

# Biotics and The Fast Evolving European E-Commerce

Ewa Hudson

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+44 (0) 1293 846699

info@lumina-intelligence.com

www.lumina-intelligence.com

European E-COM landscape transforms in 5 years: Competition (x 2.8), innovation (x2.5), consumers expressive online (x 45)

**1,047,000+**  
**REVIEWS**  
• 24,000 in 2017

**80+ BENEFITS**  
• 40+ in 2017

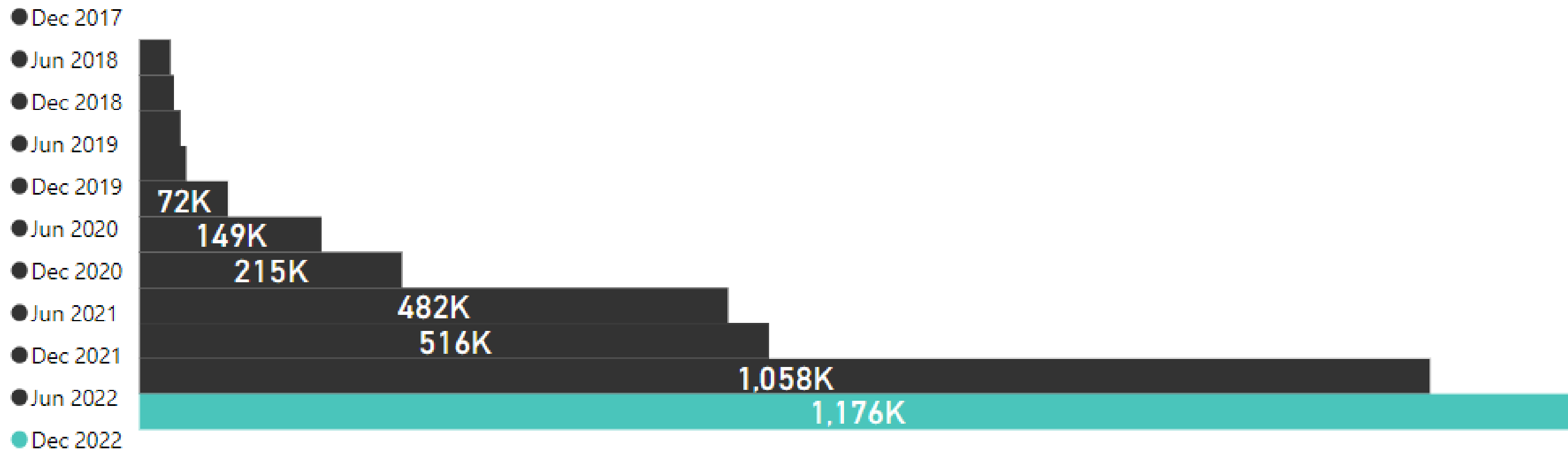
**2,000+**  
**PRODUCTS**  
• 700+ in 2017

**860+**  
**COMPANIES**  
• 300+ in 2017



Online reviews double in 2022 in Europe across probiotic supplements, cosmetics, juice and kombucha to reach 1.2 million. New product launches - a key driver.

### ALL - BIOTICS, EUROPE, REVIEWS 2017-2022



**4,542%**

% Growth  
2017-2022

**1.2M**

New Reviews  
2017-2022

**105%**

% Growth  
H1 2022

**11%**

% Growth  
H2 2022

**541.5K**

New Reviews  
H1 2022

**118K**

New Reviews  
H2 2022

Zooming in on the 8 EU countries, Lumina tracks over 1,700 products, produced by 640 companies. Consumer engagement online (expressed as product reviews) has grown between 100% and 200% per year.

## Probiotics by Health & Structure/Function Claims

### Region

- Americas
- APAC
- Europe - EU
- Europe - Non EU
- MEA

### Researched Countries

- Belgium
- Finland
- France
- Germany
- Italy
- Poland
- Spain
- Sweden

### Products captured from

- 2017
- 2019
- 2021
- 2022

### Product Status

- Present on the market
- Withdrawn (since Dec 2017)

Global Brand Owners	National Brand Owners	Brands	Products (SKUs)	Products (SKUs) (distinct)	Total Reviews Dec 2022	% Growth in 2020	% Growth in 2021	% Growth in 2022	% Growth in H1 2022	% Growth in H2 2022	Absolute Growth in H1 2022	Absolute Growth in H2 2022
641	684	814	1981	1704	0.7M	191%	179%	118%	97%	11%	333K	72K

