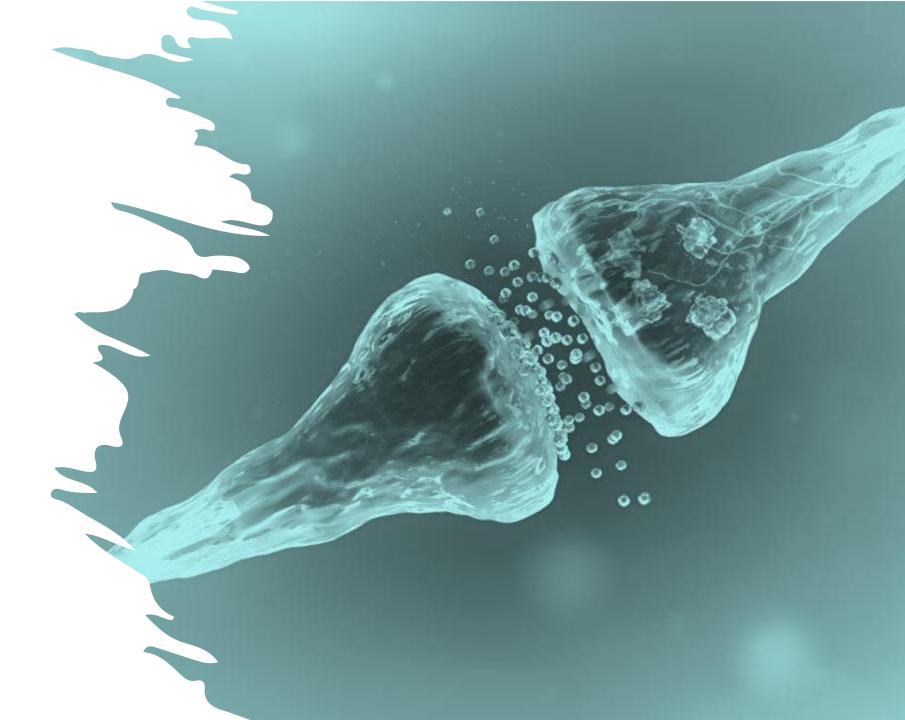
Lumina Intelligence

Inside e-commerce as health crisis projects probiotics towards mainstream

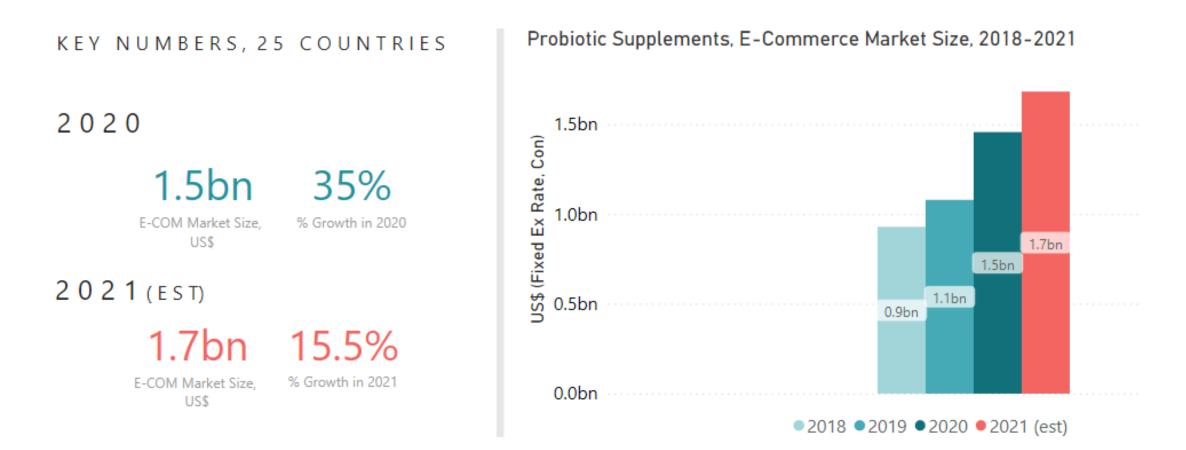
Ewa Hudson

Probiota Copenhagen, April 2022





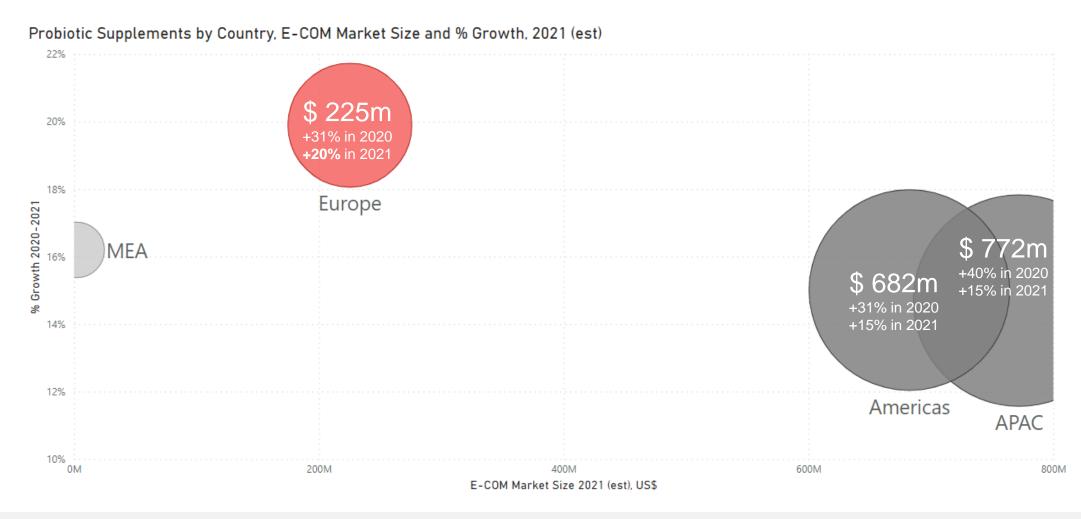
Probiotic supplements: The global e-commerce market valued at **US\$ 1.7 