

Probiotic & Prebiotic Market Forecasts to 2032 - Global Analysis By Product (Probiotics and Prebiotics), Source, Form, Distribution Channel, Application, End User and By Geography

<https://marketpublishers.com/r/PA008388044CEN.html>

Date: January 2026

Pages: 200

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

ID: PA008388044CEN

Abstracts

According to Statistics MRC, the Global Probiotic & Prebiotic Market is accounted for \$65.34 billion in 2025 and is expected to reach \$104.92 billion by 2032 growing at a CAGR of 7.0% during the forecast period. Probiotics and prebiotics are complementary components that support a healthy gut microbiome and overall well-being. Probiotics are live beneficial microorganisms, commonly found in fermented foods and dietary supplements, that help balance intestinal bacteria, improve digestion, enhance immunity, and support metabolic health. Prebiotics, on the other hand, are non-digestible fibers and compounds that serve as nourishment for these beneficial microbes, stimulating their growth and activity in the gut. When combined, probiotics and prebiotics work synergistically to improve nutrient absorption, strengthen immune function, regulate gut health, and contribute to long-term digestive balance and wellness.

Market Dynamics:

Driver:

Growing Awareness of Gut Health

The probiotic and prebiotic market is strongly driven by growing awareness of gut health and its connection to overall wellness. Consumers increasingly recognize the role of digestive balance in immunity, metabolism, and mental health. This awareness, supported by clinical research and healthcare recommendations, has fueled demand for

functional foods, supplements, and fortified products. As lifestyles become more health-conscious and preventive care gains importance, probiotics and prebiotics are no longer niche products but staples in daily nutrition routines across global markets.

Restraint:

High Production & Storage Costs

High production and storage costs remain a significant restraint for the market. Probiotics require controlled manufacturing environments, advanced fermentation processes, and strict temperature regulation to maintain microbial viability. Additionally, cold-chain logistics and specialized packaging increase operational expenses. These factors raise product prices, limiting accessibility in cost-sensitive regions. For manufacturers, maintaining quality while managing costs poses ongoing challenges, which can restrict market penetration.

Opportunity:

Innovation & Product Diversification

Innovation and product diversification present substantial opportunities for the probiotic and prebiotic market. Manufacturers are developing novel strains, synbiotic formulations, and delivery formats such as gummies, beverages, and fortified foods. Advances in personalized nutrition, microbiome research, and plant-based alternatives further expand market potential. These innovations allow companies to target diverse consumer groups, including children, seniors, and athletes. As science and consumer preferences evolve, differentiated products are becoming key growth drivers in competitive global markets.

Threat:

Regulatory Challenges

Regulatory challenges pose a notable threat to the market. Varying regulations across regions regarding health claims, labeling, and strain approval create complexities for global manufacturers. Strict compliance requirements can delay product launches and increase development costs. Additionally, inconsistent scientific validation standards may limit marketing flexibility. As authorities tighten oversight to ensure consumer safety, companies must navigate evolving regulatory landscapes carefully to sustain

credibility and long-term growth in this rapidly expanding market.

Covid-19 Impact:

The COVID-19 pandemic positively influenced the market by accelerating consumer focus on immunity and preventive healthcare. Demand surged for products supporting digestive health and immune resilience, particularly supplements and functional foods. However, supply chain disruptions and raw material shortages temporarily affected production and distribution. Despite these challenges, the pandemic reinforced long-term health awareness, leading to sustained post-COVID demand and strengthening the role of probiotics and prebiotics in daily wellness routines worldwide.

The gummies segment is expected to be the largest during the forecast period

The gummies segment is expected to account for the largest market share during the forecast period, due to their convenience, palatable taste, and ease of consumption. Gummies appeal strongly to children, adults, and elderly consumers who prefer alternatives to capsules or powders. Their attractive flavors and formats improve compliance and daily intake consistency. Additionally, manufacturers are incorporating advanced formulations without compromising efficacy, making probiotic and prebiotic gummies a dominant and consumer-friendly product category in the global market.

