

GLOBAL
PREBIOTIC
ASSOCIATION

BOARD MEETING

SupplySide West 2024



Champion the prebiotics category by increasing public awareness and understanding of the science supporting both well-known and newfound benefits and create needed transparency about prebiotics and their interaction with the microbiome.



MISSION



AGENDA

- Welcome and Updates: Executive Director Len Monheit
- Association 2024 Priority Initiatives
- Other Committee Updates
 - Science + Technical
 - Regulatory
 - Communications
- 2024 Strategic Priorities and 2025 planning
- Upcoming Shows, webinars and conferences
- Additional Business

ANTI-TRUST STATEMENT

The Global Prebiotic Association (GPA) is a not-for-profit trade organization. The association is not organized to and may not play any role in the competitive decisions of its members or their employees, nor in any way restrict competition among members or potential members. Rather it serves as a forum for a free and open discussion of diverse opinions without in any way attempting to encourage or sanction any particular business practice.

GPA is committed to complying fully with the antitrust laws.

MEMBERS

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WHAT IS A PREBIOTIC?

GPA defines a prebiotic as *“A product or ingredient that is utilized in the microbiota producing a health or performance benefit.”*

A prebiotic effect is *“A health or performance benefit that arises from alteration of the composition and/or activity of the microbiota, as a direct or indirect result of the utilization of a specific and well-defined product or ingredient by microorganisms.”*

GENERAL UPDATES: EXECUTIVE DIRECTOR LEN MONHEIT

- Update from recent events
 - FNCE, VF Asia, FNCE, CHFA Expo East (Tania)
- New members and membership pipeline
- Upcoming presentations and presence

PREBIOTIC SHOWCASE

- **SSW: Booth #5036**
 - Co-exhibitors: Step Change, Carbiotix

Request for Samples for Prebiotic Showcase – IFT next up:

- In preparation for the upcoming trade shows, we are looking to replenish samples that are displayed on the prebiotic showcase at GPA's booths.
- As board members, the opportunity to provide samples for trade shows is offered to you at no cost.





