



ITC INSIGHTS: DIETITIAN SURVEY 2020

PREBIOTIC CATEGORY

EXECUTIVE SUMMARY



What is the ITC 2020 Dietitian Survey?

Ingredient Transparency Center recently concluded its third annual dietitian survey, involving 200 dietitians across the United States. Our multi-category insights drive understanding of supplement use and recommendation behaviors by this key stakeholder group with an intense focus on emerging and important categories, placed into context by comparing these against more established and broader categories like probiotics, omega-3s and vitamin D.

The emerging categories explored include astaxanthin, coenzyme Q10, collagen, curcumin/turmeric, glucosamine, prebiotics and vitamin K.

We've also looked at year over year data and some findings have been impacted by COVID which are noted.

Who are these dietitians?

In early summer 2020, ITC surveyed over 200 dietitians across the United States. In general terms, the dietitians divided into groups based on a few over-arching criteria and these separations became part of the processing and analysis. The report is organized into general cross-category responses and insights, followed by a deep dive into ITC core categories.

Primary comparisons include:

RECOMMENDATION APPROACH

'Food first' practitioners, those dietitians that strongly favor food solutions, but will, from time to time recommend supplements vs. 'mixed food and supplement' dietitians, who pretty much equally look to both food and supplement in their dialogue with their patients.

WORK ENVIRONMENT

Practice dietitians who see more patients in a one-on-one consultative fashion, vs. institution dietitians. Both groups here do provide supplement recommendations, but the patterns differ significantly in many cases.

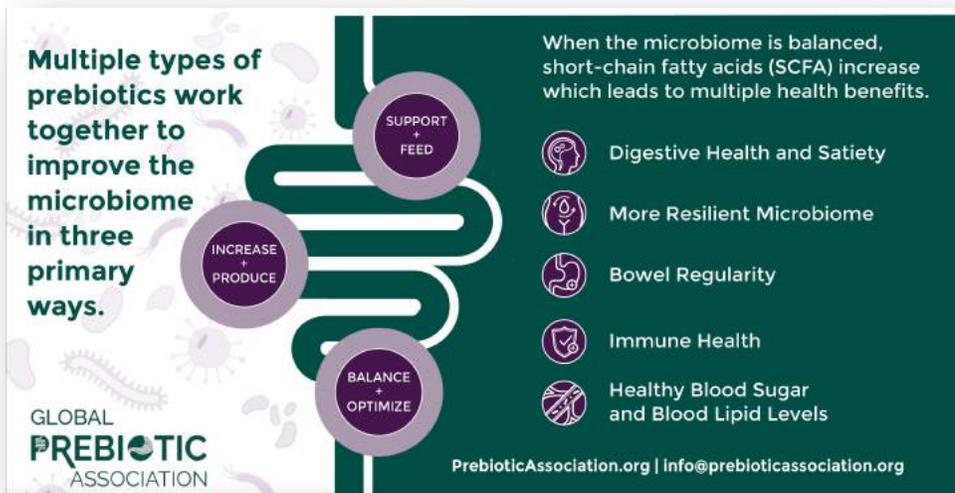
AGE

Additional data and insights are provided throughout the report based on the age of the dietitians. What they take, what they look for and what they recommend – all are influenced in part by the age of these respondents.

Digging into prebiotics:

The Global Prebiotics Association (GPA), the non-profit trade association representing the worldwide prebiotics category, defines a prebiotic as **a nutritional product or ingredient selected to be utilized in the microbiome producing health benefits.**

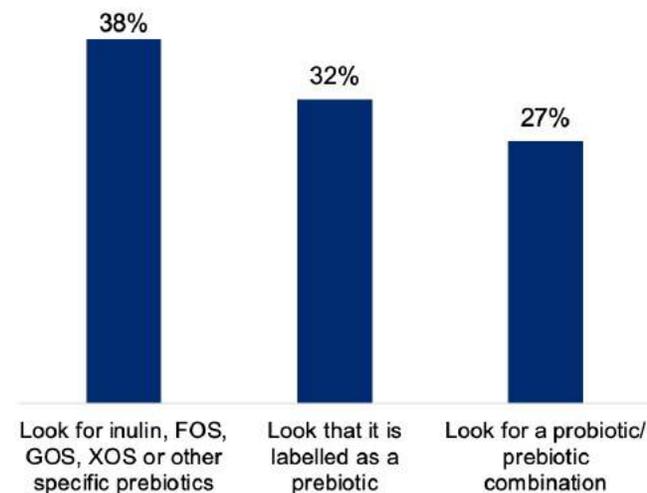
There are several known mechanisms by which prebiotics act to confer health benefits, with new science allowing us to track what is happening even at receptor level within the microbiome. In simple terms, prebiotics act either chemically or physically, often but not always by interacting with gut microbes and generally serve to: support and feed, increase and produce and balance and optimize – all within the microbiome.