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

Over the forecast period, the pharmaceuticals segment is predicted to witness the highest growth rate, due to rising clinical validation and medical adoption of probiotics and prebiotics. Increasing use in therapeutic applications such as gastrointestinal disorders, immune modulation, and antibiotic-associated conditions supports growth. Healthcare professionals are prescribing pharmaceutical-grade formulations due to standardized dosages and proven efficacy. As research expands and regulatory approvals increase, pharmaceutical applications are expected to grow rapidly, strengthening this segment's contribution to overall market.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, due to high population density, growing middle-class income, and strong cultural acceptance of fermented foods support widespread adoption. Rising health awareness,

expanding nutraceutical industries, and increasing urbanization further drives demand. Additionally, countries such as China, Japan, and India are witnessing rapid growth in functional food consumption, positioning Asia Pacific as a dominant regional market for probiotics and prebiotics.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, owing to advanced healthcare infrastructure and high consumer awareness of gut health. Strong demand for dietary supplements, functional beverages, and pharmaceutical-grade products fuels rapid growth. Continuous innovation, extensive clinical research, and widespread availability across retail and online channels further support expansion. The region's focus on preventive healthcare and personalized nutrition makes North America a key growth engine for the probiotic and prebiotic market.

Key players in the market

Some of the key players in Probiotic & Prebiotic Market include Nestlé, Danone, Yakult Honsha, Ingredion Incorporated, Chr. Hansen, Roquette Frères, DuPont de Nemours, Lallemand, Kerry Group, BioGaia, Archer Daniels Midland Company (ADM), Probi AB, Cargill, Lifeway Foods, and BENEIO GmbH.

Key Developments:

In October 2025, Nestlé Saudi Arabia and King Abdullah University of Science and Technology (KAUST) signed a strategic MoU this partnership blends KAUST's world-class research excellence with Nestlé's global food technology know-how to promote sustainability, food safety, and healthier lifestyles, supporting Saudi Vision 2030 goals while enhancing public health, food security, and local knowledge development.

In July 2025, Nestlé and IBM Research have woven old-world stewardship with cutting-edge AI, creating a generative tool that can dream up new high-barrier packaging materials shielding products from moisture, oxygen and heat while pushing sustainability forward faster than years of lab work.

Products Covered:

Probiotics

Prebiotics

Sources Covered:

Plant-Based

Animal-Based

Microbial

Forms Covered:

Capsules & Tablets

Powders

Liquids

Gummies

Sachets

Distribution Channels Covered:

Supermarkets & Hypermarkets

Pharmacies & Drug Stores

Specialty Stores

Online Retail

Direct Sales

Applications Covered:

Functional Food & Beverages

Dietary Supplements

Animal Feed

Infant Formula

Pharmaceuticals

End Users Covered:

Adults

Geriatric Population

Infants & Children

Livestock Producers

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

Contents

1 EXECUTIVE SUMMARY

2 PREFACE

- 2.1 Abstract
- 2.2 Stake Holders
- 2.3 Research Scope
- 2.4 Research Methodology
 - 2.4.1 Data Mining
 - 2.4.2 Data Analysis
 - 2.4.3 Data Validation
 - 2.4.4 Research Approach
- 2.5 Research Sources
 - 2.5.1 Primary Research Sources
 - 2.5.2 Secondary Research Sources
 - 2.5.3 Assumptions

3 MARKET TREND ANALYSIS

- 3.1 Introduction
- 3.2 Drivers
- 3.3 Restraints
- 3.4 Opportunities
- 3.5 Threats
- 3.6 Product Analysis
- 3.7 Application Analysis
- 3.8 End User Analysis
- 3.9 Emerging Markets
- 3.10 Impact of Covid-19

4 PORTERS FIVE FORCE ANALYSIS

- 4.1 Bargaining power of suppliers
- 4.2 Bargaining power of buyers
- 4.3 Threat of substitutes
- 4.4 Threat of new entrants
- 4.5 Competitive rivalry

5 GLOBAL PROBIOTIC & PREBIOTIC MARKET, BY PRODUCT

- 5.1 Introduction
- 5.2 Probiotics
 - 5.2.1 Lactobacillus
 - 5.2.2 Bifidobacterium
 - 5.2.3 Streptococcus
 - 5.2.4 Bacillus
 - 5.2.5 Yeast
- 5.3 Prebiotics
 - 5.3.1 Inulin
 - 5.3.2 Fructooligosaccharides (FOS)
 - 5.3.3 Galactooligosaccharides (GOS)
 - 5.3.4 Mannan-oligosaccharides (MOS)

6 GLOBAL PROBIOTIC & PREBIOTIC MARKET, BY SOURCE

- 6.1 Introduction
- 6.2 Plant-Based
- 6.3 Animal-Based
- 6.4 Microbial

7 GLOBAL PROBIOTIC & PREBIOTIC MARKET, BY FORM

- 7.1 Introduction
- 7.2 Capsules & Tablets
- 7.3 Powders
- 7.4 Liquids
- 7.5 Gummies
- 7.6 Sachets

