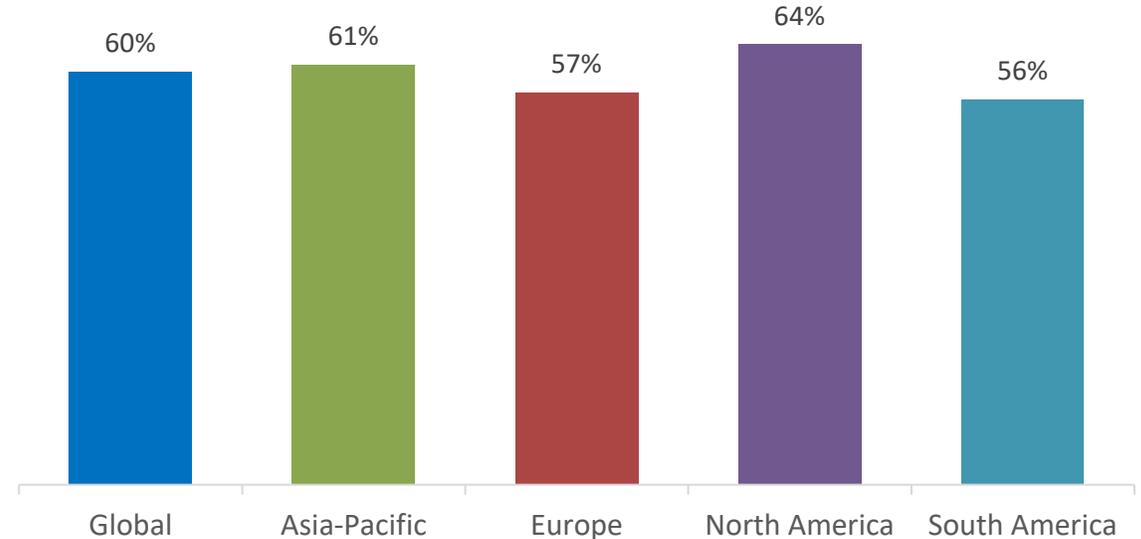
Global



Consumers are taking a proactive and long-term approach to health maintenance.

Over the last couple of years, consumers have re-evaluated their health and wellness.

The proportion of consumers who have become more conscious about preventing health problems by leading a healthy lifestyle. 2022



Although fear of disease is fading, consumers remain committed to prevention over cure.

This is something that will drive demand for functional products that carry active health benefits.



Consumers are self-educating about wellness and taking a greater interest in functional ingredients



Greater emphasis is being placed on long-term wellness

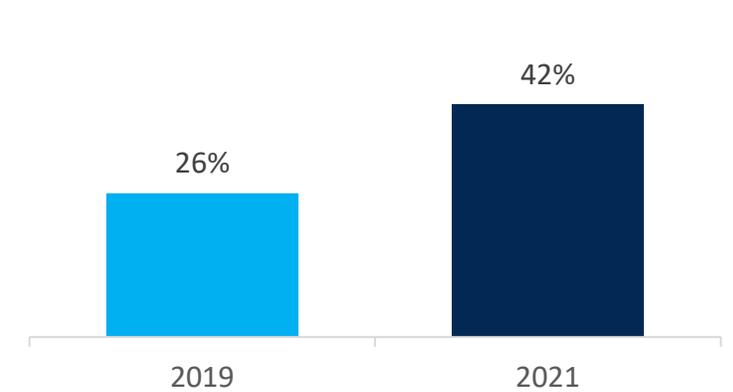
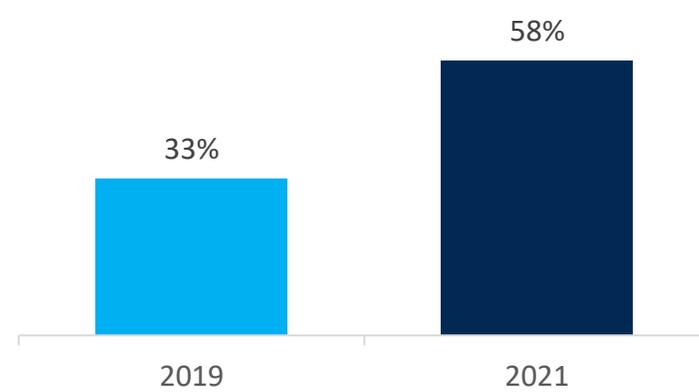
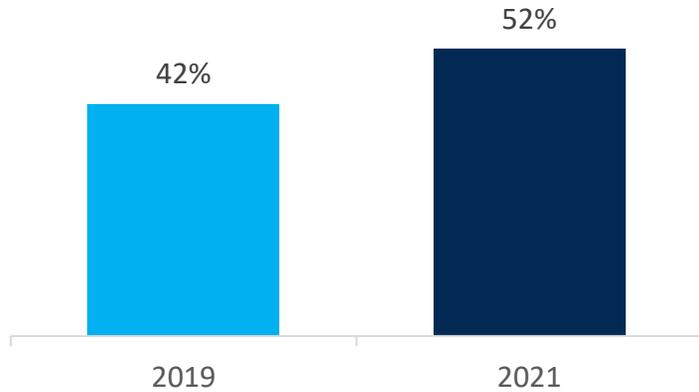
In the last two years, have you tried to do any of the following?