# HEALTH & STRUCTURE / FUNCTION CLAIMS ON PACK VERSUS ON WEBSITE

Region

Europe - EU

Country

All

Category

All

Target population

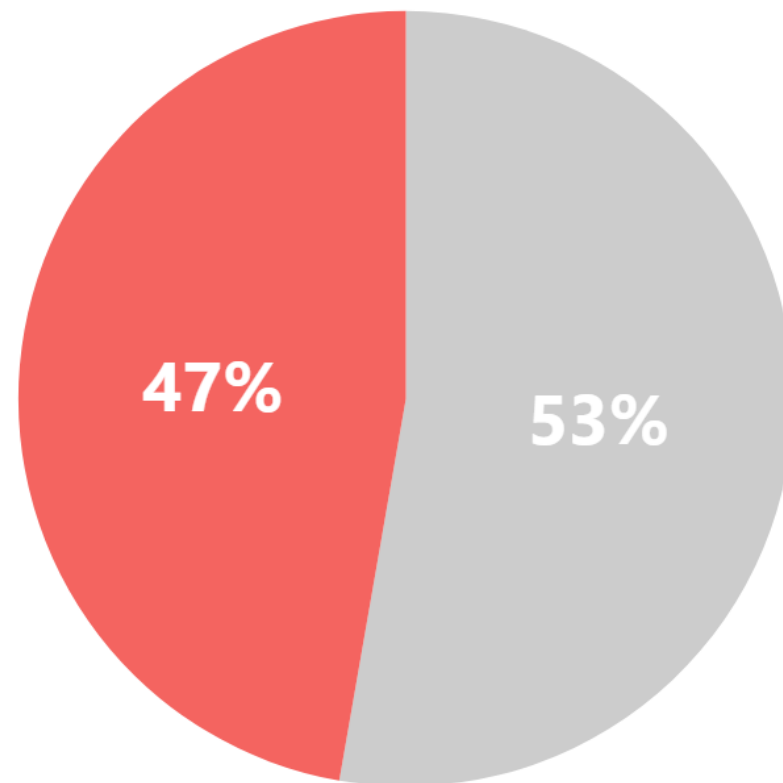
All

Products captured from

All

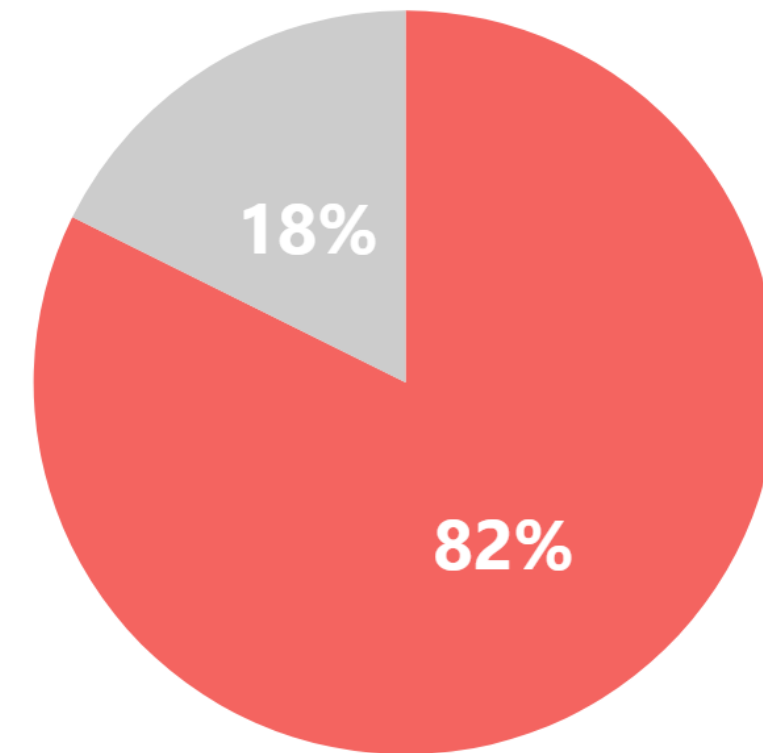
## % of Products with Health Claim on Pack