8 GLOBAL PROBIOTIC & PREBIOTIC MARKET, BY DISTRIBUTION CHANNEL

- 8.1 Introduction
- 8.2 Supermarkets & Hypermarkets
- 8.3 Pharmacies & Drug Stores
- 8.4 Specialty Stores
- 8.5 Online Retail

8.6 Direct Sales

9 GLOBAL PROBIOTIC & PREBIOTIC MARKET, BY APPLICATION

9.1 Introduction

9.2 Functional Food & Beverages

9.2.1 Dairy Products

9.2.2 Bakery & Confectionery

9.2.3 Non-Dairy Beverages

9.3 Dietary Supplements

9.4 Animal Feed

9.4.1 Poultry

9.4.2 Swine

9.4.3 Ruminants

9.4.4 Aquaculture

9.5 Infant Formula

9.6 Pharmaceuticals

10 GLOBAL PROBIOTIC & PREBIOTIC MARKET, BY END USER

10.1 Introduction

10.2 Adults

10.3 Geriatric Population

10.4 Infants & Children

10.5 Livestock Producers

11 GLOBAL PROBIOTIC & PREBIOTIC MARKET, BY GEOGRAPHY

11.1 Introduction

11.2 North America

11.2.1 US

11.2.2 Canada

11.2.3 Mexico

11.3 Europe

11.3.1 Germany

11.3.2 UK

11.3.3 Italy

11.3.4 France

11.3.5 Spain

- 11.3.6 Rest of Europe
- 11.4 Asia Pacific
 - 11.4.1 Japan
 - 11.4.2 China
 - 11.4.3 India
 - 11.4.4 Australia
 - 11.4.5 New Zealand
 - 11.4.6 South Korea
 - 11.4.7 Rest of Asia Pacific
- 11.5 South America
 - 11.5.1 Argentina
 - 11.5.2 Brazil
 - 11.5.3 Chile
 - 11.5.4 Rest of South America
- 11.6 Middle East & Africa
 - 11.6.1 Saudi Arabia
 - 11.6.2 UAE
 - 11.6.3 Qatar
 - 11.6.4 South Africa
 - 11.6.5 Rest of Middle East & Africa

12 KEY DEVELOPMENTS

- 12.1 Agreements, Partnerships, Collaborations and Joint Ventures
- 12.2 Acquisitions & Mergers
- 12.3 New Product Launch
- 12.4 Expansions
- 12.5 Other Key Strategies

13 COMPANY PROFILING

- 13.1 Nestl?
- 13.2 Danone
- 13.3 Yakult Honsha
- 13.4 Ingredion Incorporated
- 13.5 Chr. Hansen
- 13.6 Roquette Fr?res
- 13.7 DuPont de Nemours
- 13.8 Lallemand

- 13.9 Kerry Group
- 13.10 BioGaia
- 13.11 Archer Daniels Midland Company (ADM)
- 13.12 Probi AB
- 13.13 Cargill
- 13.14 Lifeway Foods
- 13.15 BENEIO GmbH