Global

Adopted a more long-term approach to health

Educated myself more about my health

Taken a greater interest in ingredients in food and drink that are known to boost health



Consumers are adopting a long-term approach to health and looking to break age-related stereotypes.

Consumers are embracing the concept of positive nutrition from an ingredient perspective.

Ingredients that aid overall health and wellness will appeal to proactive consumers.

At the same time, consumers will want reassurance that products are safe to use.

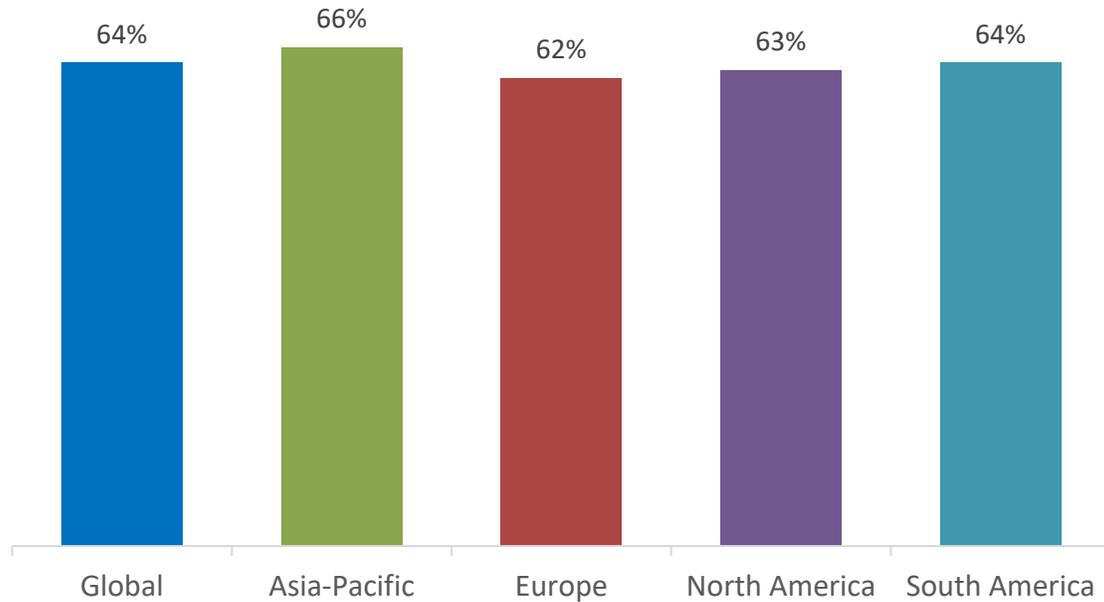


Two-thirds of consumers say they have purchased probiotics in the last twelve months



