

SupplySide[®]
WEST



🕒 October 25-28, 2021 Expo Hall 27 & 28

📍 Mandalay Bay, Las Vegas

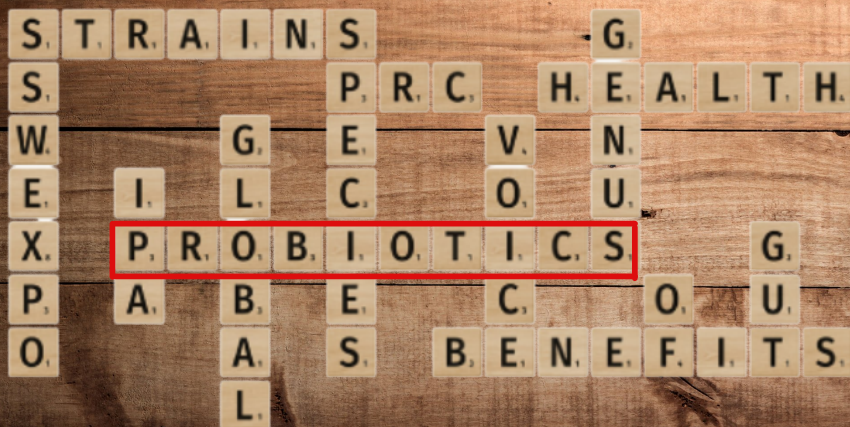
INTERNATIONAL PROBIOTICS ASSOCIATION

PROBIOTICS GUIDE

SUPPLYSIDE WEST 2021

The definitive Probiotics Guide to SupplySide[®] West, including exhibitors, presentation schedules, and more! For the full experience, visit Probiotic Resource Center:

BOOTH 5653



The Global Voice of Probiotics[®]

The Global Voice Which Never Rests: IPA Probiotics Guide

International Probiotics Association: Staying the course!

IPA's mission is to promote safe and efficacious use of probiotics worldwide. It is nice to see we are putting virtual "on hold" and are slowly transitioning back to physical shows and conferences.

For close to 18 months, we have been challenged; both physically and mentally. The "microphobia" mindset brought on by the pandemic created an array of difficult circumstances to navigate. From one perspective we needed to protect ourselves from exposure to the virus which created this fear of all microbes, and on the flip side to that depriving our bodies from organisms which are beneficial for overall health. Not exposing ourselves to microbes – good and bad – weakens our body's natural defenses, as it forgets how to deal with them. More than 70% of the body's immune system is in the intestines, so digestive health is paramount. Based on hundreds of studies in humans, probiotics can be a great tool to support immunity, from helping individual cells to modulating the entire system.

In a study which IPA funded (looking at only 2 specific databases out of the many which exist), we found over 1,600 clinical studies registered. These clinical trial registries revealed over 700 different areas of study and indications for probiotics. A quick overview of this body of clinical science outlines two probiotic areas that emerged from the study: the gastrointestinal tract and immunity. We note that studies were also performed in areas such as the gut-brain axis, women's health, children's health, oral health, allergy applications and beyond. The IPA's extension to "Part two" of this study will be an analysis of some of these outcomes.

With so much research and science tied to probiotics and immune support, and an increasing public looking towards prevention, the market for probiotic supplements increased globally. IPA together with the data partners conducted market research updates earlier this year. From a global scale the probiotic supplement industry grew a little over 8%. IPA numbers showed that the U.S. (which incidentally is the largest dietary supplement market for probiotics) reported growth of almost 10%; which was a big difference from previous forecasts. China surpassed Italy as the second largest market. APAC region continues to show growth and is now more than 50% of the entire probiotic global category. This is but a small snippet of what our members received as information from the market data research we commissioned. Other areas of data market interest were e-commerce and online channels. Conservative numbers have shown continued global growth at almost 14%, and the largest VSM category on Amazon were probiotics.

"HAVE A VOICE." Join the global community of probiotic companies. Your company can shape the IPA's mission of promoting the safe and efficacious use of probiotics throughout the world. Visit www.internationalprobiotics.org to learn how IPA is making a difference in the probiotic world; join the unified "Global Voice of Probiotics®".



George Paraskevacos, MBA
IPA Executive Director
george@internationalprobiotics.org



Probiotics Resource Center

Booth 5653 @ **SupplySide[®]**
WEST

Rising consumer health concerns contribute significantly to the growth of the probiotics market; meanwhile increasing amounts of disposable income and standards of living will benefit the overall market. There are real business opportunities for probiotic manufacturers looking to provide products to promote overall health and wellness.

Discover the latest breakthroughs in probiotic technology, new product development, consumer analysis, and the market trends through the exhibitors, the presentations in the theater, and featured infographics in the Probiotics Resource Center (PRC) at SupplySide® West 2021!

Sponsored by:  + 

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Probiotics Resource Center

Featured Exhibitors Booths A – D



HEALTH WRIGHT PRODUCTS

Booth 5653-A

US-based Health Wright Products (HWP) is the largest and one of the most respected manufacturers of encapsulated probiotic dietary supplements and nutritional products in the industry. HWP provides quality, service and value through its expertise and focus, specializing in probiotics and digestive enzyme products. HWP produces thousands of unique and complex formulas for some of the industry's most trusted and innovative brands. HWP infuses quality into every capsule from analyzing raw materials to final product inspection and storage. Learn more at HealthWrightProducts.com and TheProject150Promise.com.