● Not Present ● Present



## % of Products with Health Claim on Website

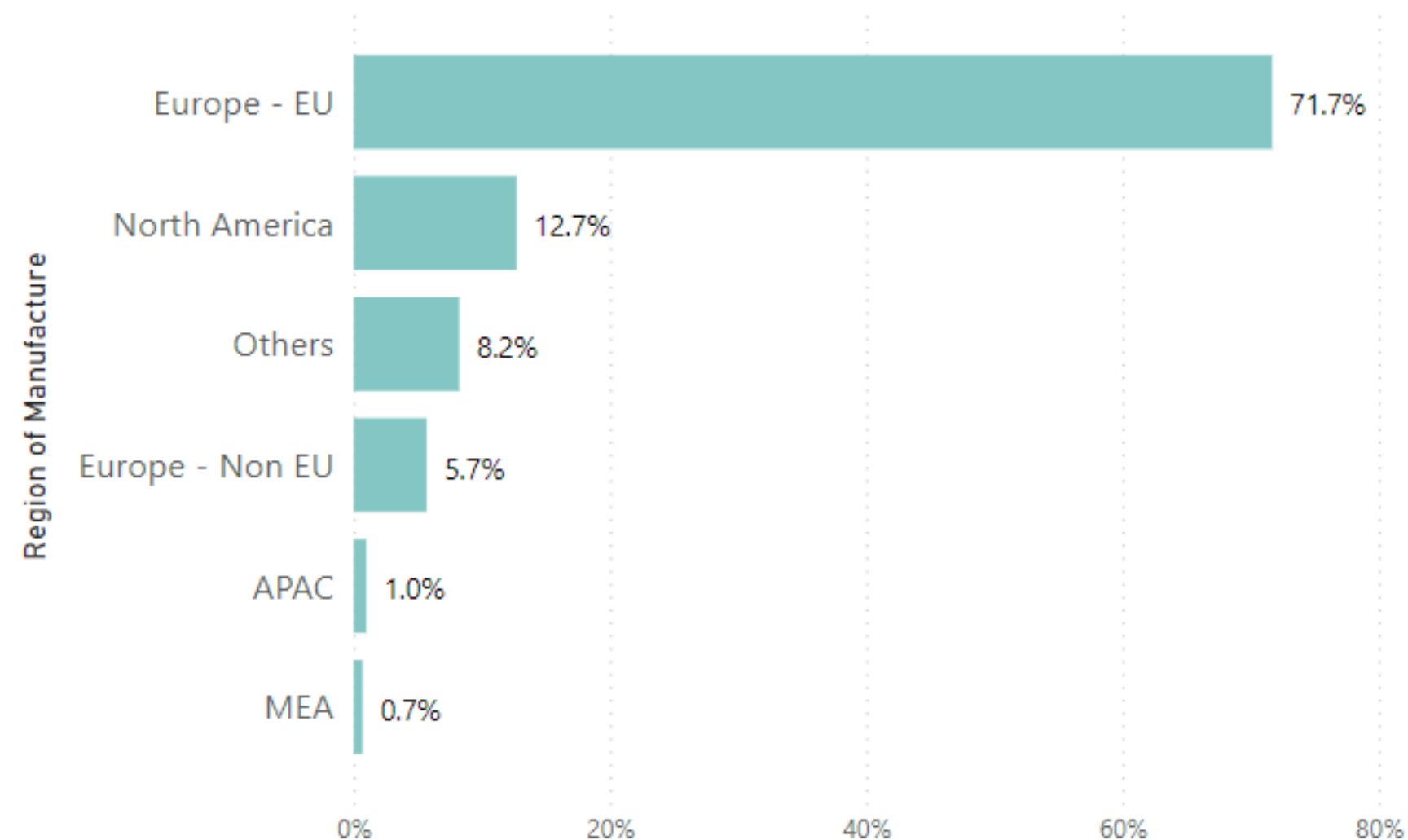
● Present ● Not present



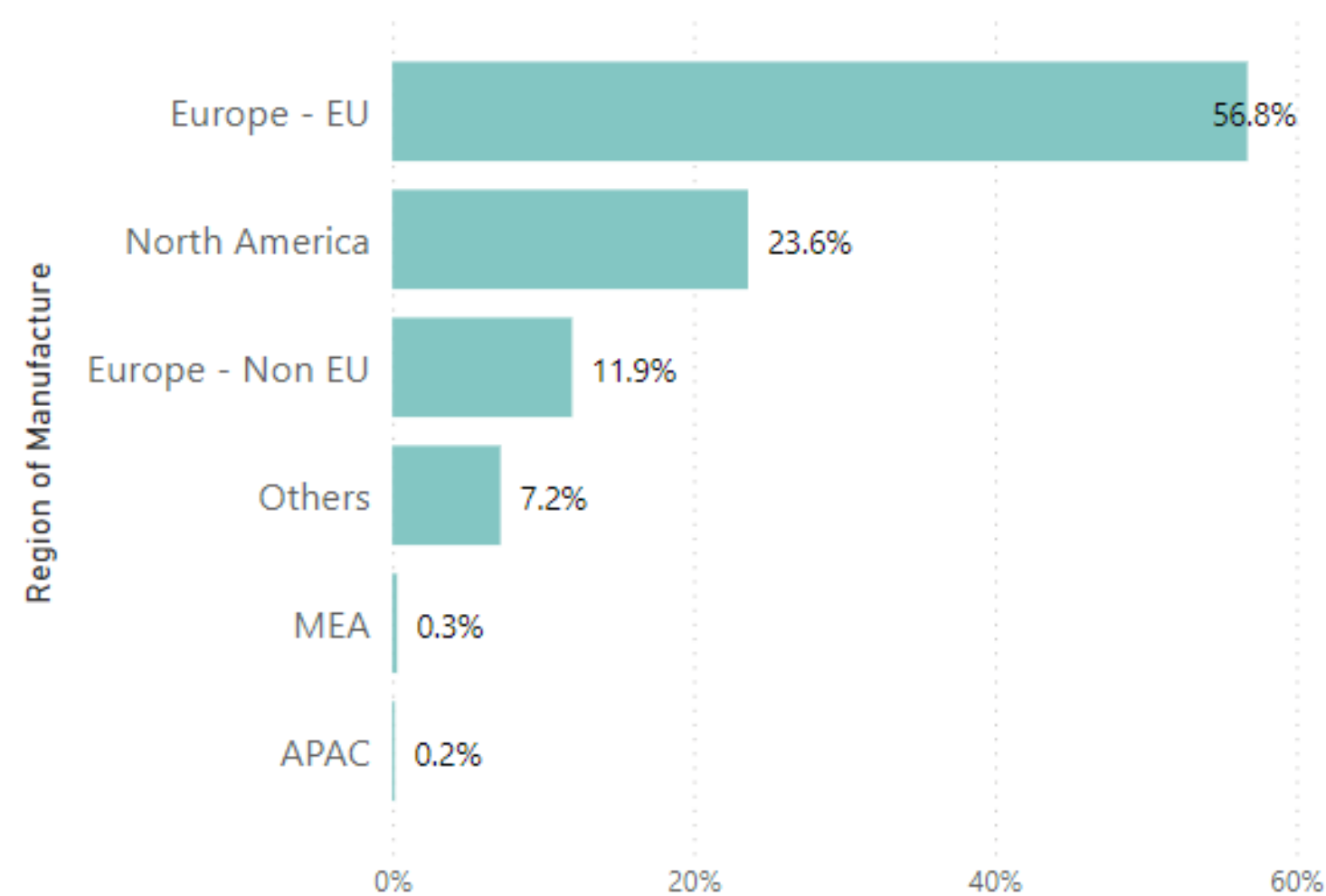
# PRODUCTS WITH CLAIMS SUPPLY VS CUSTOMER ENGAGEMENT

Region: 
 Country: 
 Category: 
 Target population:

% of Products with Claims (On Pack and/or Website) by Country of Manufacture



% of Reviews for Products with Claims by Country of Manufacture, Dec 2022



Both charts analyse products with claims only. The chart on the left maps out the supply countries based on the product origin stated on-pack, for example 'Made in USA'. Each product is counted only once, regardless of its sales volume. The chart on the right analyses customer reviews based on where products are made.