The prebiotic category has seen rapid growth over multiple years moving out of the shadow of probiotics for multiple health conditions and benefits: gut health and digestion; increasingly into overall immunity; and even more in areas such as mood and mental wellness as scientific research expands the prospects.

This acceleration and broadening of perceived and possible health benefits is clearly shown in the insights as awareness is growing and dietitians are becoming more knowledgeable and discerning generally.

This matches ITC's analysis of the marketplace, as product developers look to formulate with multiple prebiotic sources and new or emerging prebiotic ingredients like (XOS) xylo-oligosaccharides, pectin oligosaccharides, acacia fiber, arabinoxylan and beta-glucans, while the science base has broadened for well-documented ingredients such as inulin.



In the very early days of the prebiotic category, much of the emphasis was on fiber, with fiber frequently used instead of – or interchangeably with – the term 'prebiotic'. However, it is important to note that not all fibers are prebiotic – and there are many more food constituents shown to exhibit prebiotic activity than simple fiber sources. This fact about prebiotics – the alignment with food sources, makes this category very interesting when considering the approach, opportunity and impact when engaging with dietitians as key influencers.

New developments and research into prebiotic combinations and mechanism of action mean that product developers can more effectively create products in multiple delivery formats – explicitly in food and beverage formats in addition to supplement. These lower dosages can also help to overcome the negative consequences of higher dose ingredients, whether that be gastric distress or taste issues and represent significant opportunities for growth.

To target this dietitian influencer community, an understanding of beliefs and behaviors is critical, including how these dietitians want to be interacted with and where they go for information and education. However, hitting that sweet spot of engagement is doable, and smart marketers are increasingly seeing dietitians as a strategic target. The ITC findings validate this approach. Overall awareness of prebiotics, in addition to what dietitians understand about the category clearly gives insights into the influencer opportunity and can help dictate marketing tactics.

The growing market opportunity

In addition to overall immune and digestive function, emerging microbiome research is revealing roles for prebiotics in satiety, sleep, stress, inflammation and even new gut function mechanisms of action are coming to light.

This new research offers potential for product development across a variety of formats and for numerous conditions. Terms like the ‘gut-brain axis’ and ‘skin microbiome’ are quickly moving into the public realm, and with them nutrients like prebiotics that can make a difference.

To put market size in context, the current global human-use prebiotics market is worth approximately \$3.5bn, according to market estimates, with the US market worth around one third of this. These numbers include fiber-based prebiotics across food, beverages and supplements, of which chicory root-sourced inulin remains the dominant prebiotic.

The above numbers also include established and emerging ingredients such as alpha-amylase resistant starch, psyllium and other fiber/inulin positioned food-type offerings like fructo-oligosaccharides (FOS), galacto-oligosaccharides (GOS), human milk oligosaccharide (HMOs), AXOS, chito-oligosaccharides, neoagaro-oligosaccharides, polyphenols and others, for uses in foods, beverages and supplements.

While conversations around fiber remain important in the wider context, it is important to note that a fiber-based, food-centric, market positioning of prebiotic ingredients is increasingly giving way to the use of more specific and specialist terms, in addition to greater use of the term prebiotic itself, and growing conversations around microbiome modulation.

Future drivers of the category are expected to include broad education, learned from categories such as omega-3’s, probiotics and even to a certain extent, vitamin D. Meanwhile, the continued rise of synbiotics and holistic ‘microbiome solutions’ and ‘personalization’ all support ongoing category potential.

Dietitians have increase awareness and interest in this category and these can be leveraged into strong, resilient relationships going forward.



Questions?

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