EUROFINS

Booth 5653-B

Eurofins "Probiotics Center of Excellence" offers a complete range of contract laboratory testing services from probiotic enumeration to identification and contamination. We actively partner with probiotic raw material suppliers to offer material specific enumeration methods that allow Eurofins customers to test with confidence. Eurofins knows how to help, whether you're an ingredient supplier or sell finished products direct to consumers. We know your bottom line depends on our top-of-the-line lab testing services. Obtaining verifiable data from a trusted lab is the only way to ensure your products are authentic and safe.

MIDI LABS

Booth 5653-C

MIDI Labs is an ISO 17025 accredited, FDA-registered, and cGMP - compliant, microbial identification laboratory. We provide rapid, accurate and cost-effective bacteria, yeast, and fungal identification services. MIDI Labs specializes in probiotic identification and enumeration (total plate count) services. We are the first commercial DNA sequencing laboratory and have been in business for over 25 years. MIDI Labs is located in Newark, Delaware.

SOLNUL

Booth 5653-D

Inspiring resistant starch innovation. Backed by a body of clinical and scientific research, Solnul™ is raising the bar for prebiotic and resistant starch categories. It demonstrates: improvements in GI health and microbial balance; prebiotic benefits like increases in Bifidobacterium; IBS related symptoms and regularity; and healthy aging - all at low doses. It has several substantiated structure/function claims brands can utilize to capture the growing demand for prebiotic products. By partnering with Solnul™, you'll gain access to our human microbiome research, patent portfolio, industry insights and exclusive claims for dietary supplement and pre/pro combinations, and functional food and beverage applications.



Probiotics Resource Center

Featured Exhibitors Booths E – J

MERICAL

Booth 5653-E



MeriCal finds solutions across many different delivery systems! MeriCal is a leading manufacturer of finished-format probiotics in North America. As The Probiotic Experts®, they have over 40 years of formulation and stability experience with both lactic acid and spore forming bacteria. In 2017, they opened doors to a state-of-the-art, dedicated Probiotic Suite where they manufacture and package probiotics in exceptional temperature and humidity controlled conditions. Now in 2021, MeriCal is excited to add gummy manufacturing to their portfolio. MeriCal offers anything from basic A-Z formulations to complex, custom formulations of any dry-dosage and gummy format.

AMIN TALATI WASSERMAN

Booth 5653-F



US-based Health Wright Products (HWP) is the largest and one of the most respected manufacturers of encapsulated probiotic dietary supplements and nutritional products in the industry. HWP provides quality, service and value through its expertise and focus, specializing in probiotics and digestive enzyme products. HWP produces thousands of unique and complex formulas for some of the industry's most trusted and innovative brands. HWP infuses quality into every capsule from analyzing raw materials to final product inspection and storage. Learn more at HealthWrightProducts.com and TheProject150Promise.com.

NUTRASOURCE

Booth 5653-I



Nutrasource is a premier regulatory consulting, clinical research, and product testing firm that brings unparalleled expertise in nutrition, regulatory affairs and pharmaceutical science to help clients achieve compliance and gain market entry for health products globally. With nearly 20 years' experience, Nutrasource provides vertically-integrated solutions in the pharmaceutical and nutraceutical industries to develop robust regulatory strategies and quality clinical programs which provide a unique advantage in product commercialization. With a strong regulatory filing success rate, Nutrasource has a unique combination of experienced personnel providing the leadership needed to launch products with strong science and regulatory confidence – from concept to claim. www.nutrasource.ca



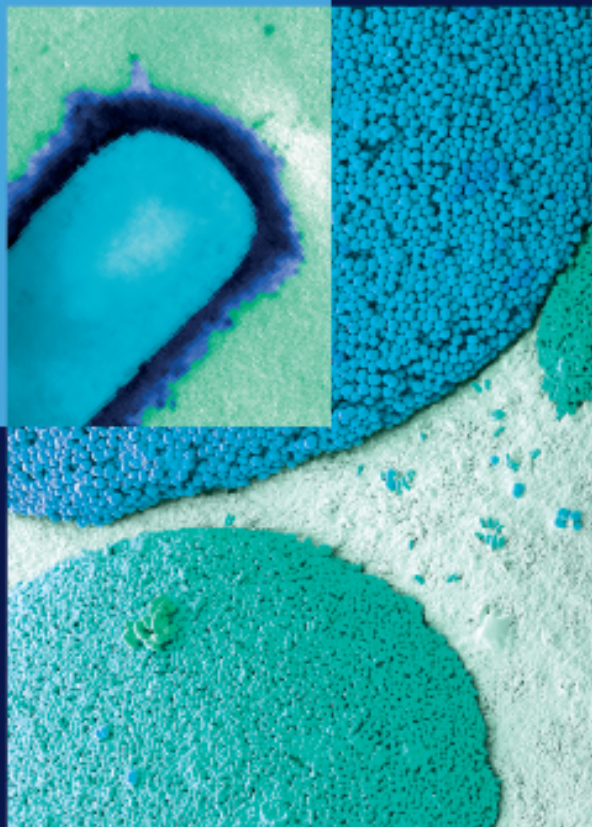
IPA

Booth 5653-J

The International Probiotics Association (IPA) is a global non-profit organization bringing together through its membership, the probiotic sector's stakeholders including but not limited to academia, scientists, health care professionals, consumers, industry and regulators. The IPA's mission is to promote the safe and efficacious use of probiotics throughout the world. Holding NGO status before the Codex Alimentarius, the IPA is also recognized as the unified **Global Voice of Probiotics®** around the world. www.internationalprobiotics.org

Surfing together the Probiotic Galaxy

*Come visit
us at booth
3845*



Probiotics Producer
High science strains
From strain isolation
to finished product
Tailor made formulations
Ready to market products



IN DIFFERENT THERAPEUTIC AREAS

probiotical.com

Probiotics Resource Center

Theater Schedule

DAY 1

Wednesday October 27, 2021

10:00

EXPO HALL OPENS

10:30 - 11:10



HOW STABLE ARE YOUR PROBIOTICS? STABILITY MATTERS IN A WIDE NET OF APPLICATIONS

T. Jonathan Tanaka, M.S.

Scientific & Regulatory Affairs, Snr. Project Manager, Morinaga Nutritional Foods, Inc.