Category

Target population

Health Claim Presence

Products Captured From

All

All

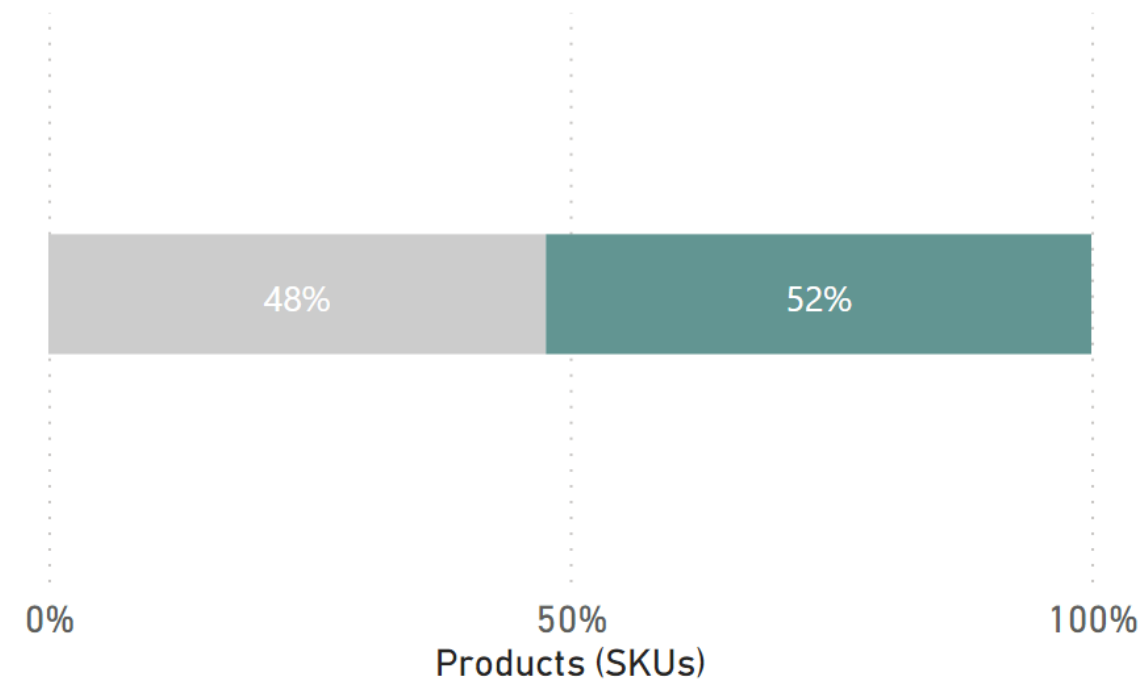
- Not Present
- Present

All

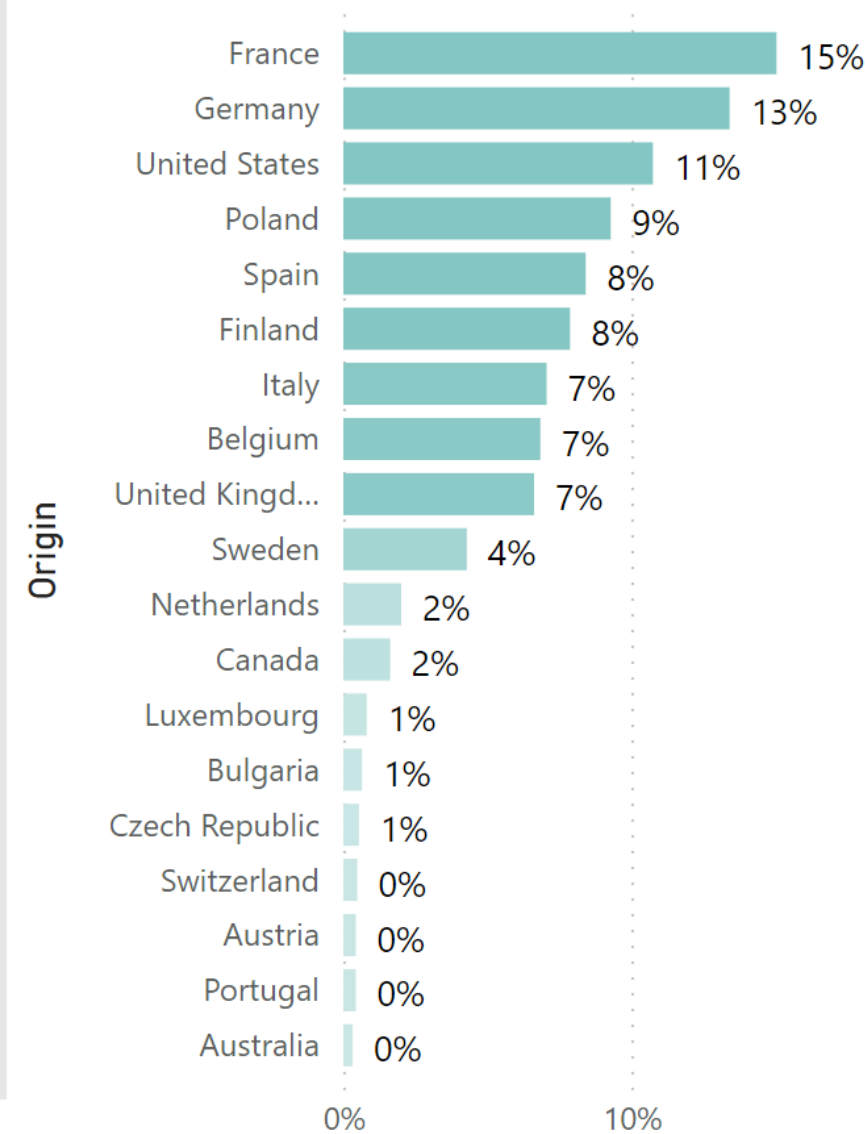
This slide analyses geographical sourcing of probiotics. Each product sold on the e-commerce market is counted **only once**, regardless of the volume sold. The origin information is collected from product packaging, for example from a claim 'Made in USA'.

