

INSIGHT SURVEY
Business growth delivered

SOUTH AFRICAN PROBIOTICS MARKET INSIGHTS REPORT

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COMPANY OVERVIEW



Insight Survey is a boutique South African market research agency with over 15 years of experience, specialising in Business-to-Business (B2B) and Industry research to ensure smarter, more-profitable business decisions are made with reduced investment risk.

We offer **B2B market research solutions** to help you to successfully improve or expand your business, enter new markets, launch new products or better understand your internal and external environment.

We believe in the advantage market research gives business leaders to fully understand their industry, facilitate business strategy, improve company performance, and drive company growth.

INDUSTRY & COMPETITOR INTELLIGENCE

Our bespoke Industry and Market Intelligence can help give the edge in a global marketplace, empowering your business to overcome industry challenges quickly and effectively, and enabling you to realise your potential and achieve your vision. From strategic overviews of your business's competitive environment through to specific competitor profiles, our customised Intelligence is designed to meet your unique needs.



QUESTIONS WE HELP ANSWER

- What is the current and future market size?
- What are the latest global and local trends impacting on the market?
- Who are your key competitors and what is their offering in terms of products, services, pricing and branding?



OUR RESEARCH SOLUTIONS



Competitor pricing research



Store visits and store checks



Competitor interviews



Customer interviews



Company website analysis



Governmental held records

OUR HEALTHCARE EXPERIENCE

We are a proudly South African company that have provided market research solutions and Intelligence reports to local and global brands. We have worked with some of the greatest companies and brands in their industries.



REPORT OVERVIEW

The **South African Probiotics Market Insights Report (39 pages)** provides a dynamic synthesis of industry research, examining the local and global **Probiotics industry** from a uniquely holistic perspective, with detailed insights into the entire value chain – market size, industry trends, innovation and technology, and industry drivers and challenges.

SOME KEY QUESTIONS THE REPORT WILL HELP YOU TO ANSWER:

For the Global Probiotics Industry Section:

- What are the current market dynamics of the Global Probiotics industry (including Prebiotics and Digestive Enzymes)?
- Which are the key markets within the Global Probiotics industry?
- What are the latest Global Probiotics industry trends, innovation and technology, drivers, and challenges?

For the South African Probiotics Industry Section:

- What are the current market dynamics (market size, market value, and market volumes): 2019-2024 Actual, 2025-2029 Forecasts, and distribution channels?
- What are the latest South African Probiotics industry trends, innovation and technology, drivers and challenges?
- What are Porter's Five Forces shaping the South African Probiotic market?
- What is the Steep analysis of the South African Probiotic market?

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SAMPLE FROM REPORT

GLOBAL INDUSTRY OVERVIEW: PROBIOTIC DIETARY SUPPLEMENTS

The global Probiotic Dietary Supplements market is expected to reach an estimated value of approximately US\$13.3 billion in 2025* and is predicted to grow at a compound annual growth rate (CAGR) of 9.7% over the 2025* to 2035** forecast period. With this, the global Probiotic Dietary Supplements market is expected to reach US\$34.1 billion in 2035**, as illustrated in the adjacent graph.

- In terms of this growth, increasing consumer awareness of the role of Probiotics in digestive health, immunity, and overall well-being is driving strong demand, particularly among younger demographics and health-conscious individuals.
- Growth within the adult segment is being supported by rising awareness of gut health, immunity, and metabolic wellness. The prevalence of gastrointestinal disorders is also contributing to increased demand for natural gut support solutions. Probiotics are widely used for conditions such as irritable bowel syndrome, inflammatory bowel disease, and antibiotic-associated diarrhoea, with strains such as *L. plantarum* and *S. boulardii* showing proven benefits.
- Additionally, growing product availability and heightened consumer awareness are seen to be accelerating market expansion, despite still moderate per capita spending on Probiotics.
- Moreover, improved distribution channels, strategic partnerships with international brands, and localised formulations tailored to cultural preferences are further enhancing accessibility and appeal.