Dairy remains the most popular type of probiotic product

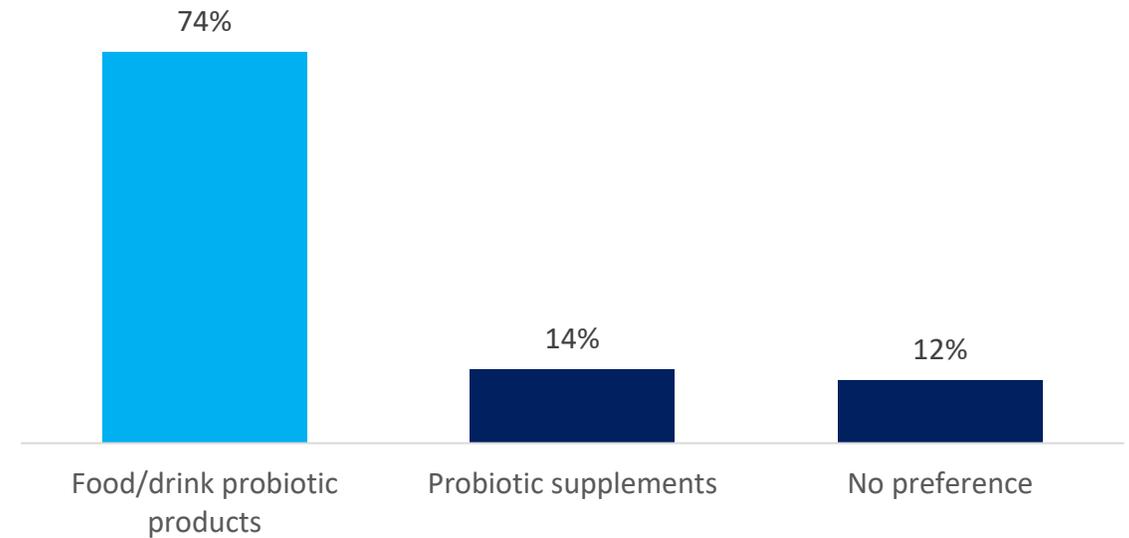
The proportion of consumers who say that they have purchased a probiotic product in the last twelve months. 2022



There are wide levels of awareness and acceptance of probiotic products around the globe.

Food and drink products are associated with being tastier, natural and affordable.

What type of probiotic product do you prefer? 2022 **Consumers that say they purchase multiple types of probiotic products - Global**



Although dairy remains most popular option, the plant-based market is growing.

Supplement brands need to do more to offer reassurance around value for money.



Most consumers were not suffering symptoms when they started using probiotics



This shows how consumers are focused on prevention over cure

What symptoms were you experiencing when you first consumed probiotics? 2022

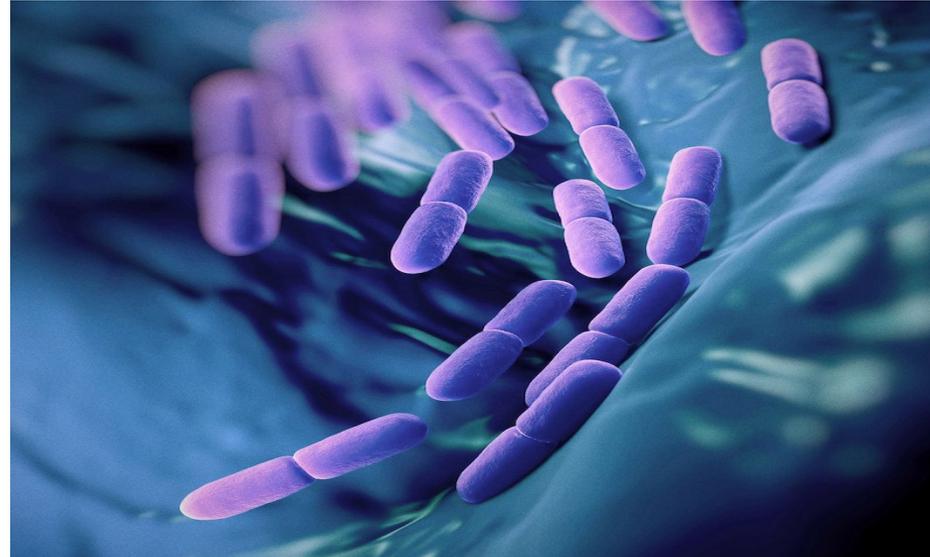
Global – Consumers who purchase probiotics

Abdominal pains: 13%

Bloating: 17%

Constipation: 7%

Diarrhea: 8%



Gas: 13%

Heartburn/indigestion: 4%

Skin problems: 3%

Vaginal discomfort: 3%

I was not experiencing any symptoms: 51%

Most consumers started using probiotics even though they were not suffering symptoms.

This means it is crucial that products are deemed to be hassle-free and compromise-free.

Digestive issues are the main symptom that drives people to use probiotic products.