% of Products by Supply Source

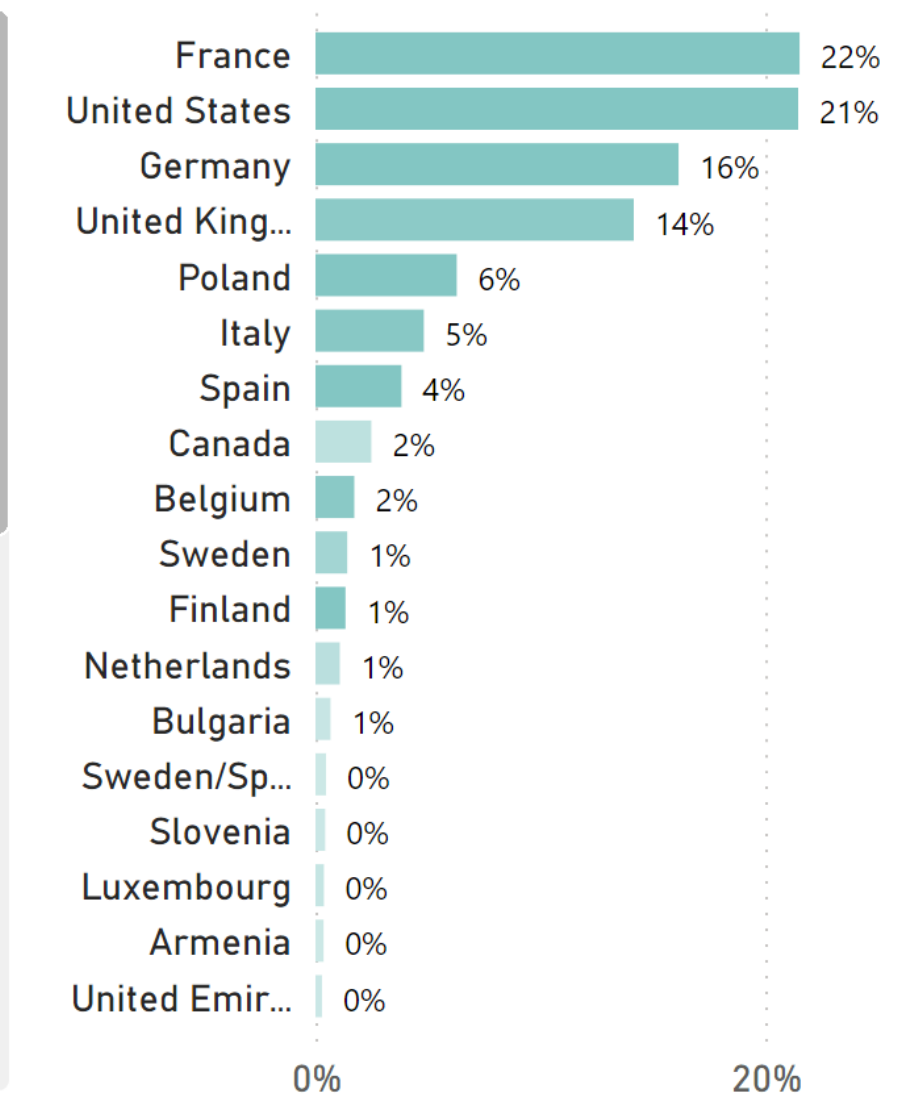
Supply Source ● International ● Local



% of Products by Origin, Dec 2022



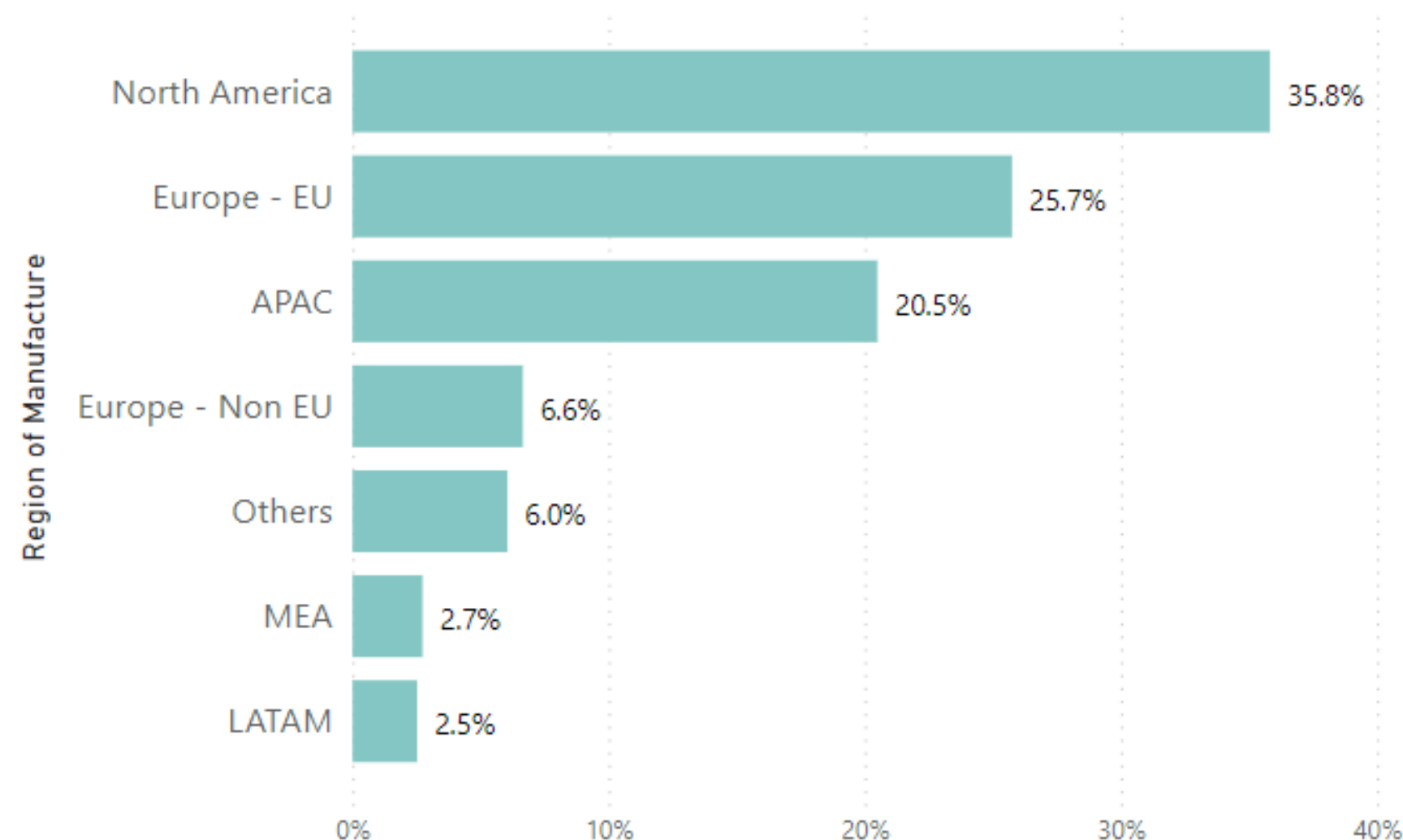
