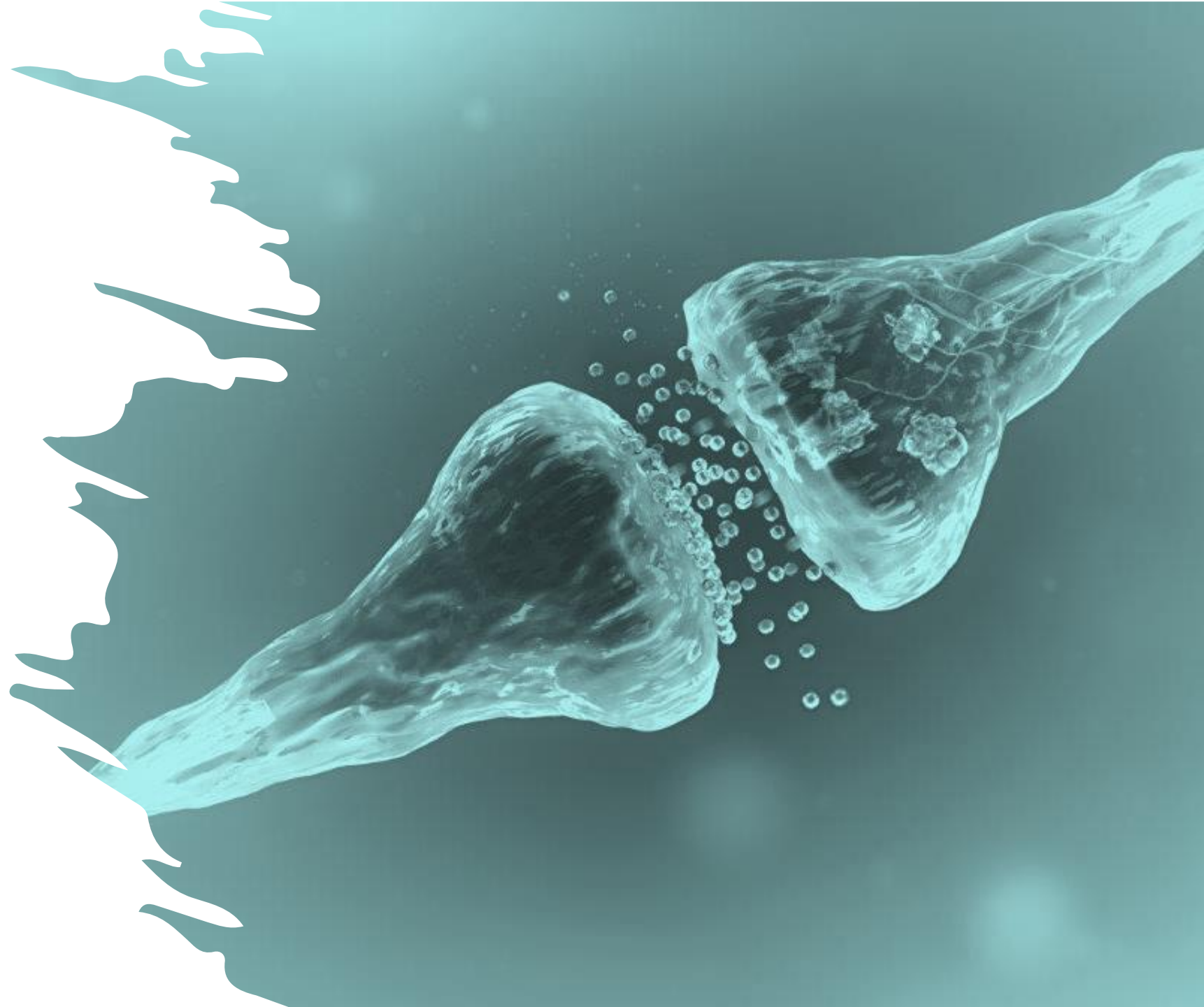


**Lumina**  
Intelligence

**Inside e-commerce as  
health crisis projects  
probiotics towards  
mainstream**

Ewa Hudson

Probiota Copenhagen, April 2022



Probiotic supplements: The global e-commerce market valued at **US\$ 1.7 billion in 2021**, up from **US\$ 928 million in 2018** (+81%)