billion in 2021**, up from **US\$ 928 million** in 2018 (+81%)



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/



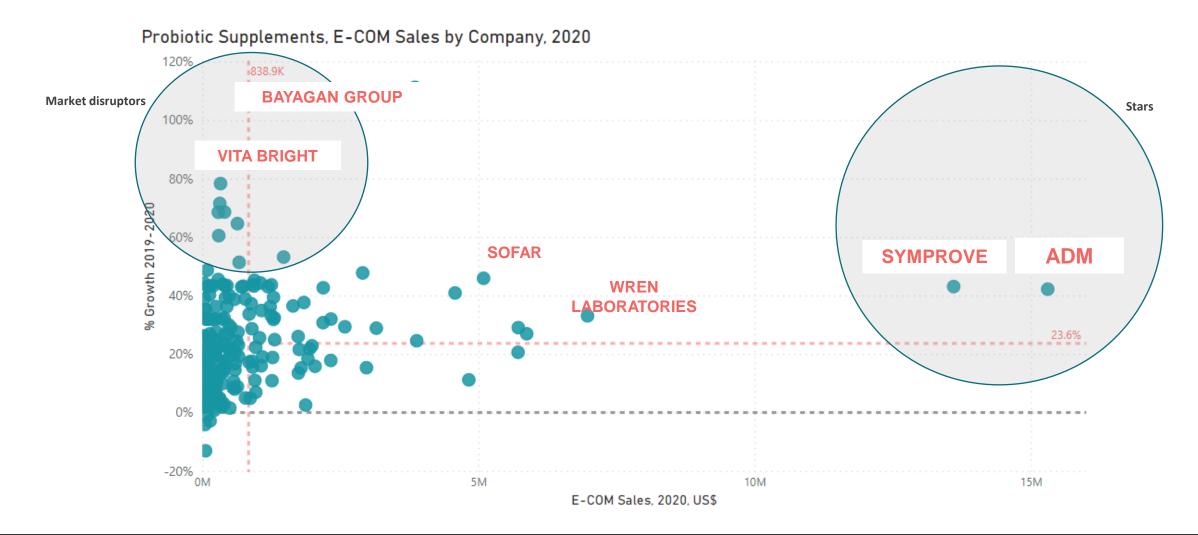
Probiotic supplements 2021: E-com growth is driven by Europe



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 1st 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**