- Stability matters on the strain level for commercial applications.
- A wide net of commercial applications is available for probiotics, but keeping a viable count is important.
- It is important to consider manufacturing processes and stability substantiation for commercial products containing probiotics.

11:20 - 12:00



A PRESENTATION FROM CSL

Silvia Balzaretti, R&D Health and Nutrition Scientist

12:10 - 12:50



CHALLENGES AND OPPORTUNITIES IN PROBIOTIC MANUFACTURING

Sarah Jameson

Chief Quality Officer/Chief Operations Officer, Health Wright Products

13:00 - 13:40



GOING BEYOND GASTROINTESTINAL HEALTH: AN EXPLORATION OF NOVEL PROBIOTIC SOLUTIONS

Aicacia Young, RDN

Director of Scientific Affairs, Novozymes OneHealth

- Define psychobiotic, postbiotic, and probiotic
- Identify 3 extra-gastrointestinal benefits of probiotic therapy
- Discuss the impact of environmental toxins and pathogens on the microbiome
- Describe the role of stress in gastrointestinal and systemic dysfunction

Probiotics Resource Center

Theater Schedule

DAY 1

Wednesday October 27, 2021

13:50 - 14:30

CHR. HANSEN

Improving food & health

HUMAN CLINICAL TRIALS AND THE ROLE THEY PLAY IN PROVIDING SCIENTIFIC SUPPORT

Gregory Leyer, PhD

Sr. Director - Scientific Affairs, Chr Hansen

- Learn about Chr. Hansen's upstream science capabilities including unique research tools and unmatched in-house expertise
- Discover the importance of human clinical trials from design through execution
- Hear first-hand the results from our most recent human clinical trials completed across all life stages

14:40 - 15:20



Deerland
Probiotics & Enzymes

GROWING IS KNOWING: NEW RESEARCH REVEALS CLEAR EVIDENCE OF GERMINATION OF THE PROBIOTIC BACILLUS SUBTILIS DE111®

Dr. John Deaton

VP of Science & Technology, Deerland Probiotics & Enzymes

- The study design and outcomes showing clear evidence that *Bacillus subtilis* DE111 spores germinate in the human small intestine, and begin growing and thriving within hours of consumption.
- The implications of germination and its location and timing as it relates to probiotic activity.
- The body of additional clinical support for the strain's observed health effects, including microbiome and immune support in adults and children, regularity, and cardiovascular health.

15:30 - 16:10



SlimBiotics

PROBIOTICS IN THE METABOLIC SYNDROME - EFFECTS AND MECHANISMS

Prof. Jürgen Schrezenmeir

Medical Advisor, Slimbiotics GmbH

- In meta-analyses of controlled clinical trials probiotics exerted beneficial effects on body weight, BMI, waist circumference, body fat mass, visceral adipose tissue, insulin sensitivity, glucose and lipid metabolism and liver steatosis.
- Beside dietary factors, which are known, to play a key role in the pathogenesis of the metabolic syndrome, an aberrant microbiota interacting with diet and disturbing gut barrier function is involved resulting in translocation of LPS, inflammation in key tissues of metabolism, insulin resistance and lastly diabetes and atherosclerosis.
- Probiotics with anti-inflammatory properties, which enhance the gut barrier function and are able to metabolise fructose through the mannitol pathway (without producing ethanol), seem to be particularly suited for the management of the metabolic syndrome.

17:30 EXPO HALL CLOSES

Probiotics Resource Center

Theater Schedule

DAY 2

Thursday October 28, 2021

10:00 EXPO HALL OPENS

10:30 – 11:10



THE EFFICACY OF PROBIOTICS AND SYSTEMIC ENZYMES IN THE RESOLUTION OF POST-COVID FATIGUE

Neha Shah, Ph.D., Director, Pulmonary Fibrosis NOW!

- Supplemental therapy with probiotics (ProbioSEB CSC3) and systemic enzymes (ImmunoSEB) accelerates clinical improvement in mild to moderate COVID-19 patients.
- A 14-day supplementation of probiotics (ProbioSEB CSC3) and systemic enzymes (ImmunoSEB) resolves post-COVID-19 fatigue and can improve patients' functional status and quality of life
- Supplementation with probiotics can be a potential tool to aid in the recovery of COVID-19 patients, many of whom continue to experience severe fatigue, both physical and psychological, several months after initial infection.

11:20 – 12:00



THE EVOLVING CONSUMER RELATIONSHIP WITH PROBIOTICS, & WHAT IT MEANS FOR THE NEXT ERA OF PROBIOTIC INNOVATION

Kevin Cencula

Marketing Manager – Probiotics, Kerry

- 1.It's not only supplements and yogurt, anymore. Consumers are becoming increasingly receptive to probiotics across a wide array of food & beverage categories.
- 2.Credibility is paramount. To just say that a product "contains probiotics" is not enough. Consumers are becoming increasingly savvy, and they want transparency and scientific evidence that the product they are consuming contains viable organisms, at high-enough cell counts, to deliver the health benefits being claimed.
- 3.Taste matters. The perceived health benefits of a probiotic-fortified product are made even stronger when paired with the right complementary flavor or ingredient, which can make all the difference between a "winning" product and one that falls flat.