2024 ASSOCIATION PRIORITY INITIATIVES

2024 PRIORITIES

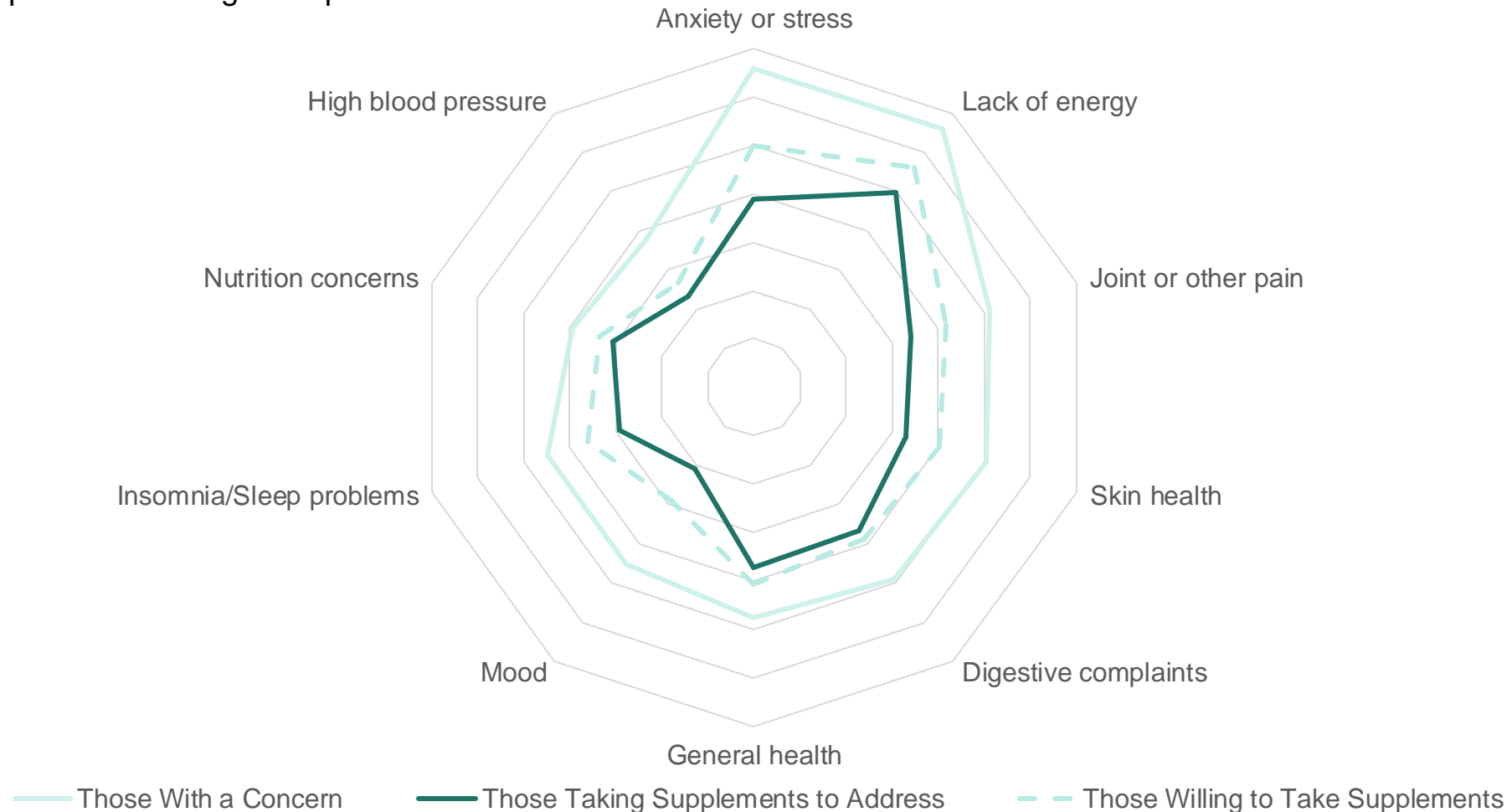
- Definition paper
- Standards of evidence
- Health Canada monograph
- HCP 101 Guide
- Young Researcher Awards
- Prebiotic Verified
- Global Prebiotics Week
- EU Task Force
- Membership Growth
- Education and thought leadership, influencer engagement
- Synbiotics

HEALTH CONCERNS: PREBIOTIC, TOP 10



Key Insights:

- The top two reported health concerns among prebiotic users are mental health concerns.
- Here we can more clearly see the gap between those currently treating with supplements and those willing to treat with supplements among the top 10 health concerns.

