

INDONESIA  
**PROBIOTIC SUPPLEMENTS  
IN E-COMMERCE**  
**- STRATEGIC FACT SHEETS**

EWA HUDSON

October 2020

**Lumina**  
Intelligence



# Our full range of country reports for Asia: Available to buy online

## China: Probiotic supplements in e-commerce



China is a hotbed of probiotics activity, with the country propelling the category's growth across Asia. It accounts for 3 million online reviews – the largest in the world – with the vast majority of them overwhelmingly positive, averaging at 4.86 starts out of 5.

In this special report we detail the most popular products, brands, suppliers, strains and species in terms of online engagement and look at the target populations and health conditions that are driving engagement.

[Read more](#)

## Taiwan



Whilst Taiwan ranks 5th globally by reviews for probiotics, online engagement is driven by products targeting only five health benefits...

[Read more](#)

## South Korea



With nearly 500k reviews South Korea demonstrates a high level of online engagement with probiotics, ranking 2nd globally...

[Read more](#)

## Japan



Japan had spectacular rise in number of reviews - 972% between Dec 2017 to Jan 20, and 116% in the first half of 2020...

[Read more](#)

## Thailand



Probiotic Cosmetics had the highest growth rate in Thailand at 145%, in the 6 month period January 2020 – July 2020...

[Read more](#)

## Malaysia



The Malaysian consumer typically rates probiotic products highly online with an average star rating of 4.89 out of 5 in July 2020...

[Read more](#)

## Vietnam

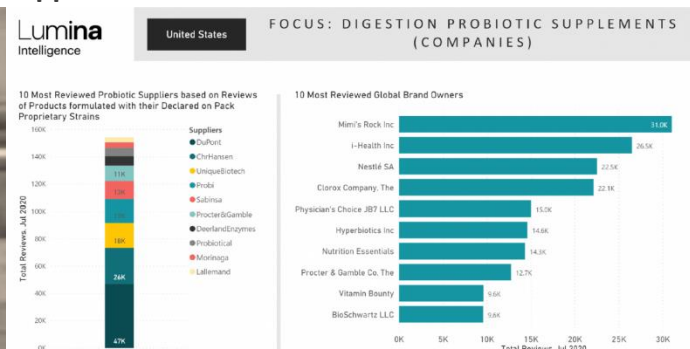


How has consumer sentiment in Vietnam evolved in the probiotic e-commerce space and how does this compare with the rest of Asia?

[Read more](#)

# Our full range of country reports for EMEA and US: Available to buy online

## USA: Probiotic supplements in e-commerce



With 46% share, the United States is already the leading probiotic supplement e-commerce market globally, based on the research of 20 key countries, and this only looks set to grow as public interest in the benefits of a healthy microbiome for immune health increases, and online shopping in general surges. As part of our new series of country fact sheets, this report looks at the drivers of the well-established probiotic supplements e-commerce marketplace in the US.

### Did you know?

- E-commerce is the place of growth for American probiotic supplements, with consumer engagement rising by 34% in the first half of 2020 to reach 307 thousand reviews (July 2020).
- While talk of pill fatigue has been ongoing for several years in the US, capsules are still the most popular format for probiotics in the US market. Capsules are used in 64% of products, but command 78% of all reviews.
- Probiotic supplements continue to be affordable within the US, with the average price at US\$28 per pack.

[Read more](#)

## Canada



Canada sees a clear rise in customer engagement with probiotics in the first half of 2020, with the reviews up by 303%...

[Read more](#)

## India



India's rapidly advancing probiotic e-commerce market sees reviews up 468% in the 6 month period January to July 2020...

[Read more](#)

## Australia



In Australia, with the number of customer reviews rises by 192% in the first half of 2020 compared to 36% in the previous six months...

[Read more](#)

## Spain



After a slow start in the adoption with e-commerce up to the end of 2018, Spain has seen an exciting acceleration of engagement...

[Read more](#)

RESEARCH SCOPE

This report is based on the online engagement with, and the ingredient and label claim information of:

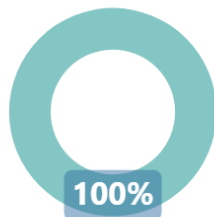
**120** tracked under **43** Brands and **41** Companies  
Products (SKUs)

Selected products are considered the bestsellers in the e-commerce.