12:10 – 12:30



PROBIOTIC MARKET DATA PRESENTATION BY NMI

Diane K. Ray, BSE, MBA

VP Strategic Innovation NMI Solutions

12:35– 12:55



AMAZON PROBIOTIC MARKET DATA PRESENTATION

Jake Bernstein

Director of Sales, ClearCut Analytics

Probiotics Resource Center

Theater Schedule

DAY 2

Thursday October 28, 2021

13:00 - 13:40 **IMMUNITY IS SO MUCH MORE THAN NOT BEING SICK: STUDYING IMMUNE FUNCTION IN HEALTHY PEOPLE**

nutrasource

Dr. Susan Hewlings, PhD, RD

Director of Scientific Affairs, Nutrasource

- Testing Immune Support is more than just did the subjects get sick or not, defining "supports a healthy immune system" is critical to supporting your claims
- Immunity and Nutrition are multi-dimensional and therefore study design should be too
- Assessing nutritional status by intake is not always a reflection of physiological nutritional status, knowing the appropriate biomarkers is critical

13:50 - 14:10



A FILM FROM YOUR IPA TEAM

George Paraskevacos, MBA, Executive Director

Jessica Terhaar, PhD, Scientific Affairs Director

Vi-Van Phan, BBA, Member & Event Services Manager

Sandra Saville, RD, Education & Communication Director

14:15 - 14:35

WHAT'S NEXT FOR PROBIOTICS IN 2022 & BEYOND?

Michael Hughes

Head of Research and Insight, FMCG Gurus



- How are the motivations for turning to probiotics evolving and how important are multi-functional benefits
- Which claims on products appeal to consumers the most and how can probiotics be most effectively positioned
- What's steps can the industry take to raise awareness and influence of the science behind probiotics on purchasing habits.

14:40 - 15:20



**Synbiotic
HEALTH**
the synbiotic experts™

PINPOINTED PROBIOTICS + PURPOSEFULLY PAIRED PREBIOTICS = POTENT PRODUCTS

Dr. Zac Lewis, PhD.

Chief Science Officer, Synbiotic Health

- How thinking about the gut as an ecosystem yields insights that can improve probiotic efficacy.
- How to rationally pair pre- and probiotics in a synbiotic product formula.
- Synbiotic Health has a portfolio of Ecologically Advanced™ strains, and/or can partner with you to develop new ones.

15:30 - 16:10

IPA COMEDY SHOW

Ivan Wasserman, Esq.

The One & Only Probiotic Comic



17:00

EXPO HALL CLOSES - SEE YOU NEXT YEAR!

Your Probiotic Market Access Partner

From Concept to Claim

- ✓ Clinical Trials
- ✓ Regulatory
- ✓ Certifications

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Pharmaceutical and Nutraceutical Services



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KSM-66
Ashwagandha®

WORLD'S BEST ASHWAGANDHA



Food ingredients
North America

Show Dates October 25-28, 2021 | Expo Hall October 27 & 28, 2021
Mandalay Bay, Las Vegas, NV

Join us at SupplySide West & Food ingredients North America 2021!

IPA Probiotics Resource Center

Wednesday, October 27 | 10am-5:30pm

Thursday, October 28 | 10am-5pm

Booth #5653

The IPA Probiotics Resource Center, organized in association with the International Probiotics Association (IPA), showcases the latest information about the probiotics market, all in one convenient location. Connect with IPA member companies and join your colleagues for presentations covering the latest in probiotic technology, important regulatory updates, consumer analysis and market trends.

Produced with the support of:



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Pharmaceutical and Nutraceutical Services

Microbiome modulation for strategic wellness

Tuesday, October 26 | 9-11:30am

South Pacific Ballroom G

The human microbiome not only hosts trillions of microbes and hundreds of bacterial species, it's also unique to each individual—and its composition can fluctuate regularly with everything from diet to stress. The bulk of bacterial microorganisms reside in the gut, making it a hot spot to further impact immune and brain health, weight, mental wellness and more. As science continues to unveil a range of ingredients with potential to impact the microbiome, industry is charged with developing innovative products and further educating consumers about the space.

This session will cover:

- Emerging microbiome science and whole-body health (digestion, immunity, heart, brain, skin, etc.).
- Researched “-biotic” ingredients and formulation synergies that may help modulate gut microbiota.
- Related market data, challenges and opportunities, including consumer perceptions and behaviors.
- Recent trends in microbiome-related product launches and areas with promising white space.

Underwritten by:





Stellar Biotics, the maker of del-IMMUNE V[®], is at the forefront of immune support science.

Developed through Cell Fragment Technology[™], del-IMMUNE V[®] harnesses the power of metabiotics, the latest science supporting the microbiome, and is the leading non-prescription cell fragment supplement backed by clinical research on the U.S. market.