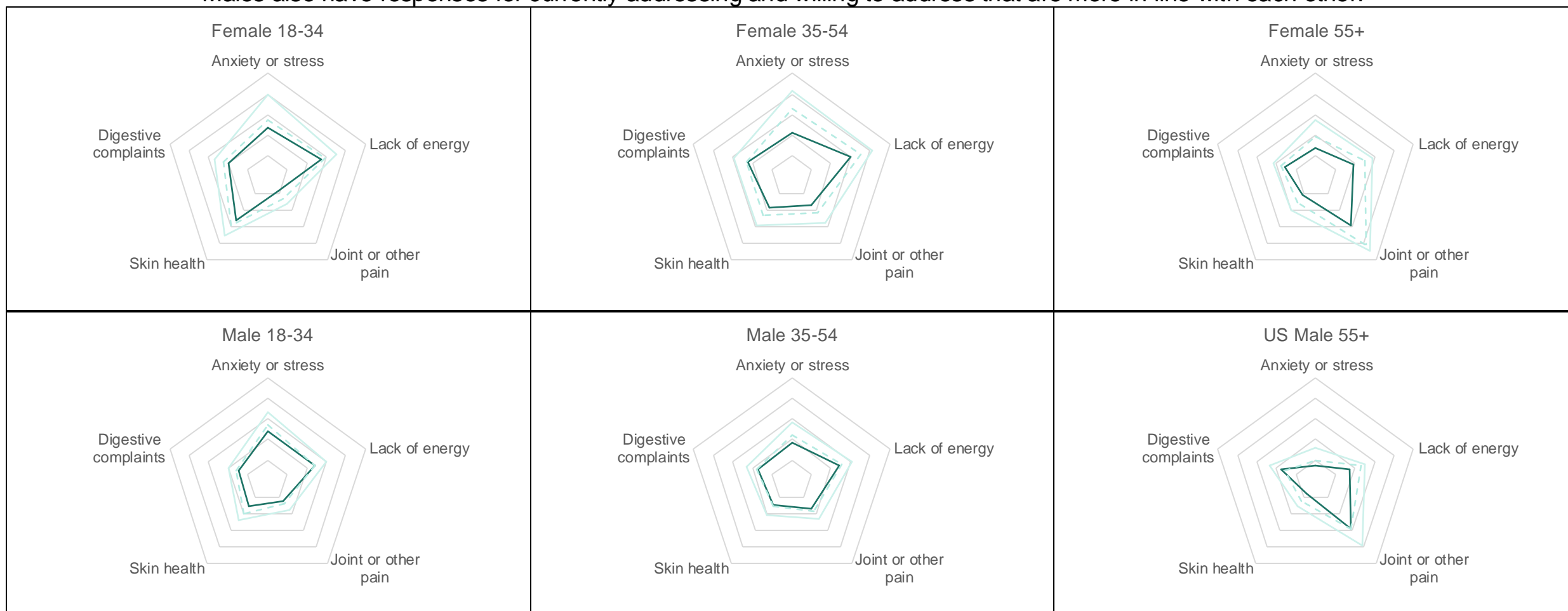


HEALTH CONCERNS: PREBIOTIC AGE & GENDER, SUPPLEMENT USAGE AND WILLINGNESS TO USE



Key Insights:

- When sorting by age & gender we can see the mental health concerns are heavily driven by younger females, and those over 55 more concerned with aging related concerns such as joint or other pain.
- Males also have responses for currently addressing and willing to address that are more in line with each other.



— Those With a Concern — Those Taking Supplements to Address - - - Those Willing to Take Supplements

GLOBAL PREBIOTICS WEEK - NOV 3-9

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**GLOBAL
PREBIOTICS
WEEK** | Nov. 3-9
Powering the Microbiome



**JOIN THE CONVERSATION
ON SOCIAL MEDIA:**

**#POWERINGTHEMICROBIOME
#GPW #PREBIOTICS**



<https://www.awarenessdays.com/awareness-days-calendar/global-prebiotics-week-2024/>

Members so far:

- Steven Riley – Clasado
- Stephan Platner – Iprona
- Damien Guillemet – Nexira
- Peter Justen/John Deaton – ADM
- Caroline Perreau/Clementine Thabuis – Roquette

Additional Volunteers being sought

MEMBERSHIP GROWTH

- The imperative of 50
- What's the mix
 - Ingredients, brands, services
 - Geographical mix – the Asia gap

- LinkedIn as a primary channel – 2969 followers
 - Can we hit 3500 or 4000 by EOY?
 - GOED has 4K, IPA has 10K
- ✓ Webinars 3 + per year (1 Webinar + 1 Symposium)
- ✓ Content -2 white papers, definition paper, infographics (2-3), earned media
- ✓ Conferences and events (NI, FOM, VF Asia, CIFST)
- ✓ Practitioners and influencers
- ✓ Our stake in synbiotics
- ✓ Communication of accomplishments
- ✓ External relationships of quality – ISAPP, IADSA, CHFA, ILSI, CMA, INM



COMMITTEE UPDATES

Purpose: To focus on mapping the world to create a more favorable and transparent regulatory environment for prebiotics globally.