KEY NUMBERS, 25 COUNTRIES

2020

1.5bn

E-COM Market Size,  
US\$

35%

% Growth in 2020

2021 (EST)

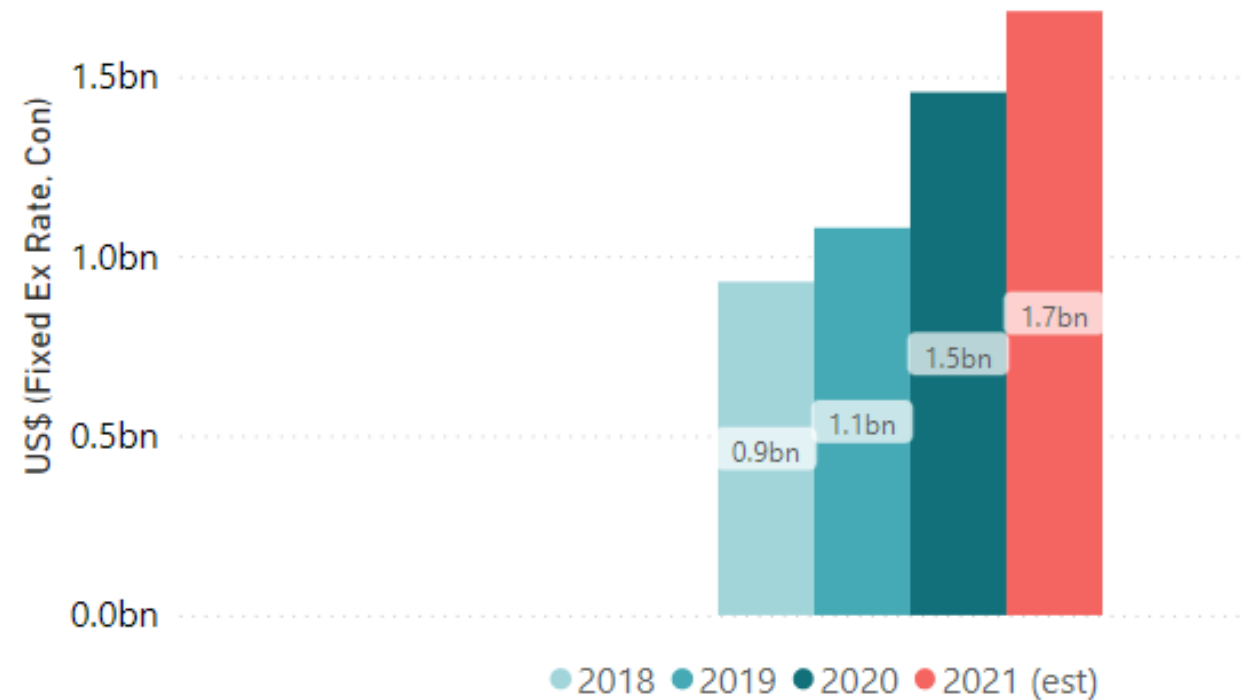
1.7bn

E-COM Market Size,  
US\$

15.5%