All products (SKUs) have been tracked since January 2020 and are still available for sale.

PRODUCT AVAILABILITY STATUS

● Available



## PROBIOTIC SUPPLEMENTS IN E-COMMERCE

- **COUNTRY OVERVIEW**
- PRODUCT ANALYSIS BY
  - TARGET POPULATION
  - FORMAT
  - PRICE
  - DELIVERY SYSTEM
- HEALTH BENEFIT ANALYSIS WITH FOCUS ON
  - DIGESTION
  - IMMUNITY
  - WOMEN'S HEALTH
- HEALTH CLAIMS BY
  - ON PACK
  - ON WEBSITES
- COMPETITIVE LANDSCAPE
- SUPPLY CHAIN
- INGREDIENTS BY
  - SPECIES/STRAINS: GENERIC VERSUS PROPRIETARY
  - PREBIOTICS
  - DOSAGE
- METHODOLOGY



Indonesia consumer engagement with probiotics registered over **3.8K** customer reviews in July 2020, up by **1.3K** on January 2020, equal to growth of **52%**.

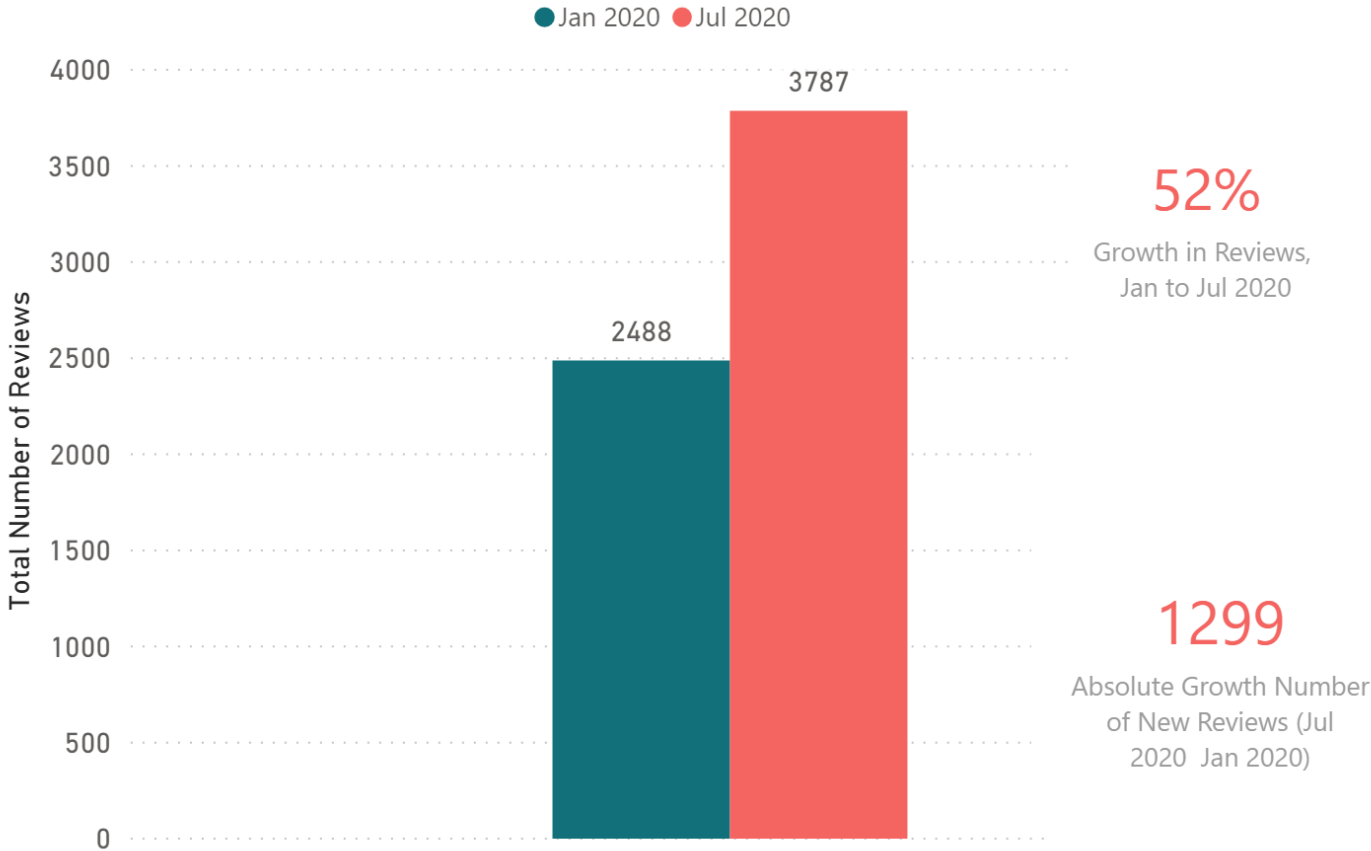
The Indonesian consumer typically rates probiotic products highly in the online space. Lumina has recorded a high average star rating, valued at **4.90** stars out of 5 in July 2020.