Prebiotics Monograph

- Provided a detailed plan for the development of a Prebiotics Monograph to Health Canada in January and met with them in March.
- Outline included GPA's proposed approach, areas of focus, claims, dose, and supporting evidence.
- Shared goal of creating a comprehensive and science-backed monograph that aligns with regulatory requirements and contributes to public health.
- Connected with Health Canada at Probiota and shared the draft Definition Paper with them. They indicated that the review process will continue throughout this year, with a tentative release date of early 2025.

Database and Resource Guide

- Live document that is updated as new information becomes available.
- Work towards populating gap areas (e.g., African countries, India, Israel, LATAM, Middle East, etc.)
- Available to members only: <https://prebioticassociation.org/prebiotic-regulatory-guide/>

SCIENTIFIC & TECHNICAL COMMITTEE

- Owners of the scientific database, Mendeley
- Provides guidance and review to the Communications Committee
- Oversees the Young Researcher Grant Program
- Offers input into the NutraStrong™ Prebiotic Verified Program
- Category stewardship (i.e., Stribling and Ibrahim (2023) response)
- **Synbiotics Working Group**
 - March Spotlight
 - Content Development: Convert Synbiotics Infographic to a full Technical White Paper for SupplySide West.
- **Prebiotic Definition Paper Working Group**
 - Multiple audiences are interested in GPA's definition, which includes **action and activity**, but they cannot cite it until it is published.
 - Reviewed by ISAPP and external stakeholders. Draft shared with Health Canada. Submitted to *Advances in Nutrition* and received critical feedback.
- **Prebiotic Type Spotlights** (i.e., Resistant Maltodextrin and Tagatose coming up. Performance Benefit under discussion). Located: <https://prebioticassociation.org/prebiotic-resource-guide/>
- Collaboration with other associations like CHFA, CIFST, CMA, IADSA, ILSI, ISAPP, etc.

SYNBIOTICS

More than just probiotics • prebiotics

Synbiotics are mixtures of live or inanimate microorganisms co-administered with substrate(s) selectively utilized by either the co-administered microorganism or the host's indigenous microorganisms, conferring a health or performance benefit.

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TWO TYPES OF SYNBIOTICS:

- 1 COMPLIMENTARY**
 Comprise one or more live or inanimate microorganisms co-administered with a substrate that independently work in the formulation to generate a health benefit that is additive.
- 2 SYNERGISTIC**
 Comprise a substrate that is utilized selectively by the co-administered live or inanimate microorganisms, yielding a significant combined benefit.

DID YOU KNOW...?

ACCESS THE
REFERENCES AND
GET THE LATEST
INDUSTRY
INSIGHTS



The global synbiotic product market size is anticipated to reach **\$1.2B by 2032**, expanding at a compound annual growth rate of 7.5% from 2022-2032.



New synbiotic launches grew an average of **41% annually** globally between 2016 and 2020.



28% of prebiotic users specifically look for a probiotic/prebiotic combination, while another **11%** are looking for the word synbiotic.

PREBIOTICASSOCIATION.ORG

BENEFITS OF SYNBIOTICS:

Synbiotics have been linked to a number of health benefits, including:



Managing inflammation



Reducing lipid profile



Weight management



Exerting antineoplastic effects (fighting cancerous cells)



Preventing and managing atopic dermatitis



Managing non-alcoholic fatty liver disease



Supporting immune function



Managing surgical infections and complications



Supporting gastrointestinal health



Enhancing cognitive health

✓ **MARCH
SPOTLIGHT**

✓ **TECHNICAL WHITE
PAPER**

□ **SYNBIOTICS
MONOGRAPH**

Revisiting the Concepts of Prebiotic and Prebiotic Effect in Light of Regulatory and Scientific Progress – A Consensus Paper from the Global Prebiotic Association (GPA)