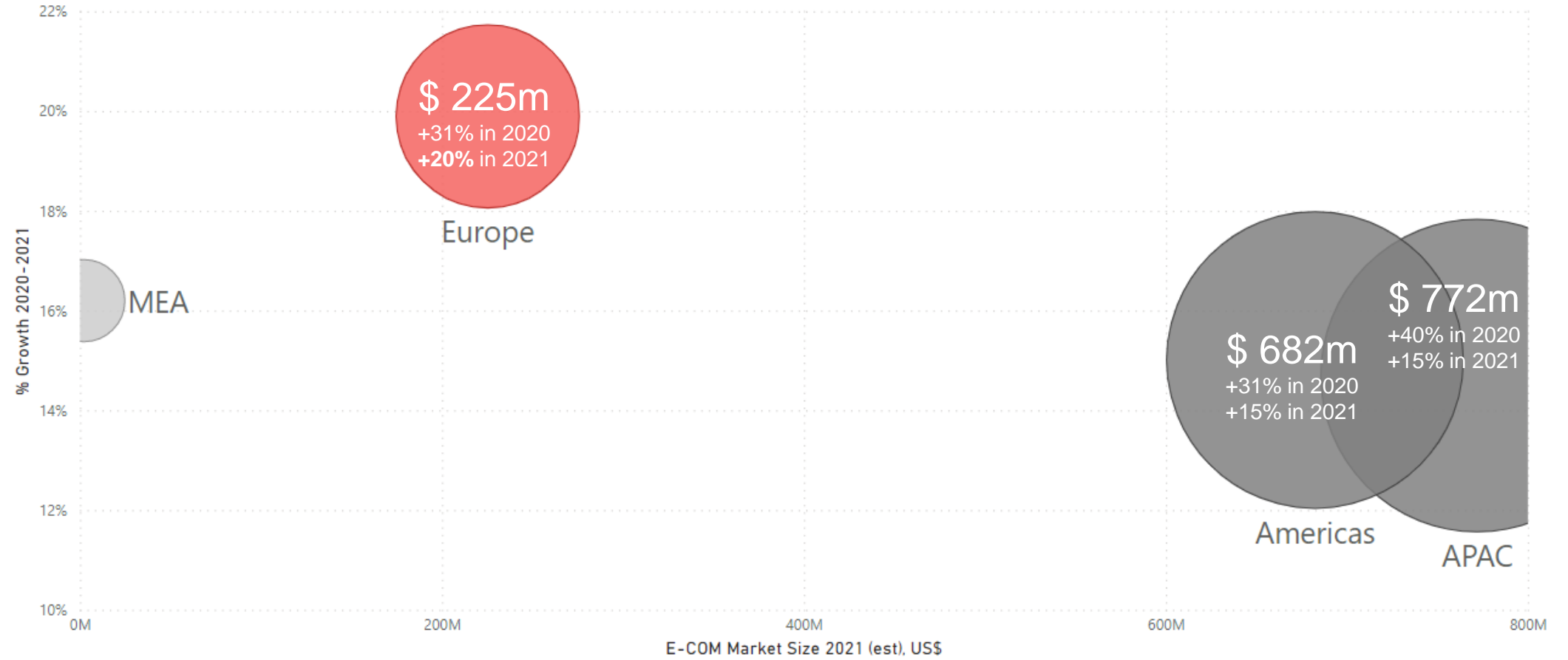
% Growth in 2021

Probiotic Supplements, E-Commerce Market Size, 2018-2021



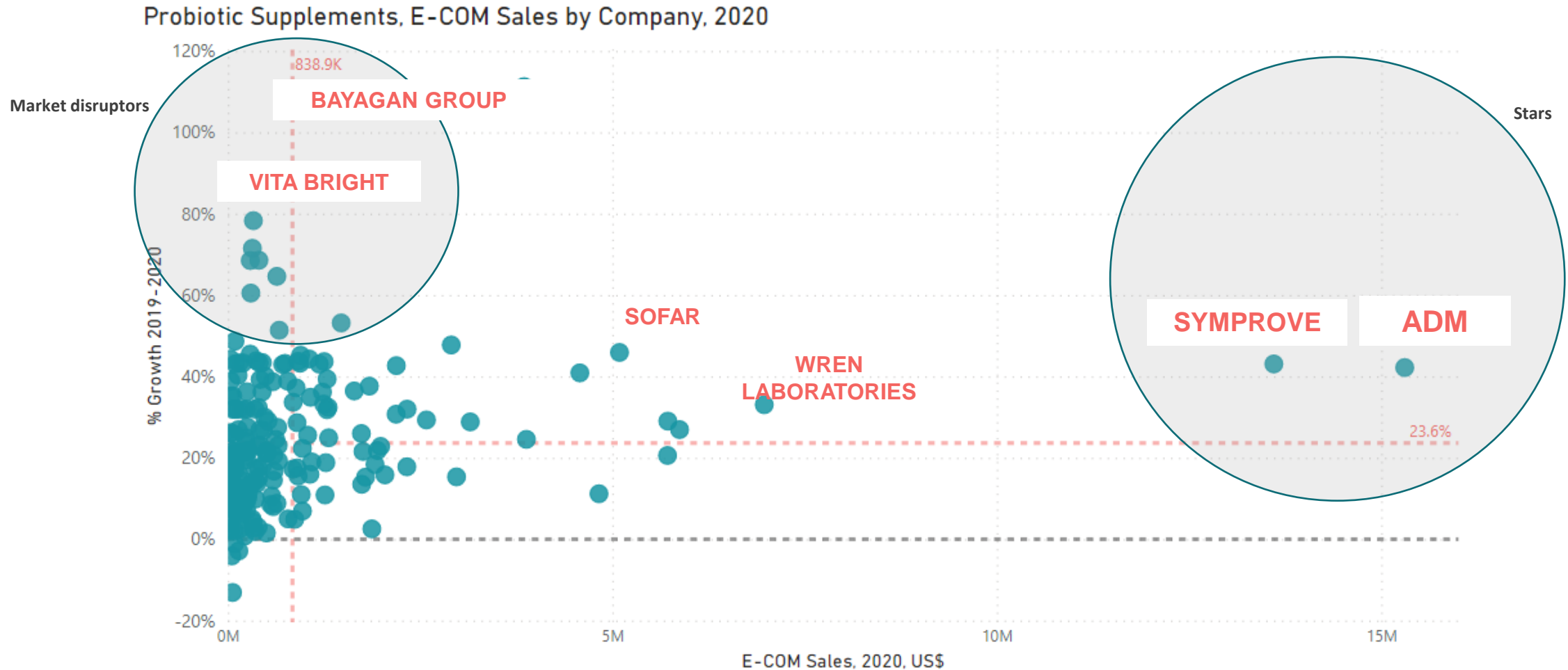
## Probiotic supplements 2021: E-com growth is driven by Europe