Probiotics, Average Star Rating, 2020



CAGR- compound annual growth rate

PROBIOTIC REVIEWS, JANUARY TO JULY 2020



The most engaging category is Probiotic Cosmetics with an average product being reviewed **80** times and receiving a star rating of **4.79** out of 5.

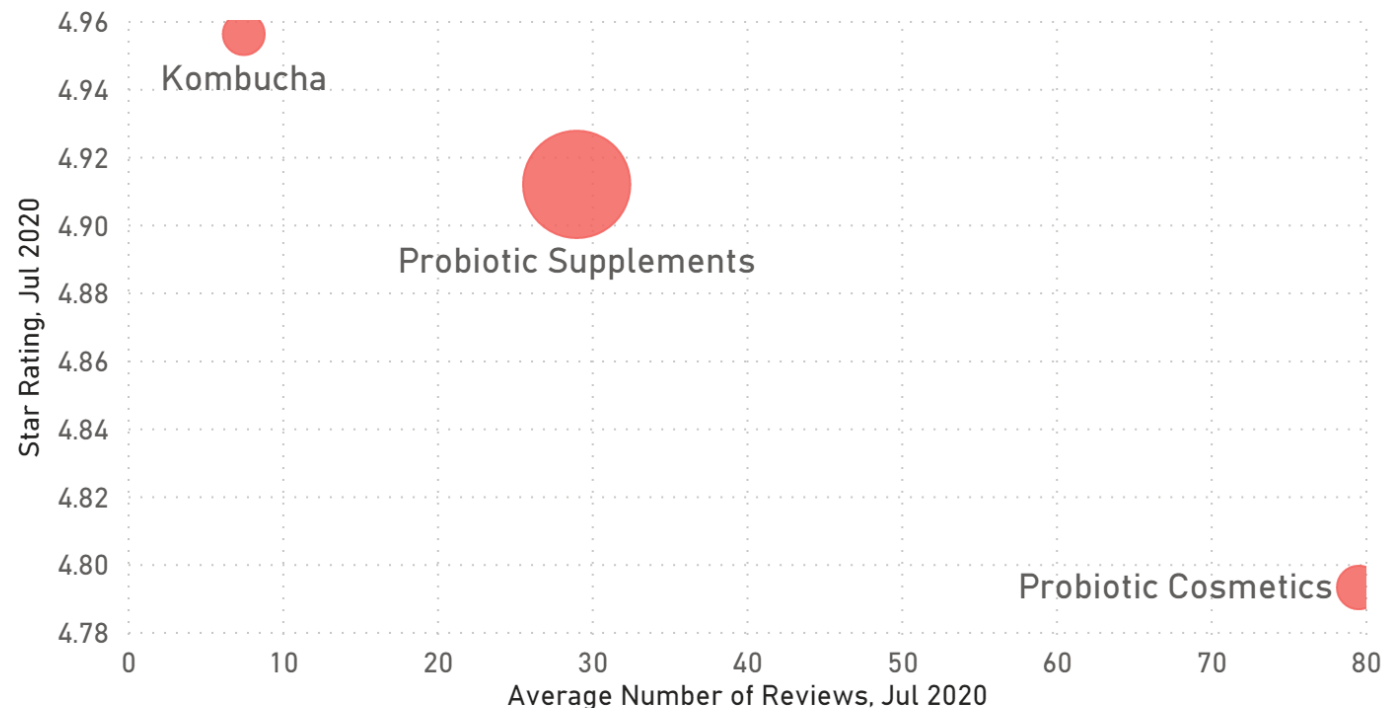
At **4.96** out of 5, the highest rated is Kombucha.