Abstract

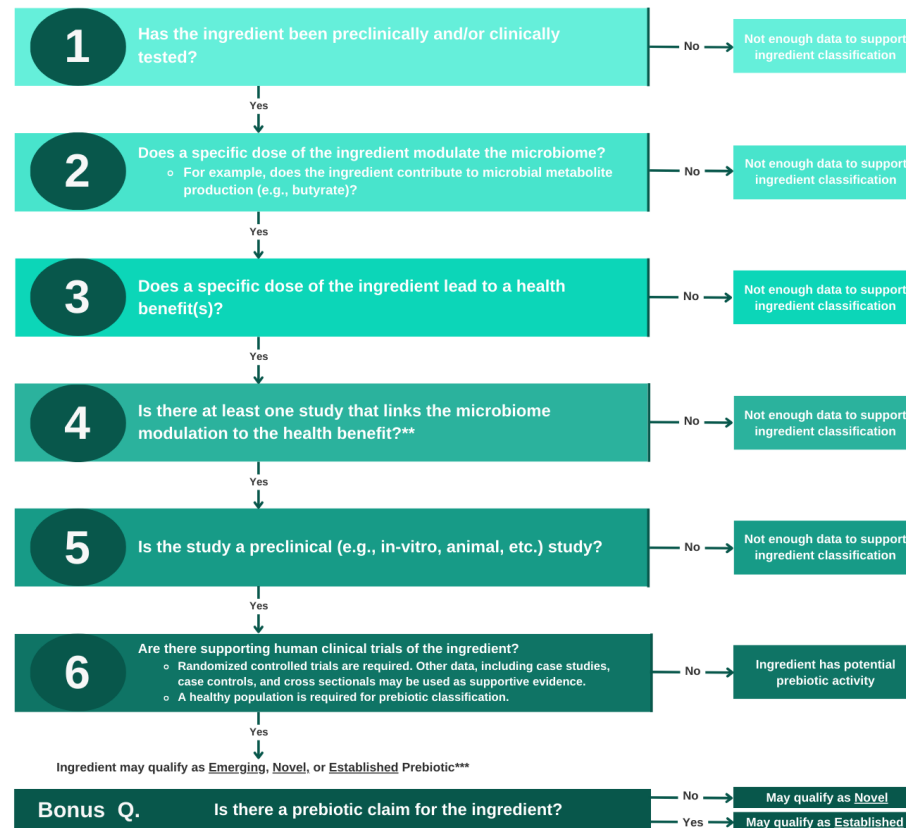
The term prebiotic has been used for almost three decades and has undergone numerous updates over the years. The scientific literature reveals that despite continuous efforts to establish a globally unified definition to guide jurisdictional regulations and product innovations, ambiguity continues to surround the terms prebiotic and prebiotic effect, leading to products that lack in full regulatory adherence being marketed worldwide. Thus, to reflect the current state of scientific research and knowledge and for the continuous advancement of the category, an update to the current prebiotic definition is warranted. This update includes removing the term selectivity, considering additional locations of action besides the gut, highlighting prebiotic performance benefits such as cognitive and athletic, and providing a clear standalone definition for prebiotic effect. The Global Prebiotic Association (GPA) is a leading information and industry hub committed to raising awareness about prebiotics, their emerging and well-established health benefits, and prebiotic product integrity and efficacy. In this position paper, GPA builds on previous prebiotic definitions to propose the following expanded definition for prebiotic: *“a component or ingredient that is utilized by the microbiota producing a health or performance benefit.”* |

In addition to prebiotic, GPA also defines prebiotic effect as: *“a health or performance benefit that arises from alteration of the composition and/or activity of the microbiota, as a direct or indirect result of the utilization of a specific and well-defined component or ingredient by microorganisms.”* With these two definitions, GPA aims to paint a clearer picture for the term prebiotic and by incorporating an industry point of view, these updated definitions may be used alongside current scientific and regulatory perspectives to move the category forward.

GPA's Standards of Evidence (SoE)

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The following questions are intended to guide the evaluation of evidence supporting the classification of a prebiotic ingredient into Emerging, Novel, or Established*



*Note that Emerging, Novel, and Established are not regulated terms. They are defined by GPA below.

**GPA acknowledges this is the ideal substantiation needed to classify an ingredient as a prebiotic. However, if not "yet" available, the ingredient may qualify as an Emerging Prebiotic, substantiated using separate clinical studies.

