Probiotics and Prebiotics: What in the World Is Going On?

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The U.S. market appears to have awaken to the benefits and functionality of prebiotics and probiotics. Not only do we see more products on the market in the United States that contain prebiotic or probiotic ingredients, but we also see a significant increase in the number of products that make that specific claim or statement on the front of the package.

Prebiotics and probiotics are far more established in other countries than in the United States. In fact, probiotics have become quite established, and in some countries, saturated in the marketplace. In virtually every country but the United States, consumers can purchase 100-mL "shot" bottles of fermented probiotic dairy drinks. These drinks are not designed as a refreshment beverage, but rather are considered as a "daily shot of goodness," or a way to give the system a bit of a boost.

Muesli Probiotic Flakes

Company: Carrefour
Category: Breakfast Cereals
Country: Portugal
Price in local currency: 2.65€
Product description: Carrefour Muesli Probiotic Flakes contains *lactobacillus acidophilus* and yogurt pearls. The product is strawberry and vanilla flavoured.

Cereal Bars

Company: Schwartauer Werke
Category: Snacks
Country: Germany
Price in local currency: 1.95€
Product description: Corny Activ Dreierlei Nuss is a pack of six cereal bars with three kinds of nuts. It contains prebiotic dietary fibres and one bar is said to contain 15% of the daily recommended intake of fibre. Also available are Yogurt with Soya and Dark Chocolate varieties.

Prebiotics, on the other hand, appear to be a bit more evenly spread across countries. Certainly, there are more prebiotic introductions in the United States, as a total share of all prebiotic introductions, than we see doing the same analysis with probiotic introductions.

It should be noted that there is a significant difference in terms of the number of introductions of both prebiotics and probiotics depending on whether you look for the use of certain ingredients or you look for the specific claim statements on the package. As a general rule, only about 15% of all products that contain any prebiotic or probiotic ingredients make a specific claim statement on the front of the package as to the content or benefits.

Nevertheless, there are a number of interesting examples in the market that promote their prebiotic and probiotic content and benefits. Two of the most significant products have appeared on the U.S. market.

Dannon has made a new attempt to attract consumers to the benefits of probiotics with its Activia yogurt (introduced first in Europe, but now sold in the United States). The company says that consumption of one yogurt cup per day for 2 weeks will result in a significantly improved digestive tract. This is strong language for the United States and a claim that has not been associated with probiotics or yogurt in the United States in the past. It will be interesting to see if the company expands Activia to new product categories, especially into 100-mL shot bottles.

In nondairy categories, Kellogg has brought its considerable ability to develop cutting edge products (seen mostly outside the United States) with its Kashi Vive cereal. The cereal is claimed to be the first nonperishable probiotic food on the U.S. market. While that is strictly true for the United States, it is not the first shelf-stable probiotic product on the market globally. Carrefour, for example, introduced in Portugal a muesli cereal, and perhaps more significantly, a company called Ecobrands in the United Kingdom introduced a probiotic breath mint in the United Kingdom. The introduction of this product brings the idea of probiotics to a wider audience (an audience that may not consume yogurt) and extends the ingredient into completely new categories. This, in turn, should spur additional consumer interest in consuming probiotics and understanding what they are and their benefits. (As an interesting side note, the company repurposed the Vive brand name, which previously appeared on a Canadian breakfast cereal from the company, which contained soy protein and was geared to women.)

In the world of prebiotics, products are more evenly spread across a number of product categories (whereas with probiotics they tend to be centered on the dairy category). Because one of the major prebi-

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Wholewheat Breakfast Cereal

Company: Weetabix
Category: Breakfast Cereals
Country: France
Price in local currency: 2.57€
Product description: Weetabix Weetaflakes Cereal is said to be rich in fibre and low in fat and the first breakfast cereal with prebiotic fibre. It is said to combine the good taste of whole wheat and the lightness of rice to give a crispy and generous flake. It is available in a 375g pack.