Probiotic Supplements by Country, E-COM Market Size and % Growth, 2021 (est)



Further insights in the report "Probiotic e-commerce: Market size and brand share insights across 20 markets" published in October 2021 <https://www.lumina-intelligence.com/>

Who performed well in Europe during the 1<sup>st</sup> year of COVID? What's changed? Amazon grows in strength. Emergence of **digital native companies and brands**, stronger position of **B2C brands** and **own websites**



Have we just seen the **probiotic BIG-BANG**? European E-COM landscape transforms in 4 years: Competition (x 2.5), innovation (x2.5), consumers expressive online (x 22)

534,000+  
REVIEWS

- 24,000 in 2017

80+ BENEFITS

- 40+ in 2017

1,700+  
PRODUCTS

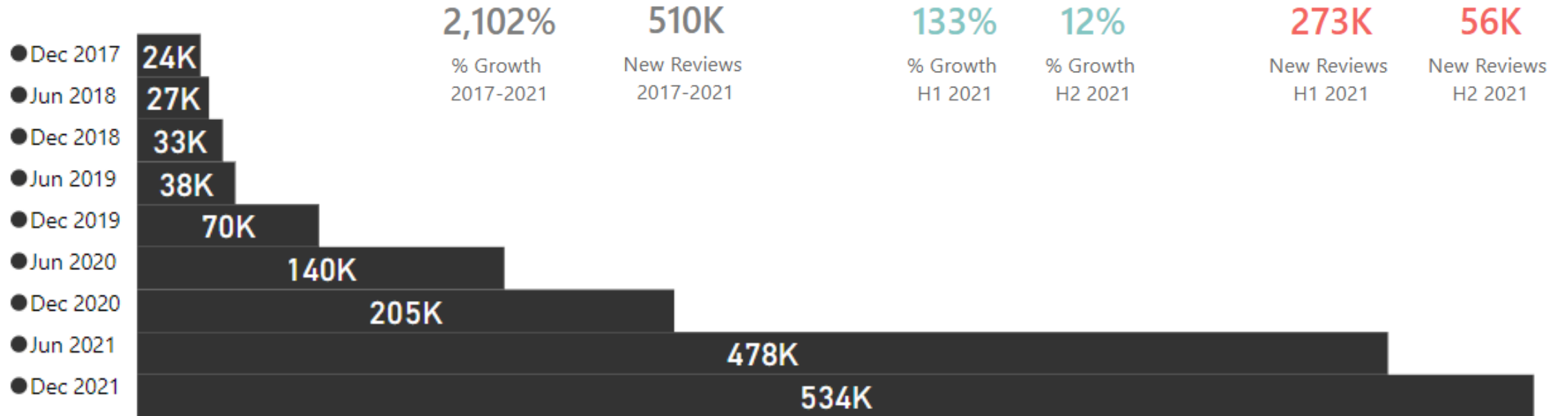
- 700+ in 2017

730+  
COMPANIES

- 300+ in 2017

To spell it black and white, customer reviews grew by **2k%** (or **510k**) with the growth **peaking in H1 2021**...but the growth rate slowed down in the H2 2021

