



ADM GLOBAL CONSUMER TRENDS SERIES
June 2022 / Microbiome: The Root of Wellness

Top Predictions for the Global Microbiome Market in the Year Ahead



Building on ADM's [Global Consumer Trends](#) series, launched in October 2021, the company is diving deep into each of the mega trend spaces garnering interest among consumers. ADM has uncovered the top trends shaping the global human microbiome market, which is expected to balloon and reach \$9.1 billion by 2026.¹

ADM, the world leader in nutrition that powers many of the top food, beverage, health and wellness brands, collated the findings from its propriety consumer insights platform to identify the new and emerging opportunities shaping the global microbiome segment in the year ahead.

The biggest opportunity? Meeting the needs of consumers as they adopt a more personalized approach to supporting their well-being. Many are becoming increasingly aware of the potential role their gut microbiome plays in their everyday lives, from their physical to their emotional health. In fact, ADM Outside VoiceSM in partnership with the Hartman Group, discovered that more than half (58%) of consumers are aware of the potential benefits that bacteria in the digestive system can have on their overall health.

The outlook below highlights the consumer trends shaping demand for solutions targeting the gut microbiome, from multi-functional ingredients to prebiotics, probiotics, and increasingly, postbiotics.²

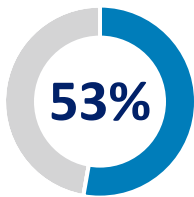
The top five trends shaping the microbiome market in the year ahead:



1

Growing consumer awareness of the gut-brain connection and the link between microbiome function with mood and cognition

In partnership with FMCG Gurus, ADM’s Outside VoiceSM research found that more than half (58%) of global consumers are aware of the potential benefits that bacteria of the digestive tract may have on aspects of health and well-being.³ With growing belief in a connection between mind and body, consumers are paying more attention to the impact their food, beverage and supplement choices may have on their well-being. In fact, 53% of consumers state that products designed to support brain health are appealing.⁴



53% of consumers state that products designed to support brain health are appealing

Emerging research supports this connection: according to a study from the University of Oxford, BioKult’s multispecies probiotic supplement [have shown that the product can support mood](#) along with other related cognitive measures. While still in its infancy, new and exciting developments in the field of “psychobiotics” are beginning to show potential, with new applications emerging that will offer consumers new ways to support function of the gut-brain axis.



2

Personalized nutrition solutions designed to support everyday performance for Olympians and Weekend Warriors alike

Consumers are adopting a more holistic view of their diet and lifestyle choices, with gut health at the center. The microbiome has become the new frontier for the next generation of personalized nutrition, with growing evidence of links to sleep hygiene, overall mental well-being, immune function and more. Protein bars and ready-to-drink shakes are household staples for all active lifestyles—soon they will be tailored to support each individual’s specific activity and lifestyle needs.

Moreover, with recent advancements in genomics and further research into the physical fitness-gut microbiome link, we could soon see consumer products become tailored to each individual athlete’s performance needs.

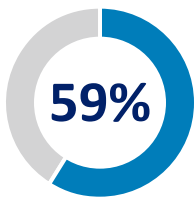
The top five trends shaping the microbiome market in the year ahead:



3

Consumers are using test-kits to benchmark the make-ups of their microbiome as personalized nutrition phenomenon gains hold

Personalized assessment solutions are helping consumers learn more about their bodies, including analyses of their individual gut microbiomes, and these services are fast becoming mainstream. New technology in the field is equipping consumers with testing kits to benchmark the make-up of their microbiomes, and consumers are using this information to try new diet and lifestyle habits. New up-starts are equipping consumers with microbiome testing kits to benchmark their gut health and provide insights into the composition of their microbiome and aspects related to its potential function.



59% of global consumers find the idea of nutrition-focused genetic testing appealing

Consumers are interested in these solutions. Research shows more than half (59%) of global consumers find the idea of nutrition-focused genetic testing appealing, and of those, 64% would be willing to use this technology, according to [data](#) from FMCG Gurus.



4

Demystification of probiotics and the skin microbiome

Many consumers believe the potential benefits of probiotics extend well beyond the gut – with some looking to probiotics to support their skin microbiome. Research is just beginning to catch up with the role the gut microbiome plays in skin health.

While the nuances of the gut-skin link are [still emerging](#), researchers have started to pinpoint key differences in individuals’ microbiota, creating new opportunities in the market for probiotic ingredients that support skin health.

As more insights emerge, consumers are beginning to think beyond simple cosmetic concerns and considering their skin health from a holistic wellness perspective. And in a crowded skincare market, they are looking for solutions that back up their claims. ADM has a rapidly growing number of clinical trials researching the role of the gut microbiome in skin health to inform its development of [probiotic formulations that address skin care](#).

The top five trends shaping the microbiome market in the year ahead:



5 Consumer interest in immune health will be a top priority today and in the future

Support for immune function remains top of mind among health-conscious consumers. New insights into the gut microbiome underlie the potential for proactive solutions on this front – like supplements that increase the diversity of microbiota in our guts.

ADM insights show 75% of global consumers say they will make greater attempts to stay healthier, and 65% are more conscious of their immune health due to COVID-19.⁵ What's more, [66% of global supplement consumers](#) are seeking out supplements formulated to support immune function. While the pandemic has amplified conversations around immune health, the trend is likely to continue as consumers carry new nutritional routines into their new normal.

Together, these emerging developments in the field of microbiome solutions combined with growing mainstream consumer interest have created a market with high growth potential.

Consumer products that support the human microbiome are coming on the heels of emerging research and scientific breakthroughs – creating an environment ripe for innovation, collaboration and potentially life-changing solutions.

ADM's team of researchers, nutrition scientists and regulatory experts, in concert with its innovative partners, puts the leading global food solution provider in a unique position to help shape the future of nutrition with the microbiome at its core.

Sources:

1. Euromonitor – IPA Global Probiotics Market Insights
2. This communication is intended for B2B use and no statements are meant to be perceived as approved by regulatory authorities.
3. ADM Outside VoiceSM in partnership with FMCG Gurus (August 2021)
4. FMCG Gurus, *Assessing the Importance of Cognitive Health* (June 2021)
5. FMCG Gurus, *How Has COVID-19 Changed Consumer Behavior* (March 2021)