List Of Tables

LIST OF TABLES

- Table 1 Global Probiotic & Prebiotic Market Outlook, By Region (2024-2032) (\$MN)
- Table 2 Global Probiotic & Prebiotic Market Outlook, By Product (2024-2032) (\$MN)
- Table 3 Global Probiotic & Prebiotic Market Outlook, By Probiotics (2024-2032) (\$MN)
- Table 4 Global Probiotic & Prebiotic Market Outlook, By Lactobacillus (2024-2032) (\$MN)
- Table 5 Global Probiotic & Prebiotic Market Outlook, By Bifidobacterium (2024-2032) (\$MN)
- Table 6 Global Probiotic & Prebiotic Market Outlook, By Streptococcus (2024-2032) (\$MN)
- Table 7 Global Probiotic & Prebiotic Market Outlook, By Bacillus (2024-2032) (\$MN)
- Table 8 Global Probiotic & Prebiotic Market Outlook, By Yeast (2024-2032) (\$MN)
- Table 9 Global Probiotic & Prebiotic Market Outlook, By Prebiotics (2024-2032) (\$MN)
- Table 10 Global Probiotic & Prebiotic Market Outlook, By Inulin (2024-2032) (\$MN)
- Table 11 Global Probiotic & Prebiotic Market Outlook, By Fructooligosaccharides (FOS) (2024-2032) (\$MN)
- Table 12 Global Probiotic & Prebiotic Market Outlook, By Galactooligosaccharides (GOS) (2024-2032) (\$MN)
- Table 13 Global Probiotic & Prebiotic Market Outlook, By Mannan-oligosaccharides (MOS) (2024-2032) (\$MN)
- Table 14 Global Probiotic & Prebiotic Market Outlook, By Source (2024-2032) (\$MN)
- Table 15 Global Probiotic & Prebiotic Market Outlook, By Plant-Based (2024-2032) (\$MN)
- Table 16 Global Probiotic & Prebiotic Market Outlook, By Animal-Based (2024-2032) (\$MN)
- Table 17 Global Probiotic & Prebiotic Market Outlook, By Microbial (2024-2032) (\$MN)
- Table 18 Global Probiotic & Prebiotic Market Outlook, By Form (2024-2032) (\$MN)
- Table 19 Global Probiotic & Prebiotic Market Outlook, By Capsules & Tablets (2024-2032) (\$MN)
- Table 20 Global Probiotic & Prebiotic Market Outlook, By Powders (2024-2032) (\$MN)
- Table 21 Global Probiotic & Prebiotic Market Outlook, By Liquids (2024-2032) (\$MN)
- Table 22 Global Probiotic & Prebiotic Market Outlook, By Gummies (2024-2032) (\$MN)
- Table 23 Global Probiotic & Prebiotic Market Outlook, By Sachets (2024-2032) (\$MN)
- Table 24 Global Probiotic & Prebiotic Market Outlook, By Distribution Channel (2024-2032) (\$MN)
- Table 25 Global Probiotic & Prebiotic Market Outlook, By Supermarkets &

Hypermarkets (2024-2032) (\$MN)

Table 26 Global Probiotic & Prebiotic Market Outlook, By Pharmacies & Drug Stores (2024-2032) (\$MN)

Table 27 Global Probiotic & Prebiotic Market Outlook, By Specialty Stores (2024-2032) (\$MN)

Table 28 Global Probiotic & Prebiotic Market Outlook, By Online Retail (2024-2032) (\$MN)

Table 29 Global Probiotic & Prebiotic Market Outlook, By Direct Sales (2024-2032) (\$MN)

Table 30 Global Probiotic & Prebiotic Market Outlook, By Application (2024-2032) (\$MN)

Table 31 Global Probiotic & Prebiotic Market Outlook, By Functional Food & Beverages (2024-2032) (\$MN)

Table 32 Global Probiotic & Prebiotic Market Outlook, By Dairy Products (2024-2032) (\$MN)

Table 33 Global Probiotic & Prebiotic Market Outlook, By Bakery & Confectionery (2024-2032) (\$MN)

Table 34 Global Probiotic & Prebiotic Market Outlook, By Non-Dairy Beverages (2024-2032) (\$MN)

Table 35 Global Probiotic & Prebiotic Market Outlook, By Dietary Supplements (2024-2032) (\$MN)

Table 36 Global Probiotic & Prebiotic Market Outlook, By Animal Feed (2024-2032) (\$MN)

Table 37 Global Probiotic & Prebiotic Market Outlook, By Poultry (2024-2032) (\$MN)

Table 38 Global Probiotic & Prebiotic Market Outlook, By Swine (2024-2032) (\$MN)

Table 39 Global Probiotic & Prebiotic Market Outlook, By Ruminants (2024-2032) (\$MN)

Table 40 Global Probiotic & Prebiotic Market Outlook, By Aquaculture (2024-2032) (\$MN)

Table 41 Global Probiotic & Prebiotic Market Outlook, By Infant Formula (2024-2032) (\$MN)

Table 42 Global Probiotic & Prebiotic Market Outlook, By Pharmaceuticals (2024-2032) (\$MN)

Table 43 Global Probiotic & Prebiotic Market Outlook, By End User (2024-2032) (\$MN)

Table 44 Global Probiotic & Prebiotic Market Outlook, By Adults (2024-2032) (\$MN)

Table 45 Global Probiotic & Prebiotic Market Outlook, By Geriatric Population (2024-2032) (\$MN)

Table 46 Global Probiotic & Prebiotic Market Outlook, By Infants & Children (2024-2032) (\$MN)

Table 47 Global Probiotic & Prebiotic Market Outlook, By Livestock Producers

(2024-2032) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

I would like to order

Product name: Probiotic & Prebiotic Market Forecasts to 2032 - Global Analysis By Product (Probiotics and Prebiotics), Source, Form, Distribution Channel, Application, End User and By Geography

Product link: <https://marketpublishers.com/r/PA008388044CEN.html>

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

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/PA008388044CEN.html>