Over the review period (January 2020 to July 2020), the fastest % growth of **83%** came from Probiotic Cosmetics .

#### Probiotics by Category, 2020

Category	% Growth (Jan to Jul 2020)	Number of Reviews (Jul 2020)
Probiotic Supplements	45%	2925
Probiotic Cosmetics	83%	795
Kombucha	76%	67
<b>Total</b>	<b>52%</b>	<b>3787</b>

#### Online Engagement with Probiotics by Category



The size of the bubble denotes the number of products captured:

- probiotic supplements: 101
- probiotic cosmetics: 10
- probiotic juice: 0
- kombucha: 9

Probiotics, Average Price in the Region, 2020





## PROBIOTIC SUPPLEMENTS IN E-COMMERCE

- COUNTRY OVERVIEW
- **PRODUCT ANALYSIS BY**
  - **TARGET POPULATION**
  - **FORMAT**
  - **PRICE**
  - **DELIVERY SYSTEM**
- HEALTH BENEFIT ANALYSIS WITH FOCUS ON
  - DIGESTION
  - IMMUNITY
  - WOMEN'S HEALTH
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  - SPECIES/STRAINS: GENERIC VERSUS PROPRIETARY
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- METHODOLOGY



Indonesia's consumer engagement for probiotic supplements registered over **2.9K** customer reviews in July 2020, up by **0.9K** on January 2020, equal to the growth of **45%**.

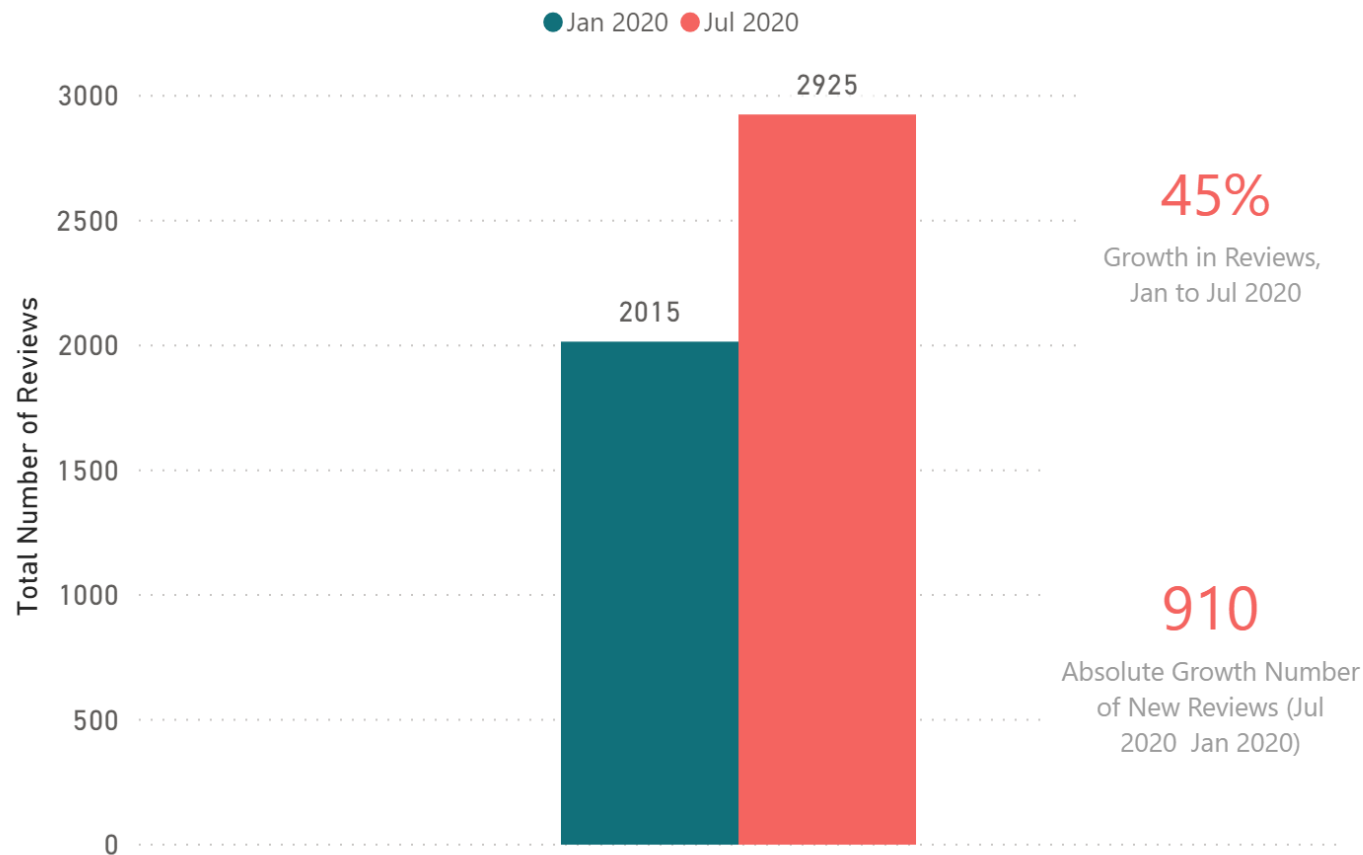
The Indonesian consumer typically rates probiotic supplements highly in the online space. Lumina has recorded a high average star rating, valued at **4.91** stars out of 5 in July 2020.