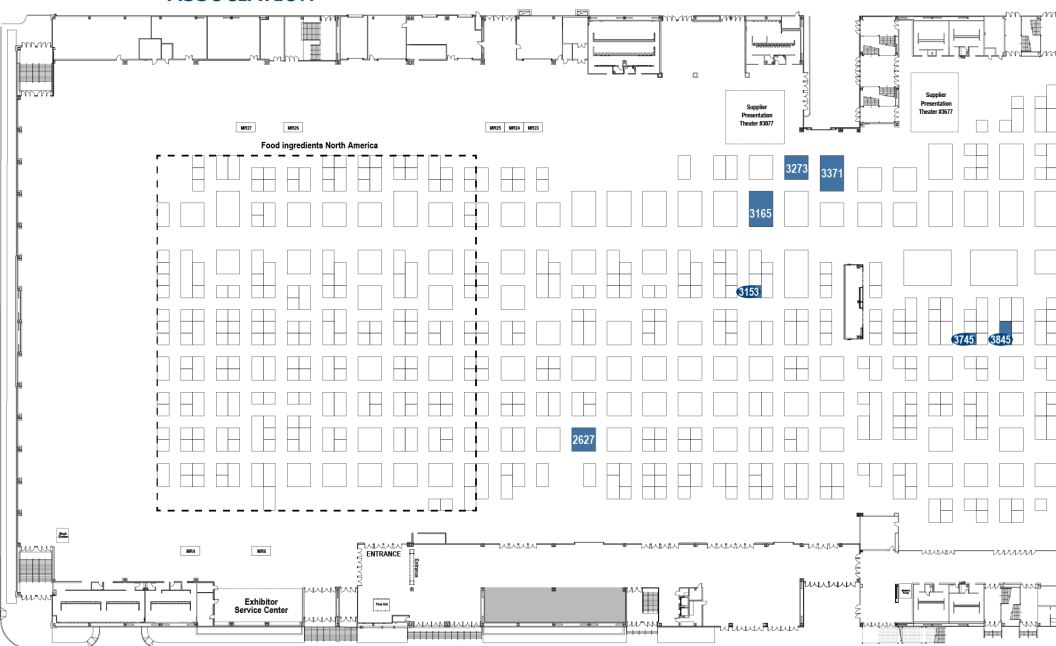
Learn more at
delimmune.com/ipa

As of September 1st, 2021 - IPA's Community is
100 member companies strong



ASK US ABOUT JOINING TODAY!

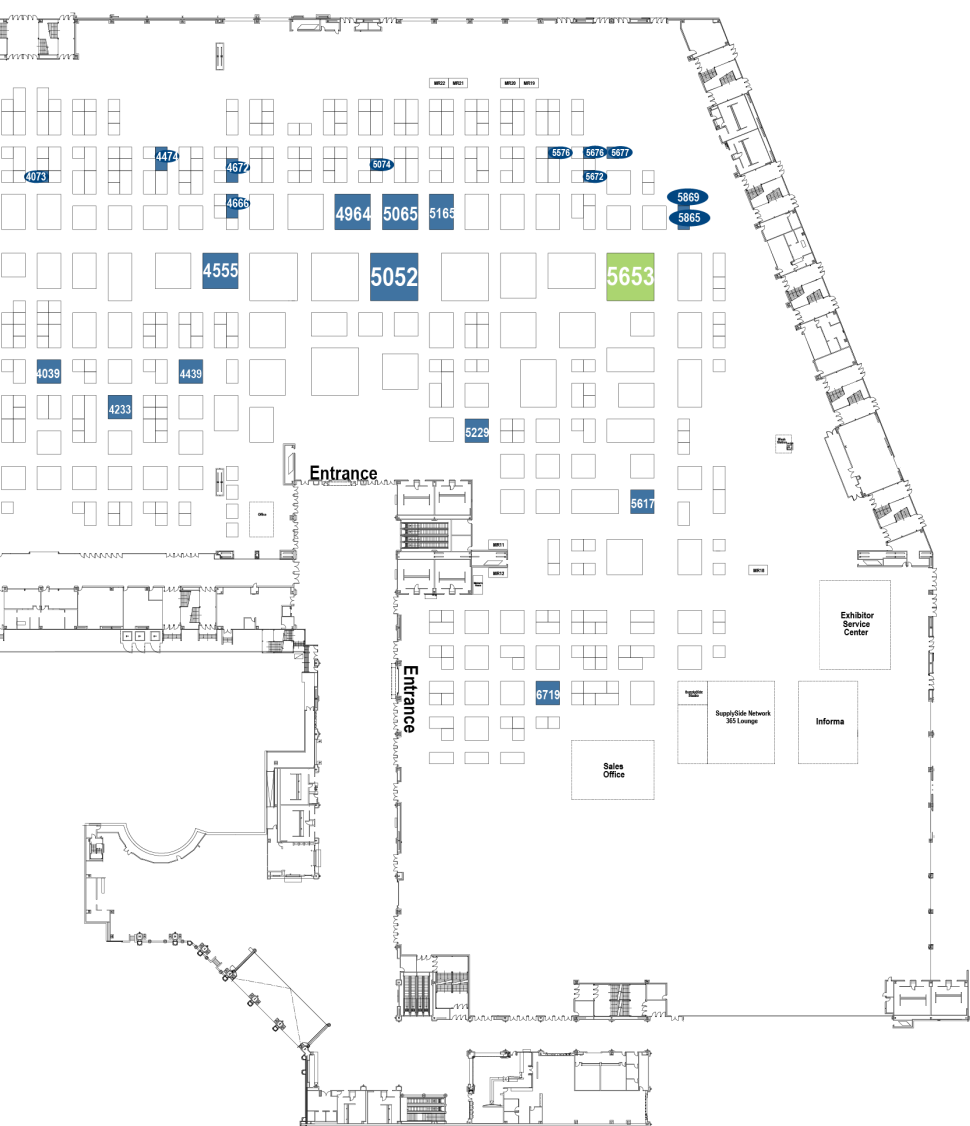




Probiotics Resource Center

SupplySide® West 2021

<u>Health Wright Products</u>	<u>5653 -A</u>	<u>Merical</u>	<u>5653 -E</u>
<u>Eurofins Microbiology Laboratories Inc.</u>	<u>5653 -B</u>	<u>Amin Talati Wasserman</u>	<u>5653 -F</u>
<u>Midi Labs, Inc</u>	<u>5653 -C</u>	<u>Nutrasource</u>	<u>5653 -I</u>
<u>Solnul</u>	<u>5653 -D</u>	<u>IPA</u>	<u>5653 -J</u>



