

Gut-Brain Axis Nutrition Market Forecasts to 2032 – Global Analysis By Product (Functional Foods, Nutraceuticals, Beverages, and Supplements), Type (Probiotics, Prebiotics, Synbiotics, Postbiotics, and Psychobiotics), Form, Application, End User and By Geography

<https://marketpublishers.com/r/G870E8231A2BEN.html>

Date: September 2025

Pages: 200

Price: US\$ 4,150.00 (Single User License)

ID: G870E8231A2BEN

Abstracts

According to Statistics MRC, the Global Gut-Brain Axis Nutrition Market is accounted for \$1.4 billion in 2025 and is expected to reach \$3.5 billion by 2032 growing at a CAGR of 13.5% during the forecast period. Gut-brain axis nutrition refers to foods and supplements, such as prebiotics, probiotics, or fiber-rich items like fruits, vegetables, and fermented products, that support the connection between gut health and brain function. These nutrient-dense options, free from artificial additives, promote a healthy microbiome, mental clarity, and emotional well-being. Designed for health-conscious consumers, they offer natural solutions to enhance digestion and cognitive health through balanced, gut-friendly diets.

According to Frontiers in Nutrition, this market focuses on probiotics and prebiotics designed to improve mental well-being by modulating the gut microbiome.

Market Dynamics:

Driver:

Rising awareness of mental health

The market is driven by a significant increase in public awareness of mental health and

a growing understanding of the gut-brain connection. Consumers are becoming proactive about managing stress, anxiety, and cognitive function through diet, moving beyond traditional approaches. Scientific validation showing how the microbiome influences mood and brain health via the vagus nerve and neurotransmitter production encourages people to seek nutritional solutions, making gut-brain axis products a targeted strategy for holistic mental wellness.

Restraint:

Complexity of the gut microbiome

A major restraint is the extreme complexity and individuality of the human gut microbiome. A one-size-fits-all nutritional approach often yields inconsistent results because each person's microbial composition is unique, influenced by diet, genetics, and environment. This complexity makes it difficult for companies to make universal efficacy claims, potentially leading to consumer skepticism when products don't deliver expected benefits, thereby hindering widespread trust and adoption without a more personalized approach.

Opportunity:

Personalized nutrition and diet plans

A significant opportunity lies in the development of personalized nutrition plans based on individual microbiome analysis. Advances in gut microbiome testing (e.g., stool sample kits) allow companies to offer tailored recommendations for specific probiotics, prebiotics, and foods designed to correct a person's unique microbial imbalances linked to their mental well-being. This data-driven, customized approach adds tremendous value, justifies premium pricing, and increases efficacy, moving beyond generic solutions to targeted interventions.

Threat:

Misleading marketing and false claims

The market faces a severe threat from misleading marketing and exaggerated health claims that are not fully backed by robust clinical evidence. Some brands may overpromise results for complex mental health conditions, risking consumer disappointment and regulatory backlash. This 'gut-washing' can erode trust in the entire

category, invite stricter regulations from bodies like the FDA and EFSA, and ultimately slow down market growth by confusing consumers and discrediting legitimate science.

Covid-19 Impact:

The COVID-19 pandemic had a profoundly positive impact, sharply accelerating consumer focus on holistic health, immunity, and managing pandemic-related stress and anxiety. This period highlighted the importance of mental well-being, driving interest in preventative and natural approaches. Increased time at home led to more dietary experimentation and online research into the gut-brain connection, introducing these concepts to a mass audience and cementing them as a lasting trend in the nutrition landscape.

The functional foods segment is expected to be the largest during the forecast period

The functional foods segment is expected to account for the largest market share during the forecast period, owing to their convenience, familiarity, and ease of integration into daily diets. Consumers prefer obtaining benefits from everyday foods like fermented items (yogurt, kefir), fiber-rich snacks, and fortified products rather than pills. This format lowers the barrier to entry, supports long-term adherence, and leverages established eating habits, making functional foods the most accessible and commercially scalable way to deliver gut-brain axis nutrients to a broad consumer base, thus securing the largest share.

The probiotics segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the probiotics segment is predicted to witness the highest growth rate, reinforced by intense scientific research and consumer education directly linking specific probiotic strains to mental health benefits (psychobiotics). Strains like *Lactobacillus helveticus* and *Bifidobacterium longum* are clinically shown to reduce stress and improve mood. As evidence grows, consumers actively seek out these targeted strains in supplements and fortified foods, driving innovation and premiumization. This targeted efficacy positions probiotics as the most dynamic and high-growth component within the market.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market

share, ascribed to a deep cultural history of connecting diet with holistic well-being, as seen in Traditional Chinese Medicine and Ayurveda. There is inherent consumer acceptance of functional foods for mental and physical health. A massive population, rising disposable income, and high consumption of fermented foods like kimchi, miso, and kombucha create a mature and receptive market, making APAC the largest revenue generator for gut-brain axis nutrition products.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR associated with a highly health-conscious consumer base, strong demand for personalized nutrition, and a rapid adoption of wellness trends. High digital engagement facilitates effective education on the gut-brain connection. The region is a hub for innovation, with numerous startups and established brands launching targeted psychobiotic supplements and functional foods, supported by significant venture capital funding and a willingness to pay a premium for scientifically-backed mental wellness solutions, driving the fastest growth.

Key players in the market

Some of the key players in Gut-Brain Axis Nutrition Market include Nestlé Health Science, Danone S.A., Abbott Laboratories, Procter & Gamble Co., Yakult Honsha Co., Ltd., Chr. Hansen Holding A/S, BASF SE, DuPont de Nemours, Inc., General Mills, Inc., Kerry Group plc, Unilever PLC, PepsiCo, Inc., Coca-Cola Company, Mars, Incorporated, Johnson & Johnson, and AbbVie Inc.

Key Developments:

In July 2025, Nestlé Health Science launched a new precision probiotic supplement, 'BrainBiome X', specifically formulated with a clinically studied strain of *Bifidobacterium longum* shown in company trials to support stress management and positive mood by modulating the gut-brain axis.

In May 2025, Danone S.A. introduced its first functional yogurt drink under the Activia brand, 'Activia Mind & Gut', which contains a unique probiotic blend, prebiotic fibers, and vitamins B6 and B12 to nourish the gut-brain connection and support emotional well-being.

In April 2025, Abbott Laboratories received regulatory approval for its new medical

nutrition shake, 'Ensure NeuroBiome', designed for older adults. It combines a specific prebiotic fiber with DHA and other nutrients to target cognitive health and gut function through the microbiome.

Products Covered:

Functional Foods

Nutraceuticals

Beverages

Supplements

Types Covered:

Probiotics

Prebiotics

Synbiotics

Postbiotics

Psychobiotics

Forms Covered:

Capsules

Powders

Gummies

Functional Drinks

Applications Covered:

Stress Management

Cognitive Performance

Digestive Health

Mood Regulation

Sleep Support

End Users Covered:

Pharmacies

Health Food Stores

Online Platforms

Supermarkets

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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