Probiotic Supplements, Average Star Rating 2017 to 2020



CAGR- compound annual growth rate

PROBIOTIC SUPPLEMENTS, REVIEWS, JANUARY 2020 to JULY 2020



PROBIOTIC SUPPLEMENTS  
BY TARGET POPULATION (1)

The most prevalent on the market are probiotics targeted towards Adults (51 products captured).

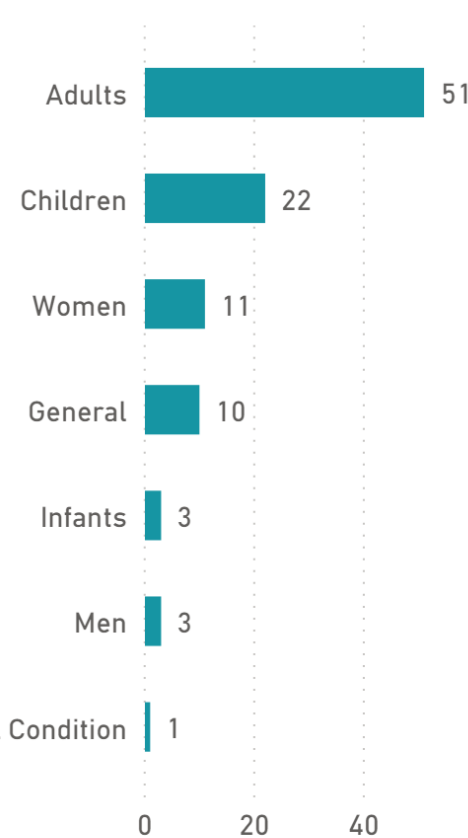
The most reviewed are these for Adults target population (1K reviews).

The fastest growing in the 1st half of 2020 are products for Men, with reviews up by 100%.

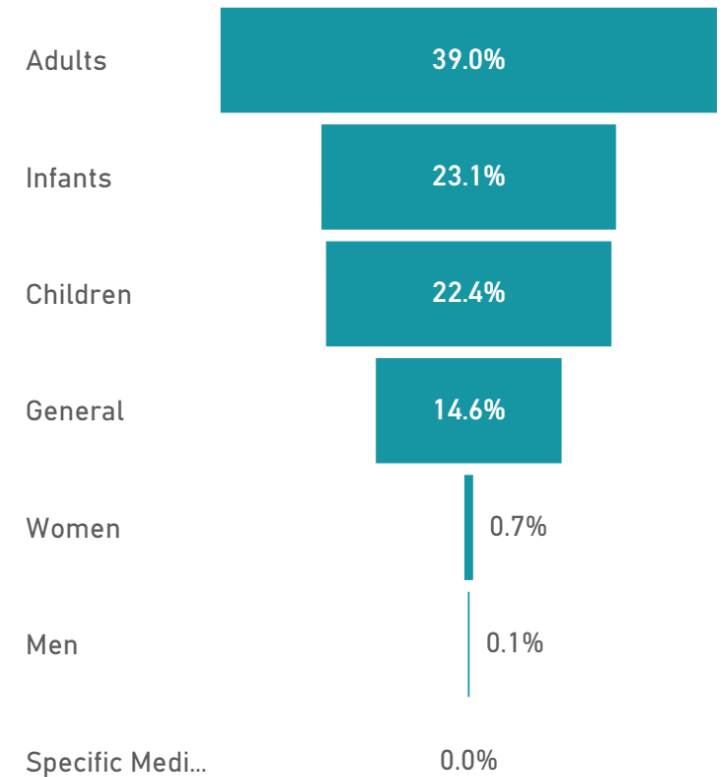
Probiotic Supplements by Target Population, 2020