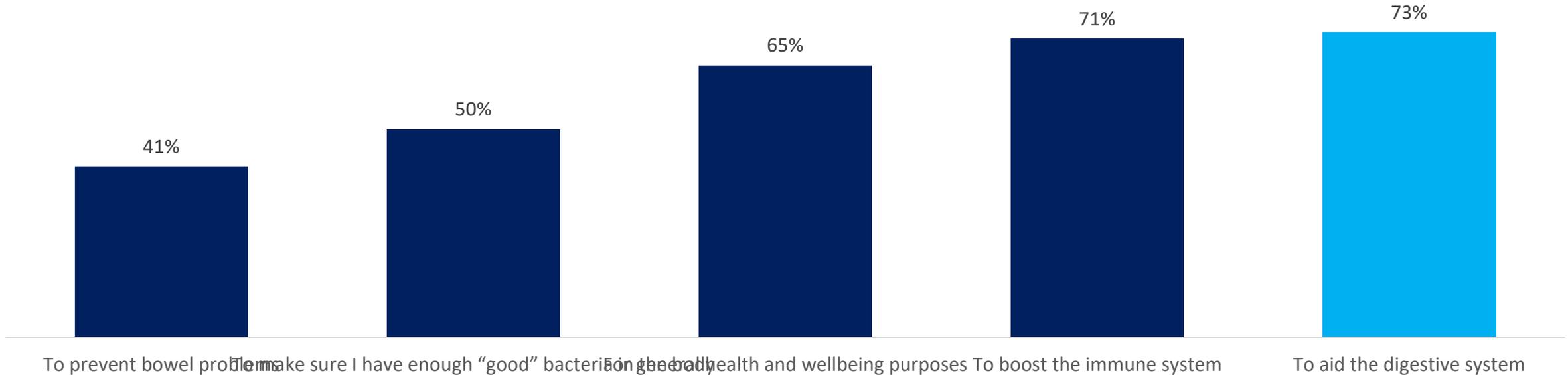
Brands can do more to raise awareness of the additional benefits of probiotics.



Consumers are most likely to turn to probiotics to aid immunity and digestive health

Consumers also associate probiotics with holistic health

Why do you purchase/use probiotic products? 2022
Global - Top ten reasons – Consumers who purchase probiotics



Probiotics are most likely used to aid the digestive system and aid immune health.

Digestive health and immunity are seen to be interlinked by most consumers.

However, probiotics are something that are seen to help facilitate holistic health and well-being.

Multifunctional benefits are associated with maximum efficacy, convenience, and value.



Brands need to provide evidence to support health claims made where possible



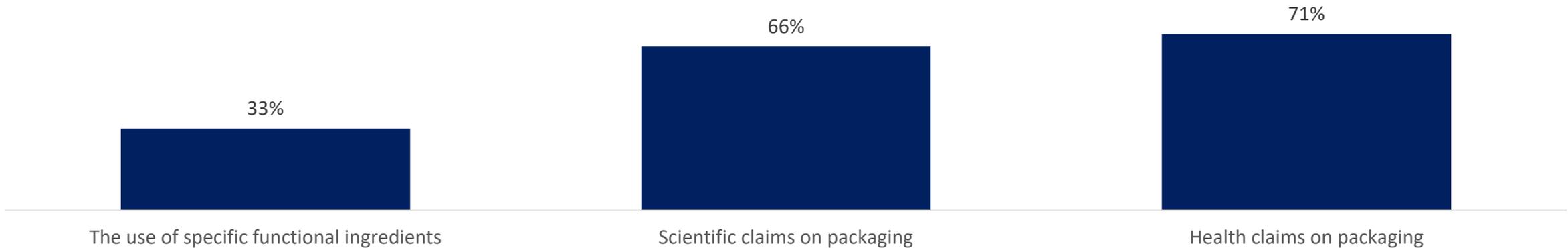
Efficacy is synonymous with value

The proportion of consumers who say clinical evidence on probiotic packaging to support health claims made is important. 2022
Consumers who have purchased



What type of clinical evidence do you like to see? 2022

Global – Consumers who say that clinical evidence is important to support health claims



Consumers can be skeptical of the claims made by health and wellness brands.

Brands need to validate claims made and provide clinically proven evidence where possible.

Brands can use this as an opportunity to further educate consumers about probiotics.

It is worth noting that free-from claims are just as important when purchasing probiotics.