Probiotics Resource Center

IPA Member Probiotic Trail

AB-Biotics SA / Kaneka	3371	Novozymes A/S	6719
AIDP, Inc.	5052	NSF International	4672
Amin Talati Wasserman	5653-F	Nutralliance, Inc.	4039
Aptar CSP Technologies	5576	NutraSource	5653-I
Atlantia Clinical Trials Ltd	2627	Prenexus Health, Inc.	5074
BIO-CAT Microbials	3273	Probi	4439
Catherych Inc. - Proenzymes Inc.	3745	Probiotal Healthcare S.R.L	3845
Centro Sperimentale del Latte S.R.L.	5672	ProDigest BVBA	3165
Chr Hansen AS	5865	Qingdao Vland Biotech Inc.	3153
Deerland Probiotics & Enzymes	5229	ROELMI HPC SRL	4073
Eurofins Microbiology Laboratories Inc.	5653-B	Sabinsa Corporation	4555
glac Biotech Co., Ltd (Bioflag Group)	5676	Sanzyme Biologics (Pvt) Ltd	5869
Health Wright Products	5653-A	Scientific Living	4666
IFF	5065	Sirio Pharma Co., Ltd	5165
Lallemand Health Solutions Inc.	4233	Solnul	5653-D
Gnosis by Lesaffre International	4964	Specialty Enzymes & Probiotics	5617
Merical	5653-E	Synbiotic Health, LLC	5677
Midi Labs, Inc	5653-C	US Pharma Lab, Inc.	4474

Probiotics E-Commerce Sales & Consumer's Perceptions

an IPA Commissioned Report Exclusive to Membership

DIGESTION VS IMMUNITY PROBIOTIC SUPPLEMENTS

Americas



Europe



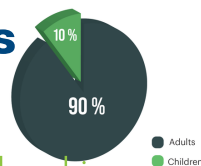
Asia



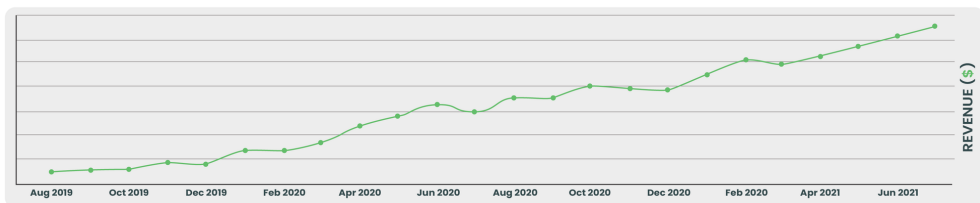
Probiotics E-Commerce Sales & Consumer's Perceptions

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10% OF PROBIOTICS SOLD ON AMAZON ARE TARGETED FOR CHILDREN




PROBIOTICS GREW BY 50% YOY ON AMAZON



PROBIOTICS ARE LEADING SUPPLEMENT SALES ON AMAZON

Subcategory	Revenue Rank	YoY Growth
 Probiotics	1	50% ▲
Multivitamins	2	54% ▲
Collagen	3	63% ▲
Omegas	4	45% ▲
Vitamin D	5	87% ▲

CAPSULES ARE THE TOP DELIVERY FORM ON AMAZON, BUT GUMMIES ARE GAINING POPULARITY

Delivery Form	Market Share	YoY Growth
 Capsules	74%	49% ▲
Gummies	7%	66% ▲
Powder	6%	25% ▲
Chewables	4%	36% ▲
Liquid	4%	67% ▲

BRAND HIGHLIGHTS FROM AMAZON



240+ brands each generated **\$100,000+** in revenue from selling probiotics within the last 12 months.

The **top 10** probiotics brands hold **52%** of the subcategory's market share.

ON AMAZON, CONSUMERS ARE BUYING 30-COUNT PRODUCTS THE MOST

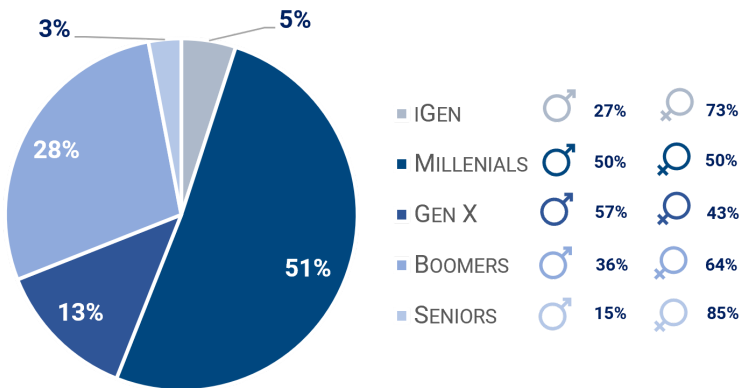
Size/Count	Market Share	YoY Growth
30	40%	82% ▲
60	27%	31% ▲
90	5%	27% ▲
100	3%	30% ▲
120	3%	17% ▲

THIS DATA IS PROVIDED BY CLEARCUT ANALYTICS.

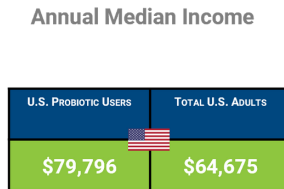
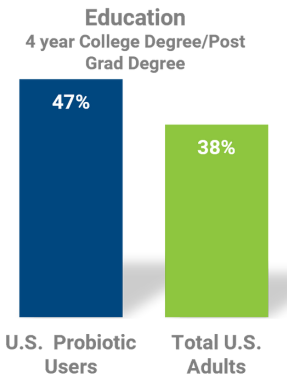
Understanding the Probiotic Adult User: Top of Mind - Maintenance & Wellness

an IPA Commissioned Report Exclusive to Membership

MORE THAN 53 MILLION PROBIOTIC USERS (18+) ACROSS THE U.S.
*254 MILLION U.S.