LUmina

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

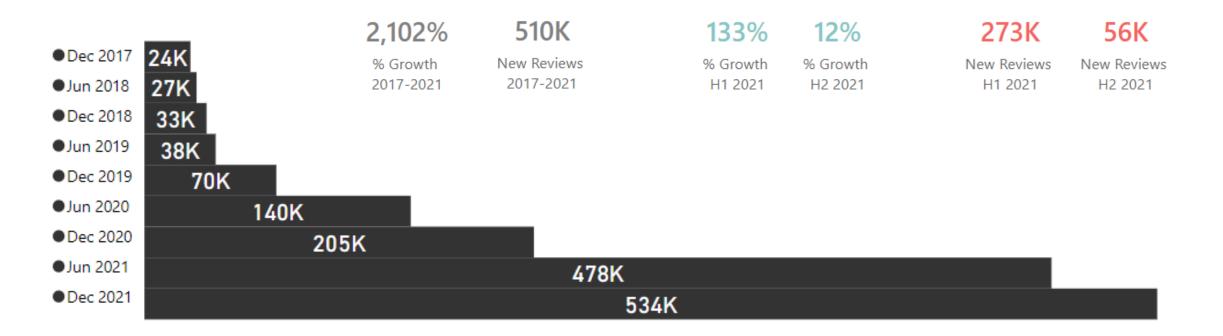
• 700+ in 2017

730+ COMPANIES



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

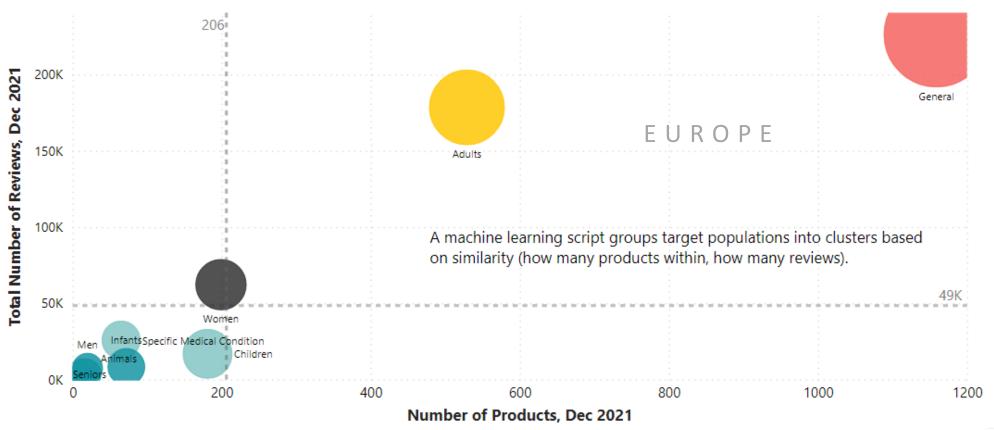




Strategic planning? Let's start with target populations totals, how many products versus reviews.