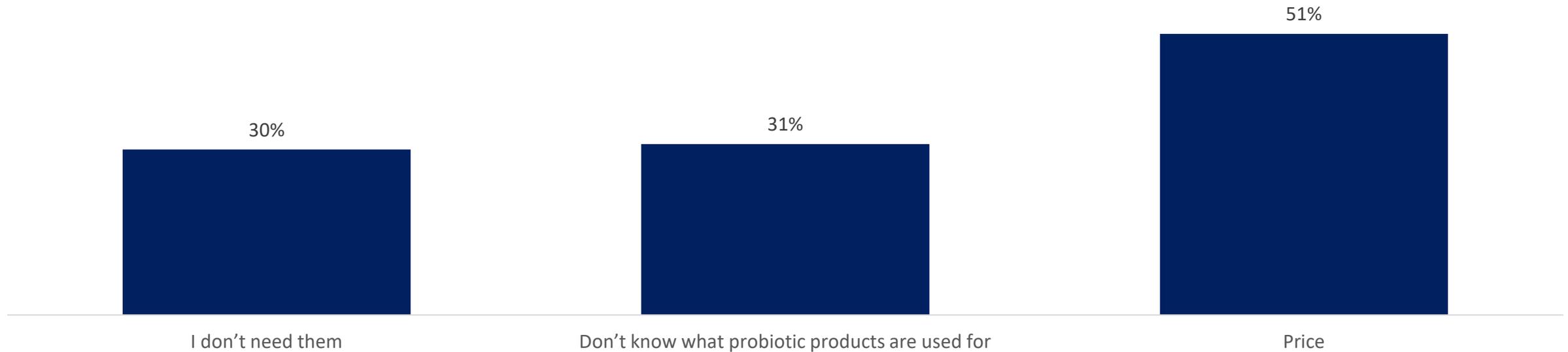


More can be done to educate consumers about the benefits of probiotics



Brands need to encourage consumers to take a proactive approach to wellness

Why have you not purchased probiotic products? 2022
Consumers who have not purchased probiotics in the last 12 months
Global



Price is something that will be a barrier to purchasing in a recessionary environment and price sensitivity.

Some consumers can lack awareness about the benefits of probiotics and why they need them.

Further education on the subject is something that can help reduce levels of price sensitivity.

Brands also need to educate consumers about the difference between probiotics and prebiotics.

The appeal of probiotics will continue to grow as more becomes known about the gut microbiome



Digestive health problems are common across the globe

Digestive health problems are common across the globe, partly due to lifestyle choices.

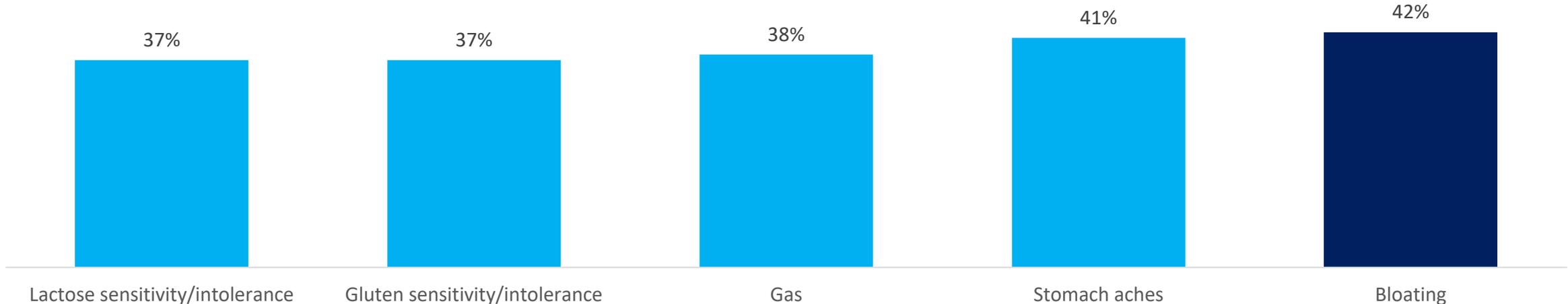
Consumers recognize the immediate and long-term health risks associated with a poor gut.

Over the next ten years, more consumers will be aware of the gut microbiome.

This is something that will drive urgency over addressing digestive health issues.