Target population	% Growth (Jan to Jul 2020)	Number of Reviews (Jul 2020)
Adults	51%	1141
Infants	66%	677
Children	34%	656
General	23%	427
Women	43%	20
Men	100%	4
Specific Medical Condition		0
<b>Total</b>	<b>45%</b>	<b>2925</b>

Number of Products Captured by Target Population, July 2020



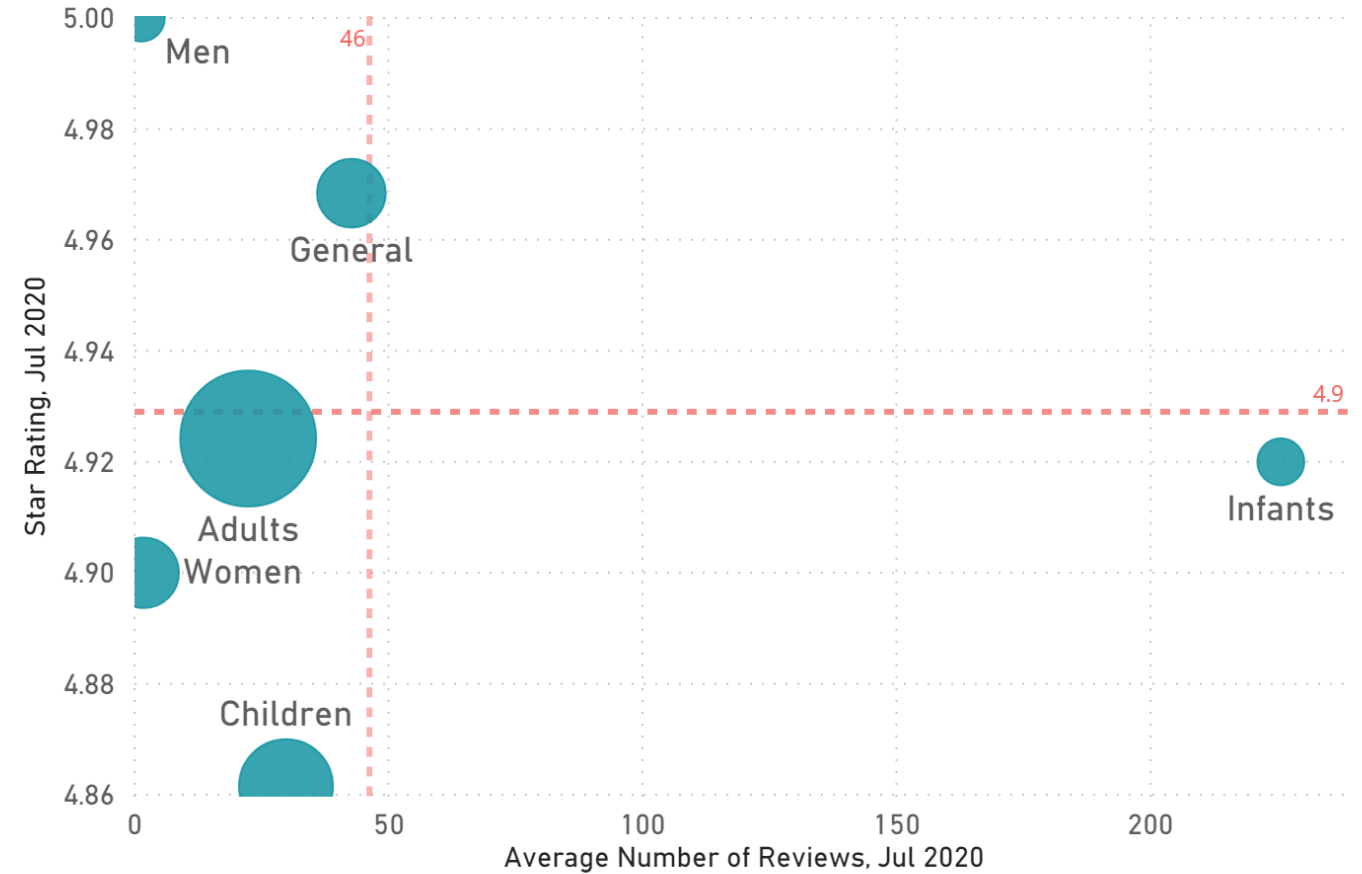
% Reviews by Target Population, July 2020