***Based on the number of clinical trials available. Limited clinical evidence may support ingredient classification as an Emerging Prebiotic, a few may qualify as Novel, and more may qualify as Established. This should be done on a case-by-case analysis.

Based on the # of questions answered with Yes, determine the strength of scientific evidence/substantiation supporting ingredient classification.



GPA and its members will use the SoE Flowchart for:

- GPA NutraStrong Prebiotic Verified and other deliverables, such as the Prebiotic Definition Paper, Prebiotics Monograph, and White Papers.
- GPA resource for members only.

Emerging: Research is underway for its potential as a prebiotic.

Novel: Increasing research on its potential as a prebiotic.

Established: Extensive research on its prebiotic effect.

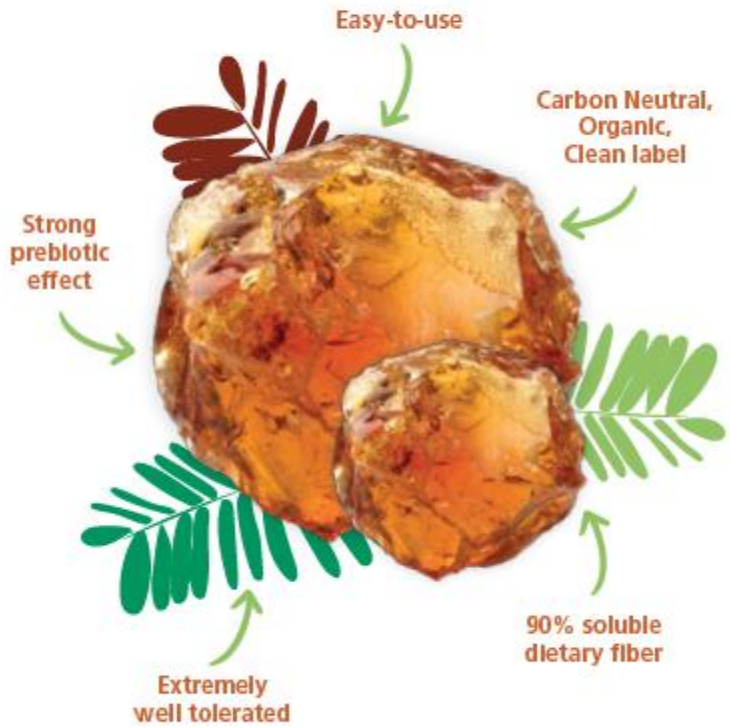
NUTRASTRONG™ PREBIOTIC VERIFIED UPDATE

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OLIPOP®



NUTRASTRONG™ PREBIOTIC VERIFIED UPDATE



Fibregum™

Fibregum™,
a bioactive
soluble fiber

- Guaranteed minimum 90% soluble dietary fiber
- All-natural
- Non-GMO
- Clean Label



OLIPOP vs. Poppi: A Dietitian Reviews Both

We break down the nutrition, ingredients, and benefits of these popular prebiotic sodas.