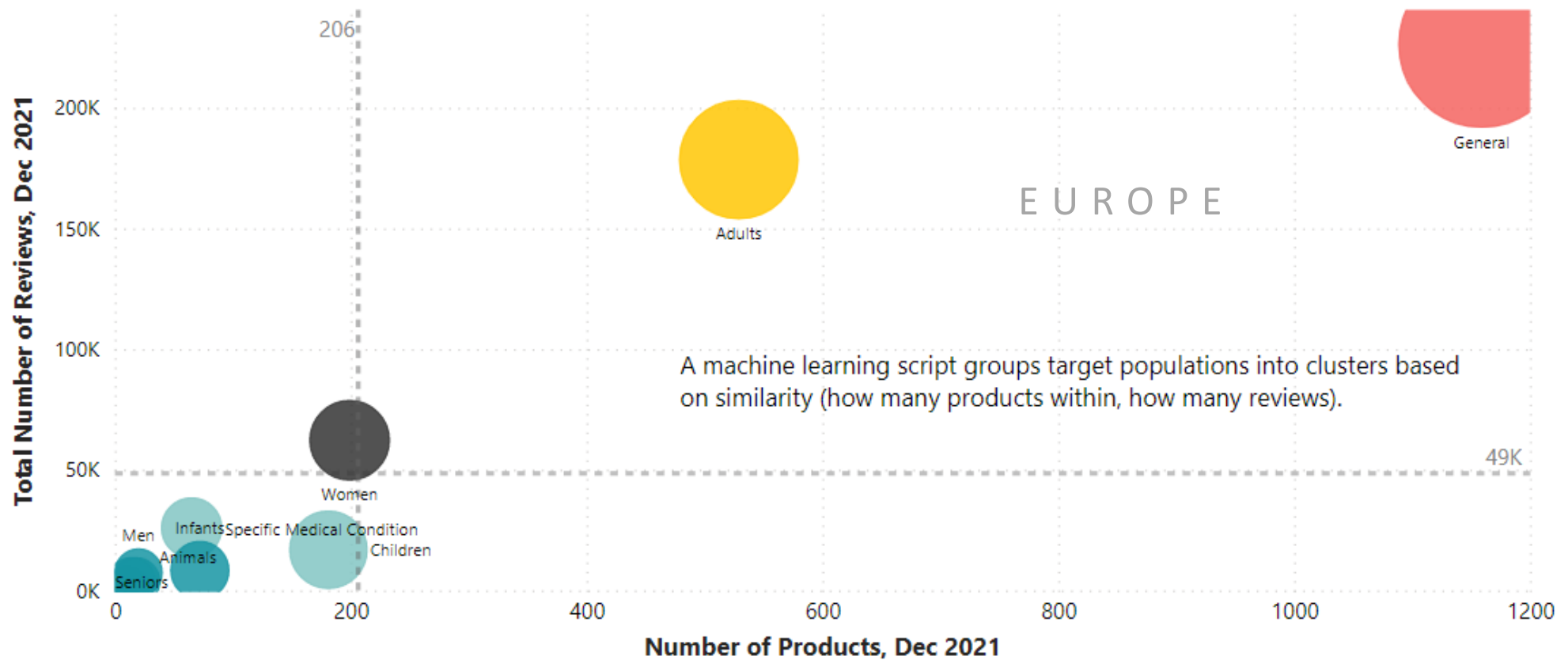
**PROBIOTICS, EUROPE, REVIEWS 2017-2021**



Strategic planning? Let's start with target populations totals, how many products versus reviews.