Wholegrain Porridge with Prebiotic

Company: Tesco
Category: Breakfast Cereals
Country: UK
Price in local currency: £1.28
Product description: New to the Tesco Kids range is Wholegrain Porridge comprising wholegrain oat flakes with prebiotic inulin. This product is free from artificial colours, flavours, sweeteners and preservatives and has strict limits on fat, sugar and salt. It can be microwaved in five minutes, is suitable for vegetarians and is available in a 240g pack of twelve 20g sachets.

otic ingredients is often flaxseed, we see a number of baked goods (bakery products, cereals, snacks) making probiotic claims. In the U.S. market, products making a strong prebiotic claim appear to be mainly limited to the natural foods sector, with introductions from companies such as Horizon Organic Dairy and some smaller companies as well.

The U.S. market has much to learn from other countries in terms of prebiotic product introductions. The U.K. market has been particularly active, especially with products that are geared specifically to children. Again, Kellogg was one of the first companies to introduce a prebiotic cereal in the United Kingdom, under the Rice Krispies Muddles brand. Also in the United Kingdom, retailer Tesco introduced a prebiotic whole-grain porridge (hot cereal), positioned specifically to improve childrens' digestive health. In addition to providing the benefits of the prebiotics, it also makes claims as to having strict limits on fat, sugar, and salt (note this more balanced approach to formulation, as compared with "fat").

Other prebiotic products of note include Ryvita Goodness snack bars in the United Kingdom, containing both oligofructose and inulin, and positioned as "delightfully chewy;" Corny Activ bars from Schwartauer Werke in Germany, made with oligofructose and bearing the claim that each bar contains 15% of the daily requirement of fiber; and Weetabix Weetaflakes cereal, sold in a number of countries in Europe and with a prominent front-of-pack claim as to the prebiotic ingredients (oligofructose).

What's ahead for probiotics and prebiotics, especially in the U.S. market? It could be that Activia will pave the way for more open discussion as to the functional, digestive benefits of both prebiotics and probiotics. While this may take a while to become well established and accepted by consumers, there still is opportunity in the marketplace. For prebiotics, the focus for U.S. companies could be instead to focus on two other related claims that consumers appear to understand: added fiber and whole grains. The degree to which these three claim statements can be linked may provide the best way to convey multiple benefits to consumers.

Companies seeking to develop products making probiotic and prebiotic claims should look to activity in other countries for some best-in-class examples. The European market excels at probiotics, especially the United Kingdom. Prebiotic innovation also appears predominantly in Europe, with introductions being centered mainly in the United Kingdom, Germany, and France. From our perspective, success in the U.S. market for probiotics and prebiotics is a combination of educating the consumer and watching product developments in Europe.

Goodness Bar

Company: Ryvita Company
Category: Snacks
Country: UK
Price in local currency: £1.39
Product description: Goodness Bar from Ryvita is a range of energy bars made from chewy wholegrain rye. The bars are prebiotic and are available in three flavours: Mixed Berry; Apple and Sultana; and Cranberry and Raisin. The bars are free from added sugar, added salt, colours, flavours and preservatives. They contain 62 calories, 3% fat and 20% fruit, are high in fibre, and are suitable for vegetarians. This product is available in a 138g box of six 23g bars.

Lynn Dornblaser, with almost 20 years experience of tracking and analyzing new product trends, brings to the Global New Products Database and Mintel International Group a unique perspective on the marketplace and future new product development. Based in Chicago as director of the company's Custom Solutions Group, Dornblaser is responsible for answering clients' needs for new product expert knowledge. She also is closely involved in the continued development of the Global New Products Database. She has been quoted in numerous trade publications, including Prepared Foods, and has been quoted in major U.S. news organizations, including The Wall Street Journal, USA Today, The New York Times, and CNN. Dornblaser also has spoken to a number of industry groups and at sales meetings and product ideation meetings for a variety of consumer packaged goods companies. Dornblaser can be contacted at lynnd@mintel.com.