Analyzing consumer satisfaction with probiotic supplements by target population:

- the highest rated are probiotics for Men with **5.00** stars out of 5,
- the lowest rated are probiotics for Children with **4.86** stars out of 5.
- on average, the most reviewed products are those for Infants,
- no local products have been captured.

Online Engagement with Probiotics by Target population



Note: The red dotted lines show the average star rating and average number of reviews.

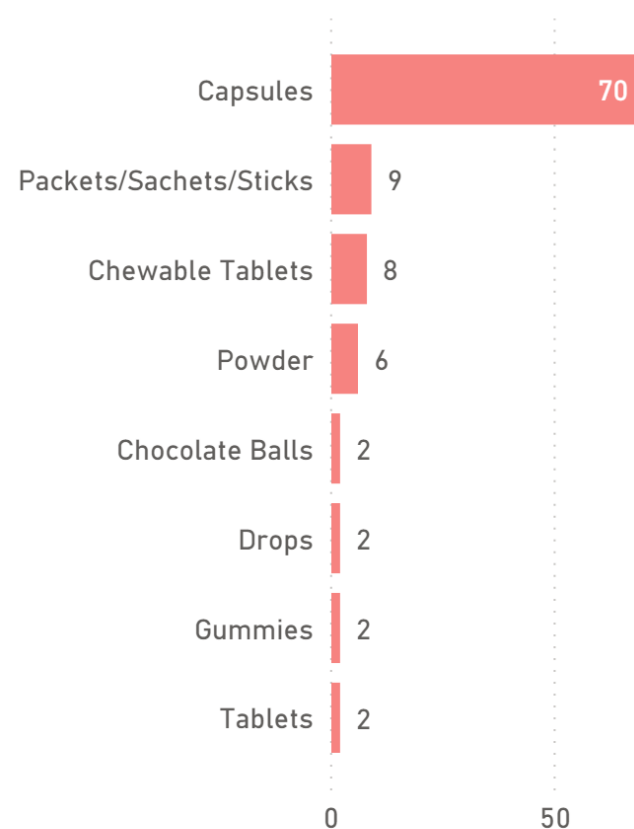
The most popular format for probiotics is Capsules present in **70** products, with **1K** customer reviews in July 2020.

The fastest growing in the 1st half of 2020 is Drops with reviews up by **86%**.