### Online Engagement by Target Population

5 clusters (automated) ● Cluster1 ● Cluster2 ● Cluster3 ● Cluster4 ● Cluster5

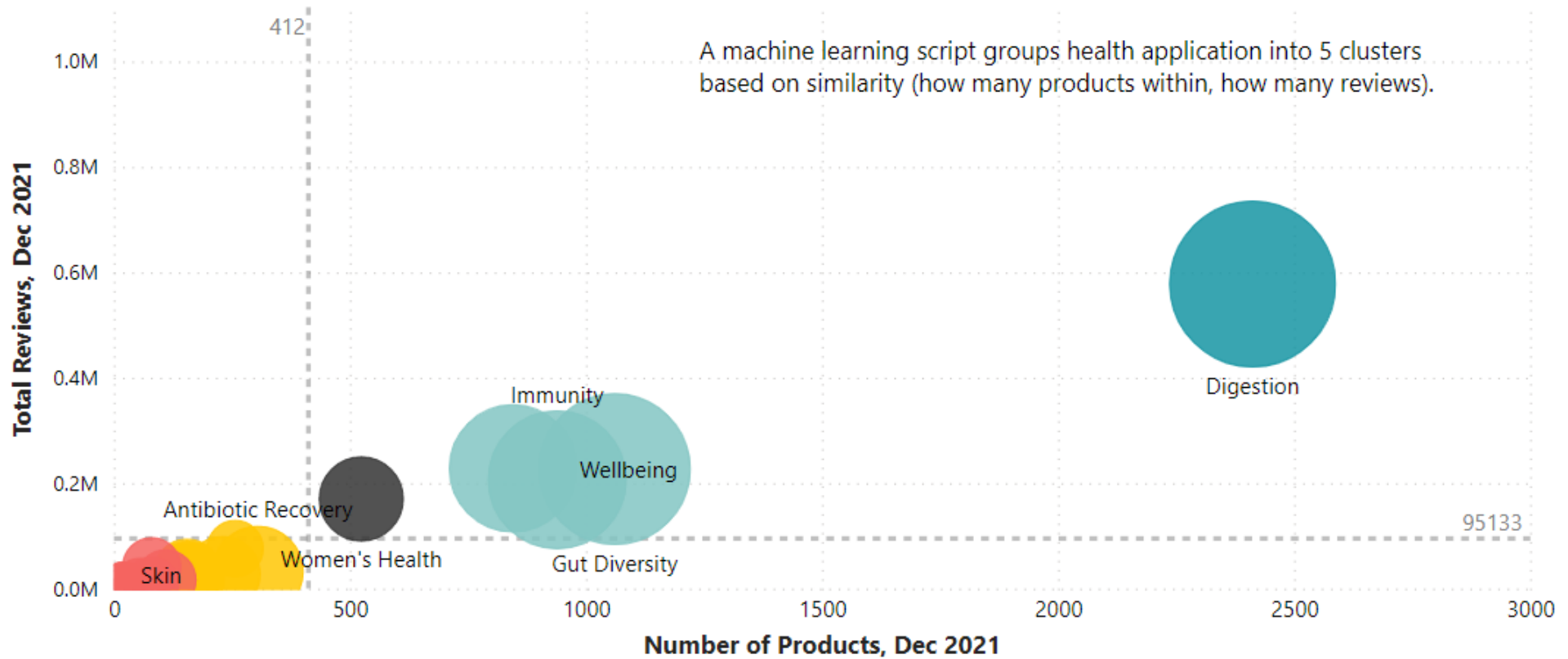


By health benefit...**Digestion** still king...**Immunity, Gut Diversity, Wellbeing and Women's Health** come next