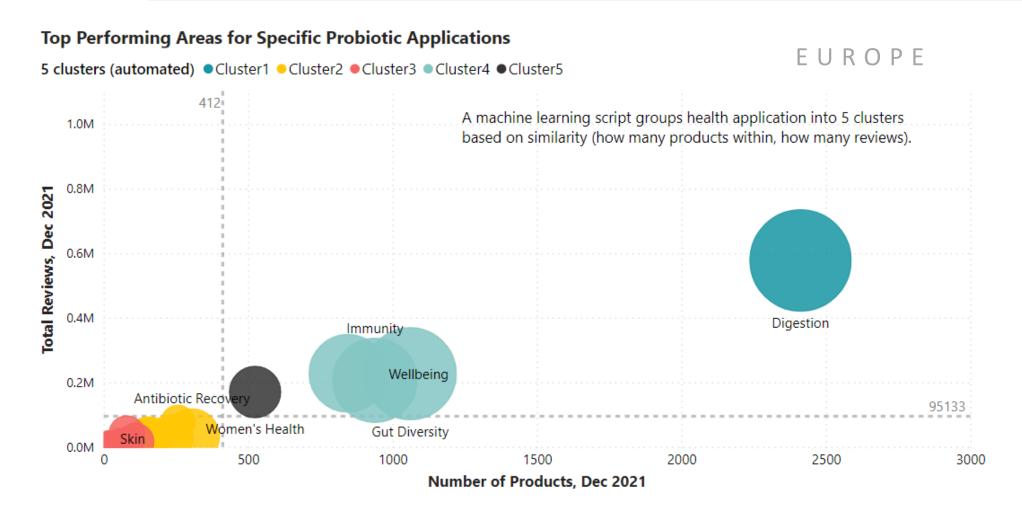
Online Engagement by Target Population

5 clusters (automated) Cluster1 Cluster2 Cluster3 Cluster4 Cluster5



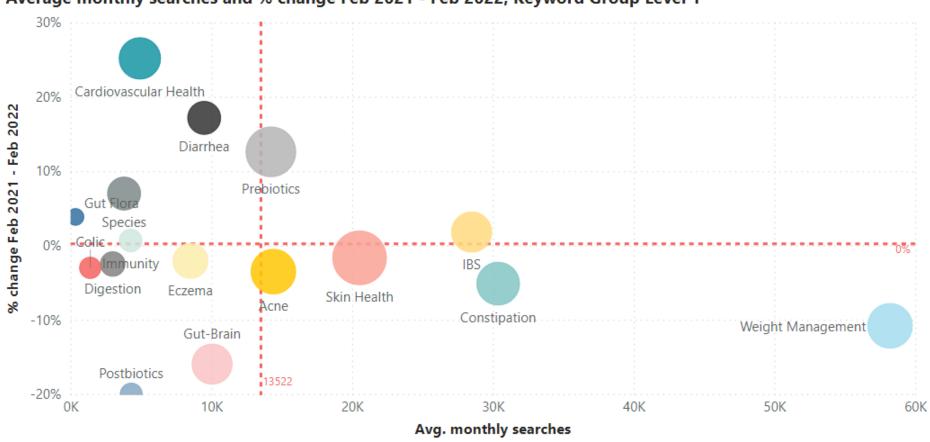


By health benefit...Digestion still king....Immunity, Gut Diversity, Wellbeing and Women's Health come next





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

gos fos prebiotics postbiotics definition are prebiotics good for you list of postbiotics best time to take probiotics for constipation probiotics for ibs uk probiotics cured my anxiety probiotics and skin best time to take probiotics for ibs probiotics side offects heart all and highlighter half probiotics and anxiety can pro Search keywords around Probiotics confirm consumer interest in symptom- targeted can probiotics cause acne probiotics, and a clear need for solid education topical probiotics for skin best probiotic for constipprebiotics for men gut flora probiotics benefits for skin do probiotics help with weight loss best probiotics benefits for skin do probiotics help with weight loss best probio prebiotics and probiotics for dogs probiotics cause constipation probiotics heart best probiotic for dogs with diarrhea postbiotic foods Can probiotics cause constipation ostbiotics supplements probiotics for gut health are probiotics good for ibs probiotics immune system probiotics for psoriasis what is postbiotics probiotics cause acne probiotics for rosacea probiotics digestive health probiotics for rosacea probiotics digestive health probiotics is probiotics for dogs probiotics for dogs probiotics for eczema probiotics for ibs d postbiotics supplements lactobacillus reuteri capsules probiotics for anxiety best probiotics for Weight loss can probiotics help with diarrhea probiotic skin care prebiotics for by probiotics itchy skin benefits of probiotics weight loss prebiotics for ibs probiotics itchy skin benefits of probiotics weight loss best probiotic for women s weight loss probiotics ibs probiotics skin rash probiotics and acne do probiotics help you lose weight what are postbiotics probiotics for dogs with diarrhea what are postbiotics probiotics for dogs with diarrhea probiotics for colic probiotic colic drops what is a postbiotic do probiotics help with acne probiotics and eczema reddit probiotics and eczema reddit probiotics for ibs c is probiotics good for ibs best probiotics for ibs uk can probiotics help acne do probiotics help with constipation do probiotics make you lose weight probiotics cholesterol probiotics for cats with diarrhea probiotics and weight loss can probiotics help you lose weight probiotics for dogs itchy skin probiotics help ibs probiotics help lose weight best probiotics to stop diarrhea probiotics weight gain best probiotic for immune system boots probiotics for ibs can probiotics help ibs are probiotics good for constipation supplements ibd probiotics for hormonal a will probiotics help ibs do probiotics give you diarrhea best probiotic for eczema probiotic for hormonal acne supplements ibd probiotics for hormonal acne supplem probiotics for hormonal acne

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

Insomnia

OF

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

IMMUNITY •Omi -> Deltacron •'Learn to live with covid'? UNPRECEDENTED LEVEL ACCELERATION **OF UNCERTAINTY** DIGESTION DEGENERATIVE •Hybrid work BRAIN • Chronic **DISORDERS**? **COVID-19** stress/anxiety CHALLENGED •Dementia, Parkinson EMPLOYMENT CLIMATE CONCERN CHALLENGED GLOBAL PEACE MANY UNKNOWNS MENTAL WELLNESS • Price of social LONG COVID distancing (new) •Stress/anxiety, depression,

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.

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ABOUT LUMINA INTELLIGENCE

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/

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