15% of global consumers say that they have heard of the microbiome or gut microbiome/microbiota. 2022

The proportion of consumers who say they suffer from the following digestive health problems at least some of the time. 2022 Global – Top five answers





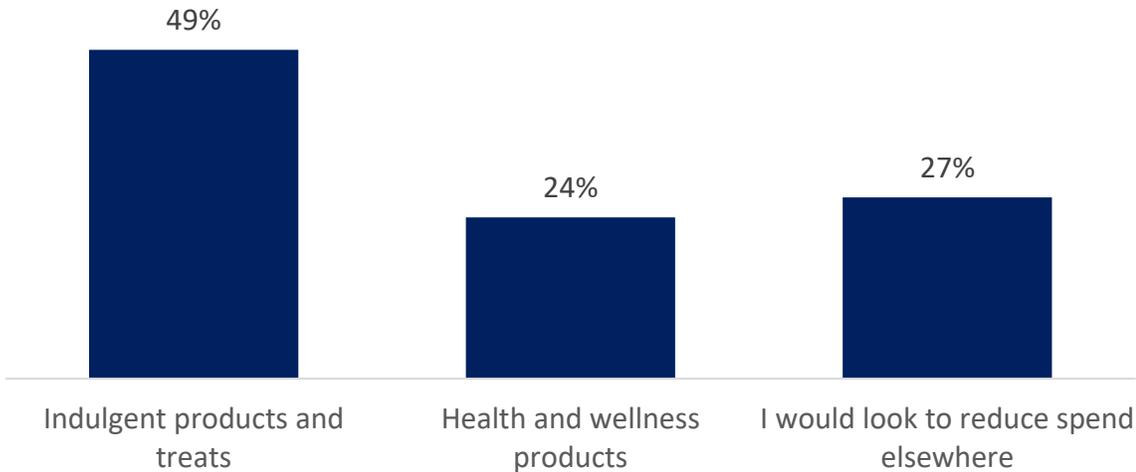
Consumers will continue to take a proactive approach to wellness in 2023



However, health will remain a priority for consumers in 2023

If you have to reduce spend on products over the next twelve months, which type of product are you most likely to reduce spending on? 2023

Global

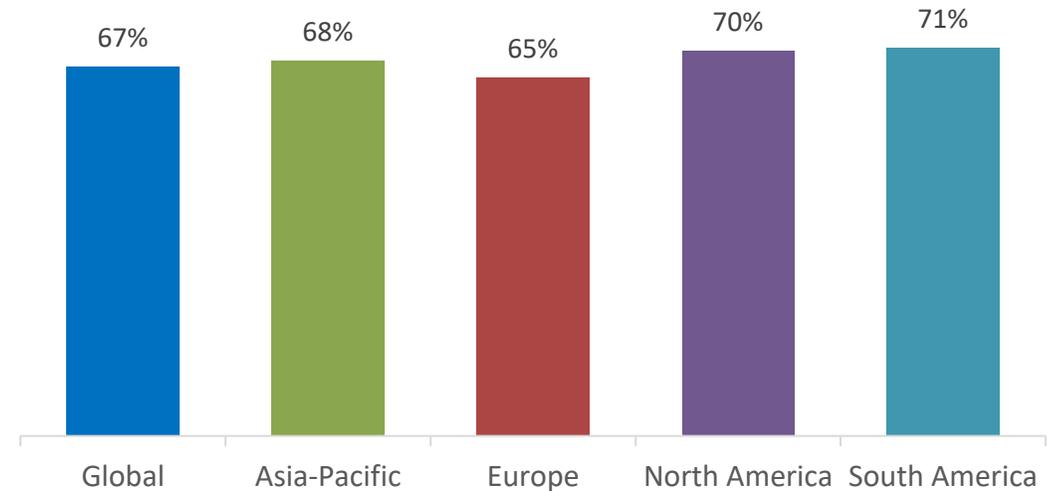


The health and wellness industry needs to be mindful of the impact of cost-of-living crisis.

However, consumers will continue to take a proactive approach to health and wellness.

The proportion of consumers who say that they are concerned about rising living costs in their country of residence. 2023

2023



Efficacy is more important than low cost when determining good value for money.

Transparency, convenience, and sensory appeal also shape perceptions of value amongst consumers.



Over the next twelve months, consumers will continue to take a proactive approach to health as they look to stay fit and active until as late in life as possible

Consumers are taking an interest in functional ingredients and products that they associate with helping aid overall health and wellness as they focus on prevention over cure

Although the cost-of-living crisis will impact the industry, brands need to focus on offering maximum value as opposed to the cheapest priced product

Probiotics need to be deemed to be compromise-free and hassle-free

There is an opportunity to further educate consumers about dosages, and wider benefits associated with probiotics

Brands need to provide scientific evidence where possible to support health claims made

Green and clean claims are just as important as functional claims

Increased awareness of the gut microbiome will further enhance appeal of probiotics over the next five years

Get in Touch!



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