% of Reviews by Origin, Dec 2022



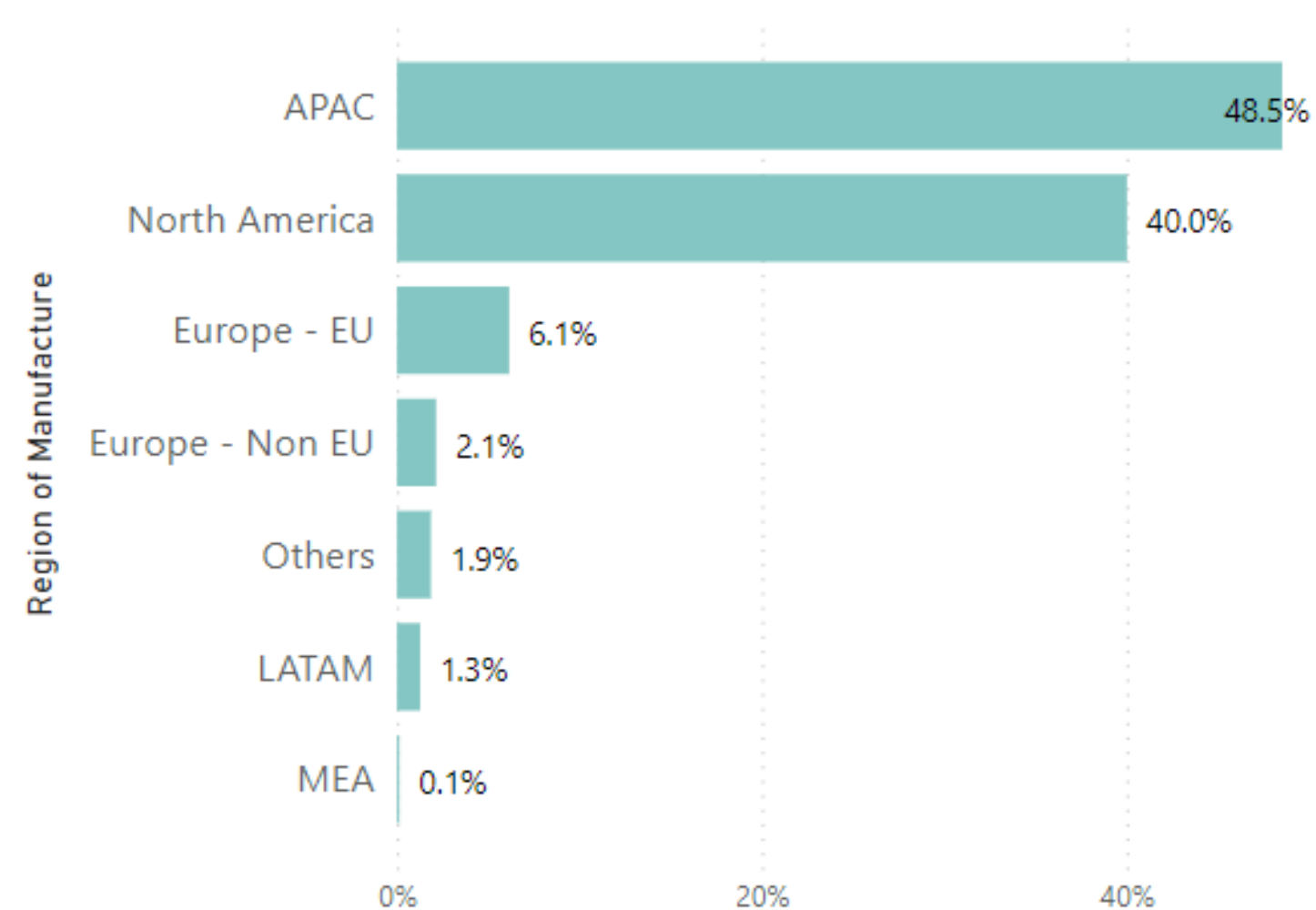
# PRODUCTS WITH CLAIMS SUPPLY VS CUSTOMER ENGAGEMENT

Region 
 Country 
 Category 
 Target population

% of Products with Claims (On Pack and/or Website) by Country of Manufacture



% of Reviews for Products with Claims by Country of Manufacture, Dec 2022



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