

# **Synbiotic Food Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application**

<https://marketpublishers.com/r/S727FE63D8C2EN.html>

Date: May 2025

Pages: 92

Price: US\$ 3,200.00 (Single User License)

ID: S727FE63D8C2EN

## **Abstracts**

### **Synbiotic Food Market Summary**

#### **Introduction to the Synbiotic Food Industry**

Synbiotic foods combine live microorganisms (probiotics) and substrates selectively utilized by host microbes (prebiotics) to confer health benefits, as defined by the International Scientific Association for Probiotics and Prebiotics (ISAPP) in 2019. These products target gut health, immunity, and overall wellness, appealing to consumers seeking functional foods with scientifically backed benefits. Synbiotics are delivered in formats like yogurts, beverages, gummies, and supplements, leveraging advancements in microbial science and delivery systems. The industry is highly fragmented and competitive, driven by rising consumer awareness of microbiome health, increasing demand for personalized nutrition, and innovations in encapsulation and stability technologies. Unlike standalone probiotics or prebiotics, synbiotics offer synergistic effects, enhancing microbial survival and efficacy in the gut. Recent developments, such as gummy-based synbiotics and postbiotic integration, reflect the industry's focus on convenience and novel formats. Regulatory frameworks vary globally, with stringent standards in Europe and evolving guidelines in Asia, influencing product development and marketing strategies.

#### **Market Size and Growth Forecast**

The global synbiotic food market is projected to reach USD 5.5 billion to USD 6.5 billion by 2025, with an estimated compound annual growth rate (CAGR) of 10% to 12% through 2030, driven by growing health consciousness, expanding retail channels, and

innovations in product formulations.

## Regional Analysis

North America is expected to exhibit a growth rate of 9% to 11%. The U.S. leads due to high consumer awareness of gut health, robust demand for functional foods, and widespread availability through pharmacies and online platforms. Canada's market is growing steadily, supported by wellness trends and regulatory clarity on health claims.

Europe anticipates a growth rate of 10% to 12%. Germany, France, and the UK dominate, driven by stringent regulations ensuring product efficacy and consumer trust in functional foods. Scandinavia emphasizes clean-label and organic synbiotics, aligning with sustainability trends.

Asia Pacific projects a growth rate of 12% to 14%. Japan's established probiotic culture, led by brands like Yakult, drives synbiotic adoption, while China's rising middle class and health-focused millennials fuel demand. India's market is emerging, with growth in urban areas due to increasing dietary supplement use.

South America expects a growth rate of 7% to 9%. Brazil's expanding health food sector supports synbiotic growth, though economic volatility limits scalability.

Middle East and Africa anticipate a growth rate of 6% to 8%. The UAE and South Africa show potential due to growing retail infrastructure, but limited awareness hinders broader adoption.

## Application Analysis

**Pharmacy:** Projected at 10% to 12%, pharmacies dominate due to consumer trust in health-focused retail and professional endorsements. Trends include targeted synbiotics for specific conditions like IBS, with brands like Ritual emphasizing transparency.

**Supermarket:** Expected at 9% to 11%, supermarkets benefit from mass-market accessibility and diverse product formats like yogurts and beverages. Danone's fortified dairy products lead, with private-label synbiotics gaining traction.

**Convenience Store:** Anticipated at 7% to 9%, convenience stores cater to on-the-go consumers, with portable formats like synbiotic drinks and gummies. Yakult's single-serve beverages exemplify this trend.

Online Sales: Projected at 12% to 14%, online channels are the fastest-growing, driven by e-commerce platforms and direct-to-consumer models. Seed's subscription-based synbiotics leverage digital marketing and consumer education.

### Key Market Players

Danone: A French leader, Danone produces synbiotic yogurts and beverages.

Yakult Honsha: A Japanese firm, Yakult develops probiotic drinks for Asia.

Priegola: A European company, Priegola focuses on plant-based synbiotics.

GT's Living Foods: A U.S. firm, GT's scales kombucha with synbiotic properties.

Honest Tea: A U.S. company, Honest Tea offers synbiotic-infused beverages.

Sabinsa: A U.S. firm, Sabinsa supplies synbiotic supplements for pharmacies.

Probiotal: An Italian company, Probiotal develops targeted synbiotic strains.

United Naturals: A U.S. firm, United Naturals focuses on gut health supplements.

Synbiotic Health: A U.S. company, Synbiotic Health advances personalized synbiotics.

Seed: A U.S. firm, Seed offers subscription-based synbiotic capsules.

Ritual: A U.S. company, Ritual develops e-commerce synbiotic supplements.

### Porter's Five Forces Analysis

Threat of New Entrants: Moderate. High R&D costs and regulatory hurdles deter entry, but declining production costs and consumer demand lower barriers. Established players like Danone leverage brand loyalty and scale, though startups like Synbiotic Health capitalize on niche innovation.

Threat of Substitutes: High. Probiotics, prebiotics, and functional foods compete directly, with consumers often unaware of synbiotics' synergistic benefits. Yakult faces competition from non-synbiotic health drinks, though scientific

validation strengthens synbiotics' position.

**Bargaining Power of Buyers:** High. Consumers and retailers have significant leverage due to the fragmented market and diverse product options. Price sensitivity in supermarkets pressures Priegola, but premium branding in pharmacies stabilizes demand.

**Bargaining Power of Suppliers:** Moderate. Suppliers of microbial strains and prebiotic fibers influence costs, but diversified sourcing by Sabinsa mitigates risks. Specialized ingredients grant some supplier power, particularly in Europe's regulated markets.

**Competitive Rivalry:** High. Danone, Yakult, and Probiotal compete on innovation, branding, and distribution. Rapid consumer trends toward personalized nutrition and novel formats like gummies drive R&D, intensifying rivalry.

## Market Opportunities and Challenges

### Opportunities

**Rising Health Awareness:** Growing consumer focus on gut health and immunity boosts demand for Danone's synbiotic yogurts.

**E-Commerce Growth:** Online platforms enable Seed's subscription models to reach global consumers efficiently.

**Personalized Nutrition:** Advances in microbiome research support Ritual's targeted synbiotic formulations.

**Novel Formats:** Gummies and beverages, like TopGum's Gummiotics, appeal to younger demographics.

**Emerging Markets:** India's urban health trends offer export potential for Sabinsa's supplements.

**Sustainability Trends:** Eco-friendly packaging and organic synbiotics align with GT's Living Foods' ethos.

**Regulatory Support:** Europe's clear health claim guidelines bolster Probiotal's market credibility.

## Challenges

**Regulatory Variability:** Diverse global standards increase compliance costs for Yakult's international expansion.

**Consumer Awareness:** Limited understanding of synbiotics' benefits slows adoption in Africa, impacting United Naturals.

**High R&D Costs:** Developing stable, effective formulations pressures Synbiotic Health's profitability.

**Competition from Substitutes:** Probiotics and functional foods challenge Danone's market share.

**Supply Chain Volatility:** Microbial strain shortages disrupt Priegola's production.

**Counterfeit Products:** Online sales expose Ritual to risks of low-quality imitations.

**Brand Differentiation:** Intense competition requires GT's Living Foods to invest heavily in marketing.

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