**Top Performing Areas for Specific Probiotic Applications**

5 clusters (automated) ● Cluster1 ● Cluster2 ● Cluster3 ● Cluster4 ● Cluster5

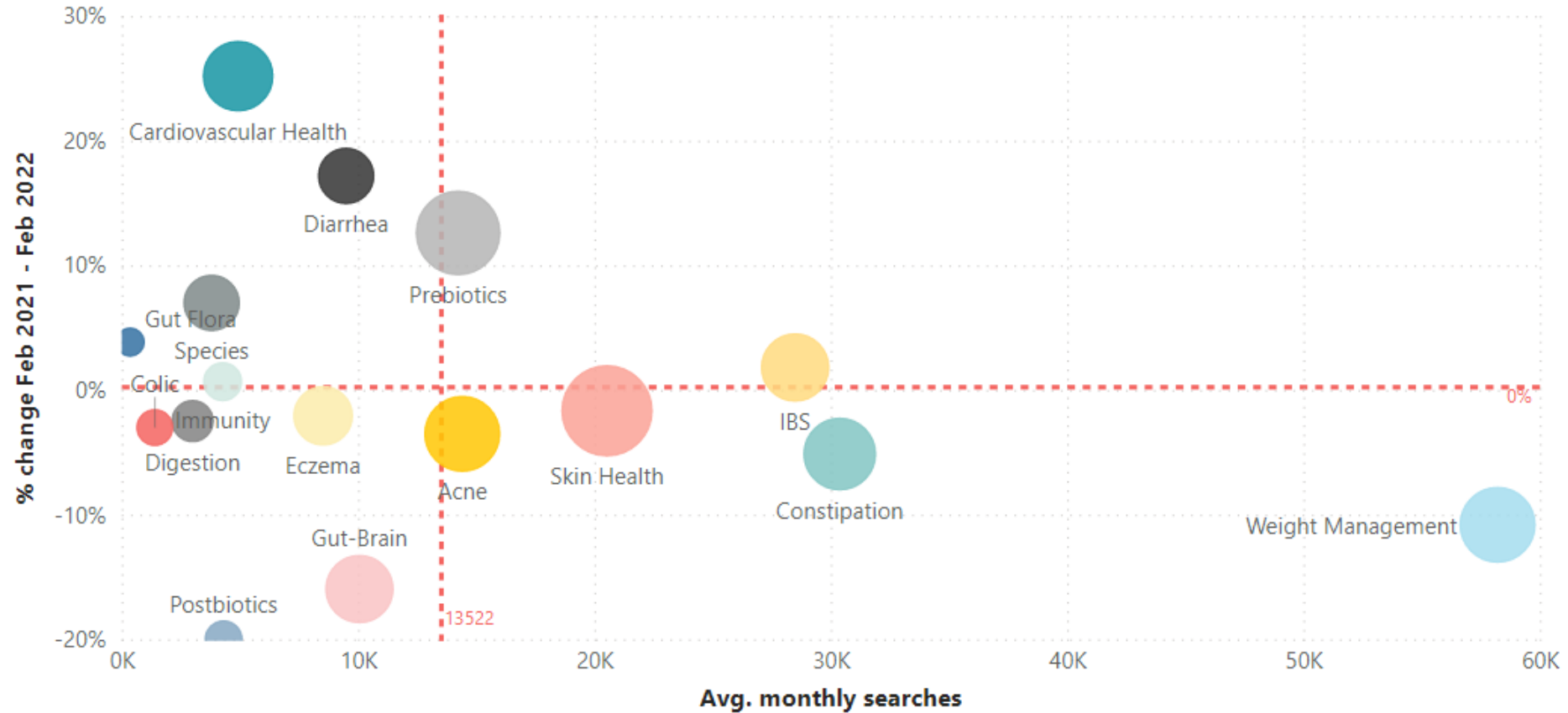
E U R O P E





Microbiome and probiotics **online search trends** (consumers usually at the pre-purchase stage) confirm rise of interest in **cardiovascular health** in last 12 months

Average monthly searches and % change Feb 2021 - Feb 2022, Keyword Group Level 1



NOTE: Size of the bubbles indicates number of keywords captured

Source: Google Trends, 12 months to Feb 2022

Search keywords around **Probiotics** confirm consumer interest in symptom- targeted probiotics, and a clear need for solid education



