

Personalised Gut Health: Is the Industry Ready for Precision Nutrition at Scale?

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Max Kushnir, Co-founder, Sova



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Gut health has never been more talked about or more misunderstood. Walk into any pharmacy, scroll through any wellness feed, and you'll find a probiotic for every occasion: stress, immunity, bloating, skin, sleep. The category is booming. But beneath the noise, a fundamental question is beginning to surface, one that separates the next generation of gut health companies from the ones still playing the old game.

For decades, nutrition operated on population-level averages. Eat more fibre. Cut sugar. Take a probiotic. While not wrong, this advice was imprecise, a blunt instrument applied to one of the most complex biological systems in the human body. The gut microbiome, which houses trillions of microorganisms unique to each individual, does not respond to generalised advice.

Here comes the real question: Is the industry actually ready to deliver on the promise of personalised nutrition? Not as a premium experiment for a few thousand early adopters, but at scale, across diverse populations, geographies, and income brackets?

The Diagnostics Shift: From Guesswork to Data

The first signal that the industry is maturing is the rapid rise of diagnostics-led nutrition platforms: companies that don't start with a product and then find a consumer but start with the individual's biology and build the intervention around it.

The logic is hard to argue with. Two people eating the same meal can have entirely different metabolic and digestive responses, a function of their unique gut microbiome, which houses trillions of organisms shaped by genetics, diet, ancestry, and environment. Population-level nutrition advice: eat more fibre, cut sugar, and add a probiotic has never accounted for this.

Diagnostics-led platforms do.

This approach is increasingly being validated. At the 13th Gut Microbiota for Health World Summit in March 2025, experts underscored advances made in microbiome-informed diagnostics and personalised nutrition.

The global precision nutrition market reached \$6.78 billion in 2024 and is projected to hit \$22.82 billion by 2032, growing at a CAGR of 16.38 per cent (DataM Intelligence, 2025). This momentum reflects something real: consumers are losing faith in generic wellness and are increasingly willing to pay for and act on data about their own bodies.

Microbiome Data Meets Product Development: A Genuine Intervention

If diagnostics are changing how we understand the consumer, microbiome data is changing how products themselves are built, and this is where the industry's readiness is being genuinely tested.

The traditional model of functional nutrition product development goes roughly like this: identify a clinically studied ingredient or strain, build a product around it, and position it for a broad health concern. It's a reasonable model, but it produces generic outcomes. A probiotic strain validated on a Western European population cohort may behave very differently in an Indian gut shaped by a completely different dietary history and microbial ecosystem.

The shift to microbiome-informed product development changes this entirely. Rather than developing for a demographic, you develop for a profile, a specific set of gut bacteria, inflammatory markers, and metabolic parameters. The product becomes a precise intervention rather than a broad bet.

The global microbiome diagnostics market was valued at \$1.82 billion in 2024, projected to reach \$6.42 billion by 2034 at a 13.4 per cent CAGR (Exactitude Consultancy, 2025). This growth is being driven not just by consumer curiosity but by companies beginning to use microbiome data as an R&D input, feeding sequencing data back into formulation decisions, strain selection, and delivery mechanisms.

This is the direction Sova has taken with SOVA-X, Asia's first personalised probiotic, a product rooted in an individual microbiome data-first approach.

The India Challenge: Scalability in a Complex Market

All of this leads to the sharpest version of the readiness question, and India is where it cuts deepest.

The market opportunity here is undeniable. According to Grand View Research, India's digestive health supplements market generated revenue of \$599.5 million in 2025 and is expected to reach \$1,582.2 million by 2033. Consumer awareness, driven by a rising burden of lifestyle diseases, increasing health literacy, and a post-pandemic focus on immunity, is accelerating.

But market size is not market readiness. And in India, the gap between the two reveals exactly where the industry needs to grow.

Infrastructure is being built, but it needs to move faster. The diagnostic ecosystem, sequencing, and data interpretation are maturing in Tier 1 cities, and affordable sequencing costs are steadily making microbiome testing more viable beyond metros. The path to national reach is forming; the industry needs to accelerate it.

India's microbiome diversity is an asset, not a complication. The Indian gut, shaped by centuries of fermented food traditions, plant-rich diets, and extraordinary regional variety, is a genuinely rich dataset waiting to be mapped. Building India-specific microbiome reference populations isn't a burden; it's a scientific opportunity that could make Indian platforms globally significant. As of today, Sova holds one of the largest Indian microbiome databases worldwide.

Affordability is solvable by design. As sequencing costs fall and AI-driven interpretation scales, the economics of personalised nutrition are improving rapidly. Sova's own journey is proof: since launching its microbiome test in 2023, costs have come down significantly, and turnaround time has been cut from 30 days to 14. This isn't a ceiling — as test volumes scale, the numbers will keep moving in the consumer's favour. Advanced gut diagnostics are no longer a luxury. They're becoming the new standard.

Gut health literacy is already rising. Indian consumers don't need to be introduced to gut health; they grew up with it through fermented foods, Ayurvedic tradition, and a cultural intuition about the gut's role in wellbeing. Companies such as Sova, The Good Bug and Bugspeaks are actively creating awareness about the significance of the gut microbiome for health. Documentaries like "Hack Your Health: The Secrets of Your Gut" (2024) by Netflix help bring microbiome science to the masses in India.

Bridging that intuition to microbiome science is a shorter leap than it might appear.

The Path Forward

So, is the industry ready? More than it's ever been — and it's building on stronger ground than most realise.

Precision nutrition in India isn't arriving in a vacuum. It's arriving in a culture that has always understood intuitively that a healthy gut is central to overall health. From fermented staples like curd and kanji to Ayurvedic traditions built around digestive balance, the Indian consumer doesn't need to be convinced that gut health matters. That belief is already there — deep-rooted, generational, and growing louder as modern lifestyle diseases give it new urgency. What precision nutrition does is give that belief a scientific backbone and a personalised path forward.

The brands that will define this category are the ones that translate complex microbiome science into the language of everyday health decisions. They'll make diagnostics feel as accessible as a routine test. And they'll show, consistently and credibly, that personalised gut health delivers outcomes that generic wellness never could.

At Sova, we believe that precision nutrition is not a premium niche; it is the future of how gut health is understood and managed at a population level.

The gut has always been where health begins. Precision nutrition is simply the most honest way we've ever had to take care of it.