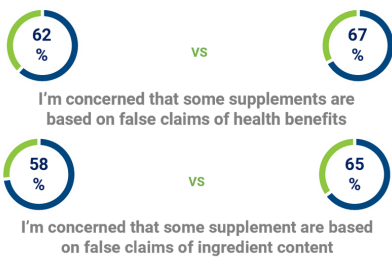
PROBIOTIC USERS ARE MORE LIKELY TO BE COLLEGE GRADS & HAVE A HIGHER INCOME



Understanding the Probiotic Adult User: Top of Mind - Maintenance & Wellness

an IPA Commissioned Report Exclusive to Membership

PROBIOTIC USERS WORRY MORE ABOUT FALSE CLAIMS & INGREDIENT CONTENT: A CERTIFICATION MAY ADD VALUE



PROBIOTIC USERS ARE LOYAL CONSUMERS WHO ARE MORE CONCERNED WITH QUALITY OVER PRICE



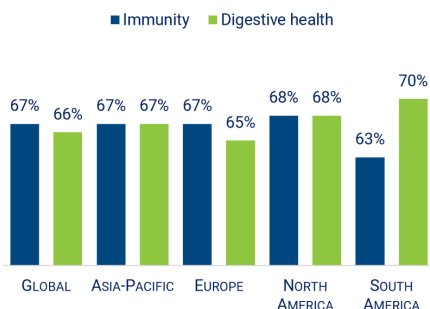
PROBIOTIC USERS ARE TWICE AS LIKELY TO SHOP FOR VITAMINS & SUPPLEMENTS AT HEALTH FOOD STORES*

	U.S PROBIOTIC USER		U.S ADULT SUPPLEMENT USER
MASS MERCHANDISER (I.E., WALMART, K-MART, TARGET)	59%	vs.	46%
DRUG STORE/PHARMACY	45%	vs.	36%
INTERNET (I.E., AMAZON, IHERB, BODYBUILDING.COM)	43%	vs.	24%
TRADITIONAL GROCERY STORE/ SUPERMARKET	30%	vs.	27%
WAREHOUSE/CLUB STORE I.E., SAM'S, COSTCO	32%	vs.	22%

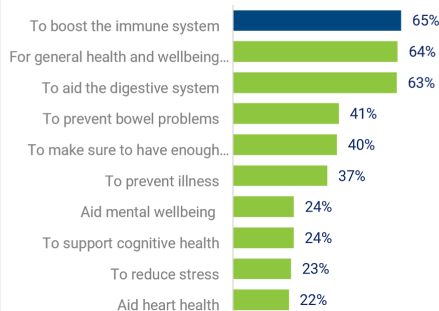
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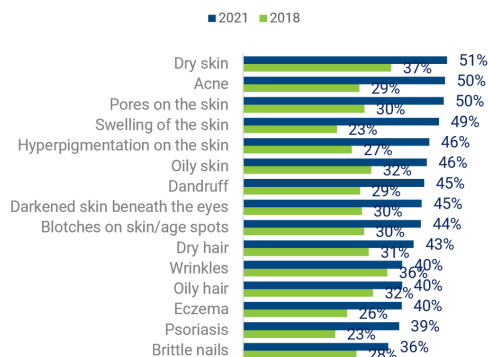
EVEN WHEN NOT SUFFERING FROM SPECIFIC SYMPTOMS CONSUMERS ARE INTERESTED IN IMMUNITY AND DIGESTIVE HEALTH PRODUCTS



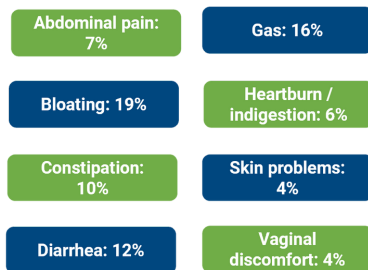
TOP 10 REASONS WHY CONSUMERS PURCHASED PROBIOTICS - 2020



SKIN HEALTH IS ALSO A MAJOR OPPORTUNITY FOR PROBIOTICS: SKIN HEALTH HAS BEEN SEVERELY IMPACTED BY COVID-19



WHAT SYMPTOMS WERE YOU EXPERIENCING WHEN YOU FIRST CONSUMED PROBIOTICS? CONSUMERS WHO PURCHASE/USE PROBIOTICS



I WAS NOT EXPERIENCING ANY SYMPTOMS: 47%

Euromonitor

an IPA Commissioned Report Exclusive to Membership



TOP 3 PROBIOTIC
SUPPLEMENT MARKETS
REPRESENTED **54%** OF
GLOBAL CONSUMPTION

\$6.789B USD
GLOBAL PROBIOTIC
SUPPLEMENTS MARKET
(LARGEST CATEGORY IN 2020)

GLOBALLY PROBIOTIC
SUPPLEMENTS MARKET
GREW BY **8%** IN 2020

27.1%
PROBIOTIC YOGHURT
FORECASTED GROWTH
FOR 2020-2025

20%
FORECASTED PROBIOTIC
SUPPLEMENT GROWTH
2021-2026

\$32.6B USD
FORTIFIED PROBIOTIC
YOGHURT GLOBAL
MARKET

GLOBAL SOUR MILK
RETAIL MARKET IN 2021
WAS **\$7.4B** USD &
FORECASTED TO GROW
16.2% BY 2026

TOP 3 MARKETS
(PER CAPITA SPEND FOR PROBIOTIC
SUPPLEMENTS IN USD)

ITALY: \$11.21
USA: \$6.91
FINLAND: \$4.65

DATA PROVIDED BY EUROMONITOR INTERNATIONAL

IPA Current Companies



IPA Current Companies



MOFIN ALCE GROUP



The Education & Communication Committee (ECC) is identifying the knowledge gaps in the industry and busting the myths and the misconceptions, and creating tools to educate probiotic basics and sharing interesting facts.