By Jill Corleone, RD / Published on September 30, 2024 | 5:41 PM

FACT CHECKED BY



OLIVIA TARANTINO



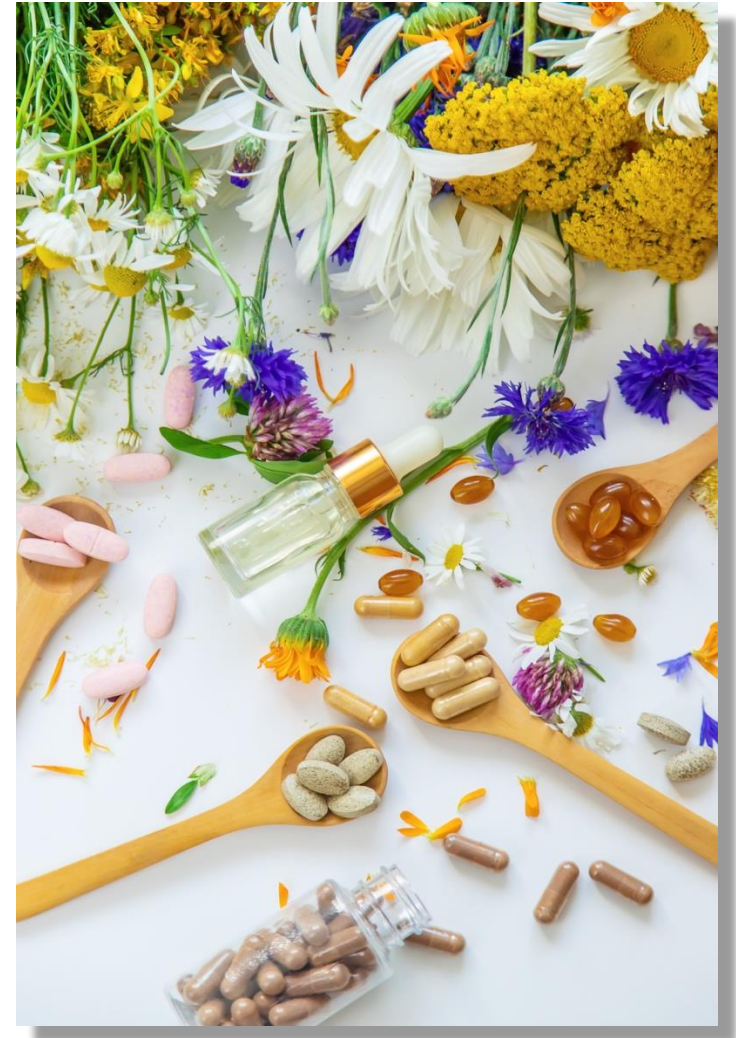
Photos: The brands. Design: Eat This, Not That!

COMMUNICATIONS COMMITTEE

- All internal and external communication
- GPA social – LinkedIn
- GPA website, member portal
- Planning and management of Global Prebiotics Week
- Insights report dissemination – next up F&B
- Tradeshow assets and promotion
- Member spotlights – 7 done

What's ahead

- HCP 101 updates for version 2.1
- Speaking engagements – CIFST, FOM
- Global Prebiotics Week
- 2025 Young Researchers



UPCOMING WEBINARS/CONFERENCES

- **Future of the Microbiome Virtual Conference**

- Dates: November 19-21
- Organized by ITC

- **Active Nutrition Webinar**

- Date: January 22, 2025
- Currently seeking speakers

A decorative graphic on the left side of the slide. It features a close-up photograph of several leeks, showing their green, ribbed leaves and pale yellow-white stalks. A large, semi-transparent teal circle is overlaid on the leeks, partially obscuring them. The circle is positioned in the middle-left of the slide.

2025 STRATEGIC PRIORITIES + KPIs

KPIs – EDIT, COMPLETE IN REAL TIME

Technical:

- Focus to include Synbiotics
- Definition and communication on both prebiotics and synbiotics
- Maintain and expand Mendeley database
- Expand pool of experts and tech advisory board
- Updates to types links

Regulatory:

- Health Canada Monograph
- Regulatory Map growth and updates
 - Maintenance and dissemination of additions/changes
- Other opportunistic dialogue

Communications:

- Social
- Webinars

A decorative image on the left side of the slide shows a rustic wooden basket filled with various vegetables, including green onions, asparagus, and a bulb of garlic. The basket is set against a background of dark green, weathered wooden planks. A large, semi-transparent teal circle is overlaid on the image, partially obscuring the vegetables.

ADDITIONAL BUSINESS



**THANK YOU FOR
YOUR ONGOING
SUPPORT**

Len Monheit
Executive Director
len@itcstrategy.com

Tania John
Science & Technical Director
tjohn@nutrasource.ca

Steve Ingmund
Communications Director
steve@itcstrategy.com

Maggie Feikes
Project Specialist
maggie@itcstrategy.com



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