Source: Google Trends, 12 months to Feb 2022

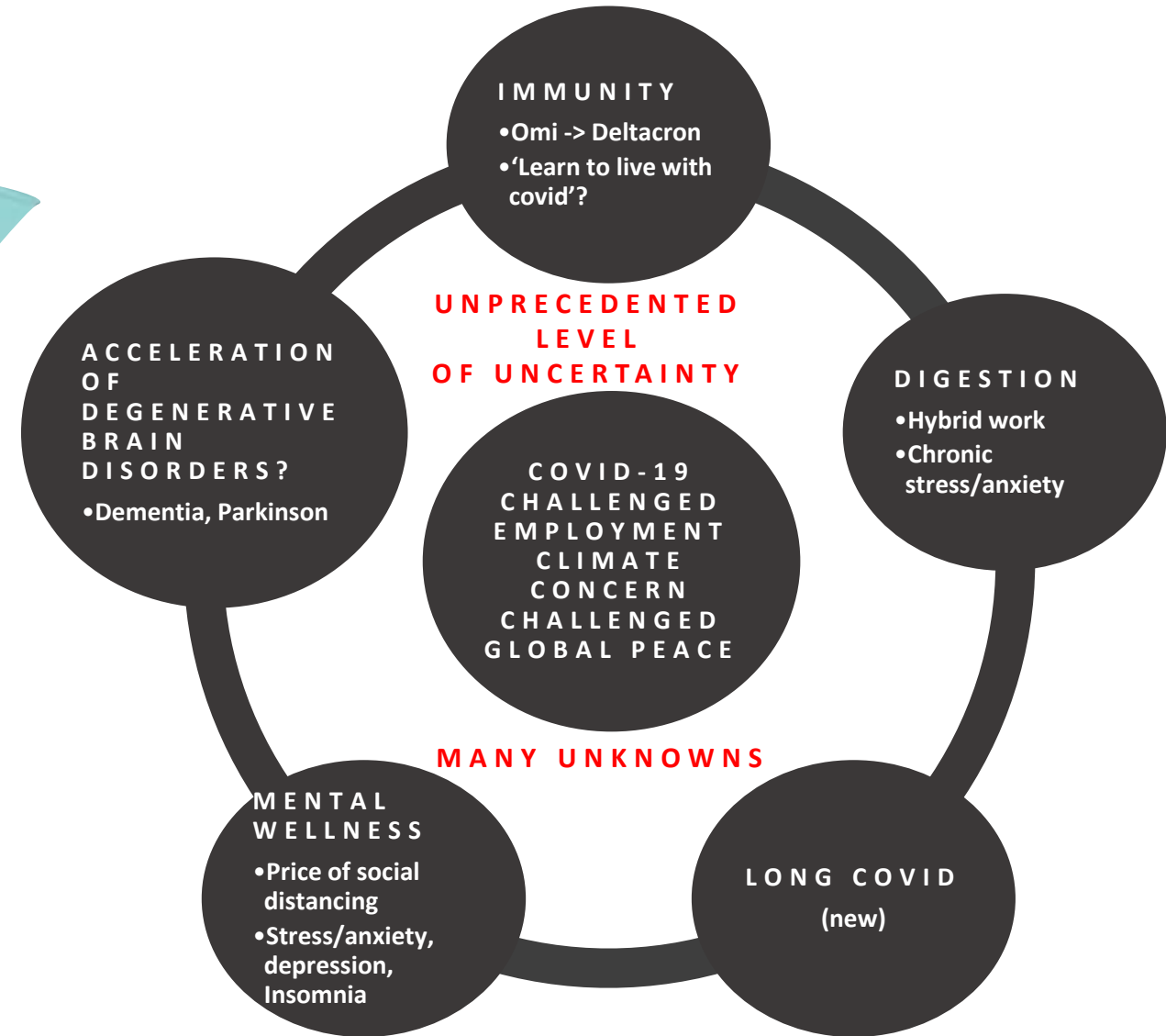
# Health in crisis. Is 'post-happy' a new normal?

**188 million people** with anxiety disorders (25 countries)

**166 million people** with depressive disorders (25 countries)

**1 billion people** with insomnia (25 countries, 7%-45% of population)

**55 million people** globally (9.1m in Europe) with dementia, expected to **double** every 20 years



**For a copy of the complete presentation or to find out more about Lumina Intelligence, get in touch with our team today.**

❖ [info@lumina-intelligence.com](mailto:info@lumina-intelligence.com)

❖ Phone: +44 (0)1293 846659

Lumina Intelligence is a unique insights service focusing exclusively on the e-commerce retail channel for the probiotics market.

Through the analyses of post-purchase reviews by customers across leading online retailers; and the detailed ingredient data and product labelling data - including format, dosages and health claims, pricing - Lumina supports you in delivering a winning NPD strategy.

A suite of interactive dashboards allows the user to drill down and find upcoming white spaces, through identifying what are the up-and-coming health benefits that the consumer wants to find solutions for; and where the opportunities are by region and country.

Our data includes probiotic supplements, juice, cosmetics and kombucha – capturing 1,400 brands and over 4000 brand variants from 25 countries. Our data has identified 150+ strains in the most reviewed probiotic supplements and 1300+ strain combinations.

Subscription to the service is on an annual basis, price dependent on number of users. Training and support is provided.

All reports are available to purchase quickly and easily online. Full details can be found at <https://www.lumina-intelligence.com/reports-probiotics/>

**We are part of William Reed – a global media company © William Reed Ltd 2022. All rights reserved.**