A short, snappy podcast series is under development to showcase and explain timely issues, everything you ever wanted to know about probiotics, and cool information. Stay Tuned!

Let us know how we can help to meet your education needs regarding probiotics.

Keep an eye out for our newest resources from the ECC throughout the months ahead!



Sandra Saville, RD
Education & Communication Director
sandra@internationalprobiotics.org

One of the biggest misconception people around the world have about probiotics is that they are not regulated, which is **FALSE!**

To find out more, become an IPA Member to gain access to the IPA Regulatory Manuscript - ***The Must have Regulatory Tool.***

George Paraskevacos, MBA
IPA Executive Director
george@internationalprobiotics.org

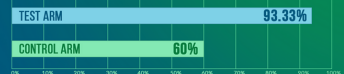


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With 5 market data partners at our member's disposal, you can have valuable information about the probiotic market globally.

If you are not an IPA member, you are definitely missing out...

Contact me, I'll sign you up!



Vi-Van Phan, BBA
IPA Member & Event Services Manager
vi@internationalprobiotics.org

Why are we doing what we are doing at the Scientific Committee (SC) you ask?

We are doing what we do to protect the scientific integrity of probiotics, to stimulate and curate high quality probiotic science for the industry, to support the safe, efficacious use of high quality probiotic.

You are an IPA member and you want to join the Scientific Committee? Reach out to me.



Jessica Terhaar, PhD
Scientific Affairs Director
jessica@internationalprobiotics.org

Contributing Members

IPA Probiotic Guide



GEORGE PARASKEVAKOS, MBA

Executive Director, IPA

George has been involved with the probiotic industry since 2007 where he served in various roles from business development to account management with a globally recognized probiotic producer. During this time, he also served on the IPA Board of Directors (BoD) and had two (2) mandates as President before taking on the association's leadership role as Executive Director in 2015. His passion for the probiotic industry is unequivocal and his persistence to have IPA continue being The Global Voice of Probiotics® has taken the association from 40 members when he took on the role to now over 100 international companies under his tutelage. George represents the International Probiotics Association in the media, to all probiotic industry stakeholders including government agencies and Codex, and in appearances at conventions, conferences, and other symposiums.



JESSICA TER HAAR, PHD

Scientific Affairs Director, IPA

Jessica ter Haar (née Younes) joined IPA's team as Scientific Director in September 2018; she was formerly a Microbiome Science Liaison and Business Developer at Winclove B.V. in Amsterdam. Jessica is specialized in women's health and probiotics and holds a doctorate degree from the University of Groningen (the Netherlands) in medical microbiology and a Masters in Nutrition and Nutraceutical Sciences (University of Guelph). Her mandate with the IPA is help craft and define a more concrete scientific identity for global and regional sectors, supporting member companies and other committees as needed and driving a proactive scientific agenda.



SANDRA SAVILLE, RD

Education & Communication Director, IPA

Sandra Saville is a registered dietitian and food and nutrition expert with over 25 years of diverse experience in food, nutrition, health and wellness. She has a university degree in nutrition and food science. Sandra's expertise in health and the microbiome extends through diverse areas of health care and nutrition support. Sandra included probiotics in patient care since the early 1990's. She has led the creation and development of probiotic resources, and delivered numerous probiotic presentations to health care professionals throughout North America. Sandra co-chaired the Education & Communication Committee since 2018 and joined IPA in 2020 as the Education & Communication Director.



VI-VAN PHAN, BBA

Member & Event Services Manager, IPA

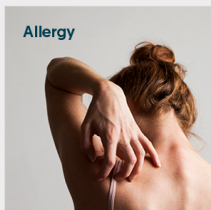
Vi-Van Phan also referred to as Vi, received a Bachelor of Business Administration from University of Quebec in Montreal in 2010. Throughout her career, with her excellence in planning and organizing as well as her care for customer experience, she has developed and implemented various procedures to facilitate the business operations, including accounting and project managements. After serving both in the public and private sector in retail and finance industry for the past 11 years, her interest in Probiotics led her to join the non-profit IPA in 2019 as the Member & Event Services Manager. She is the support to all the members; she takes care of you!

Improving health through evidence-based probiotics

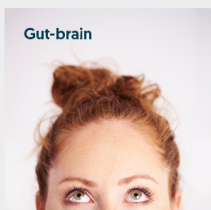
Cardiometabolic



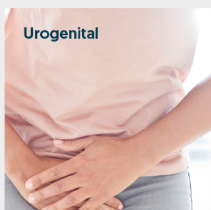
Allergy



Gut-brain



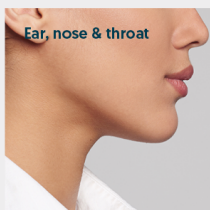
Urogenital



Drug related effects



Ear, nose & throat



Gastrointestinal



Winclove Probiotics, established in Amsterdam, The Netherlands, has been specializing in research, development and manufacturing of probiotic formulations since 1987. Our probiotic formulations are developed in close collaboration with leading research institutes, universities and academic hospitals all over the world. This enables us to develop innovative multispecies probiotic formulations for a variety of health indications.

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wincloveprobiotics.com