- However, the market faces notable challenges related to regulation and standardisation of products globally. The effectiveness of Probiotics often varies depending on strain, dose, and formulation, and the absence of consistent global regulations and labelling standards creates confusion among consumers, which can hinder growth.
- Furthermore, intensifying competition within the market is resulting in price pressures, with established brands and new entrants offering similar products and formulations. Consumer scepticism regarding efficacy, fuelled by inconsistent scientific evidence for certain health claims, is also reducing consumer confidence and restraining broader adoption of Probiotic Supplements.
- In terms of market segmentation, the global Probiotic Dietary Supplements market can be segmented by Form into Capsules, Tablets, Powders, Liquids, Gummies, and Others. The Capsules segment is expected to continue holding a dominant share, accounting for approximately 36% of the market in 2025.



* Estimate

**Forecast

SAMPLE FROM REPORT

SA TRENDS, INNOVATION AND TECHNOLOGY, DRIVERS AND CHALLENGES

TRENDS

ONLINE AVAILABILITY OF PROBIOTICS TRENDING

- South African e-commerce is experiencing growth as consumers gain confidence in online shopping, with Probiotic products increasingly available through leading platforms.
- As an example of this trend, Gloom launched its product range, including its Daily Probiotic, on the Checkers Sixty60 app, promoting convenient, same-day delivery.
- Similarly, Velobiotics shared that its products are now available on Takealot, South Africa's largest online marketplace, highlighting this increased availability of Probiotics in the e-commerce space.
- Finally, Amazon South Africa also recently expanded its platform to include health supplements following strong consumer demand, making Probiotic products more widely accessible nationwide.



INNOVATION AND TECHNOLOGY

AMPIRO LAUNCHES NEW PACKAGING



- In March 2025, Ampiro/Metagenics South Africa introduced its groundbreaking Activ-Vial packaging, designed to be ten times more effective than standard Probiotic bottles.
- The company highlighted that this new packaging has been specifically designed to safeguard Probiotics from environmental factors such as moisture, light, and heat.
- Additionally, this advanced protection technology completely removes the requirement for refrigeration, offering a significant advantage for both retailers and consumers by simplifying storage and distribution.

DRIVERS

RESEARCH AND INNOVATION DRIVE LOCAL PRODUCTION AND MARKET

- Research and innovation (R&I) are supporting growth in the South African Probiotics market, through continuous investment in gut microbiome studies.
- In particular, this research and innovation pipeline is being supported through projects such as the AWI-Gen 2 Microbiome Project, Africa's largest population-representative gut microbiome study, which links microbiota diversity to geography, lifestyle, and health.
- Moreover, the Council for Scientific and Industrial Research (CSIR) is developing a scalable local manufacturing process for new paediatric Probiotic gummy supplements, with the objective of reducing reliance on imports, improving affordability.
- As a result, these initiatives are positioning South Africa to produce affordable, population-specific Probiotics, supporting growth in the market through continuous investment in R&I and product development.



CHALLENGES

PROBIOTIC-LINKED BACTERAEMIA THREATENS LOCAL MARKET



- The bacterium *Alkalihalobacillus clausii* (*A. clausii*) is a common ingredient in over-the-counter (OTC) Probiotics and is generally regarded as safe to use in healthy populations. However, recent evidence suggests *A. clausii* can cause serious complications, such as bacteraemia, septic shock, or multi-organ dysfunction, in immunosuppressed, elderly, or comorbid patients.
- South Africa's Probiotics market now faces new scrutiny following the country's first documented bacteraemia outbreak, linked to the use of Enterogermina Probiotics in Gauteng and North West hospitals in November 2024. The NICD reported 11 cases, including three deaths among patients with pre-existing comorbidities.
- These risks carry particular relevance in South Africa, where over eight million people are living with HIV and multimorbidity levels are rising.
- In response, Opella Healthcare South Africa has revised product labels and warnings to clarify that Probiotics are not suitable for immunocompromised patients.

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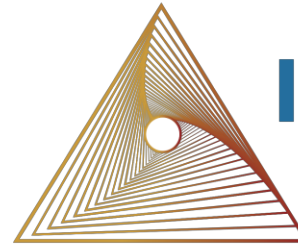
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