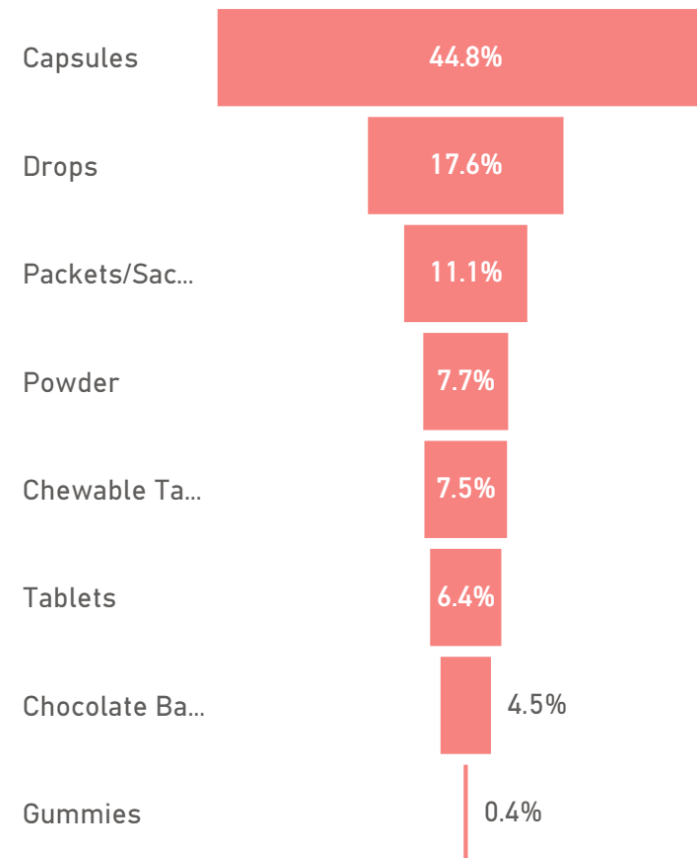
Probiotic Supplements by Format, 2020

Format	% Growth (Jan to Jul 2020)	Number of Reviews (Jul 2020)
Gummies	-75%	11
Chocolate Balls	22%	133
Tablets	48%	188
Chewable Tablets	69%	218
Powder	29%	224
Packets/Sachets/Sticks	39%	325
Drops	86%	516
Capsules	42%	1310
<b>Total</b>	<b>45%</b>	<b>2925</b>

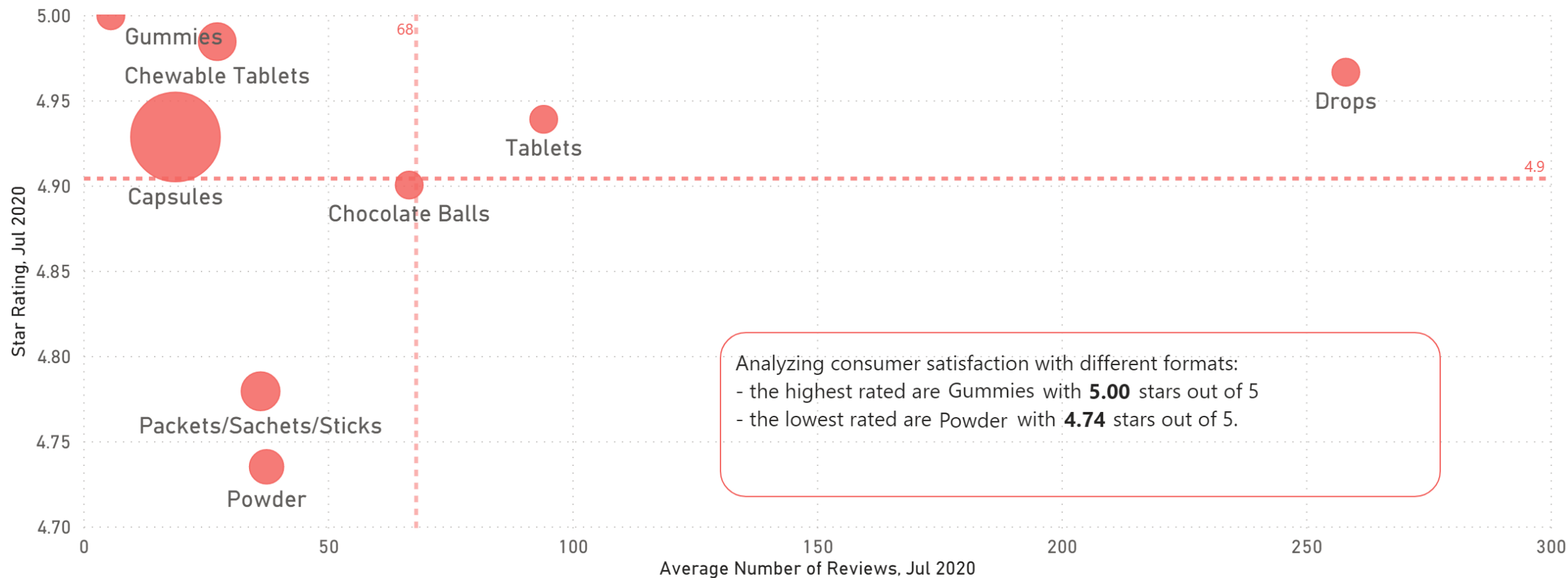
Number of Products (SKUs) by Format, July 2020



% Reviews by Format, July 2020



Online Engagement with Probiotic Supplements by Format

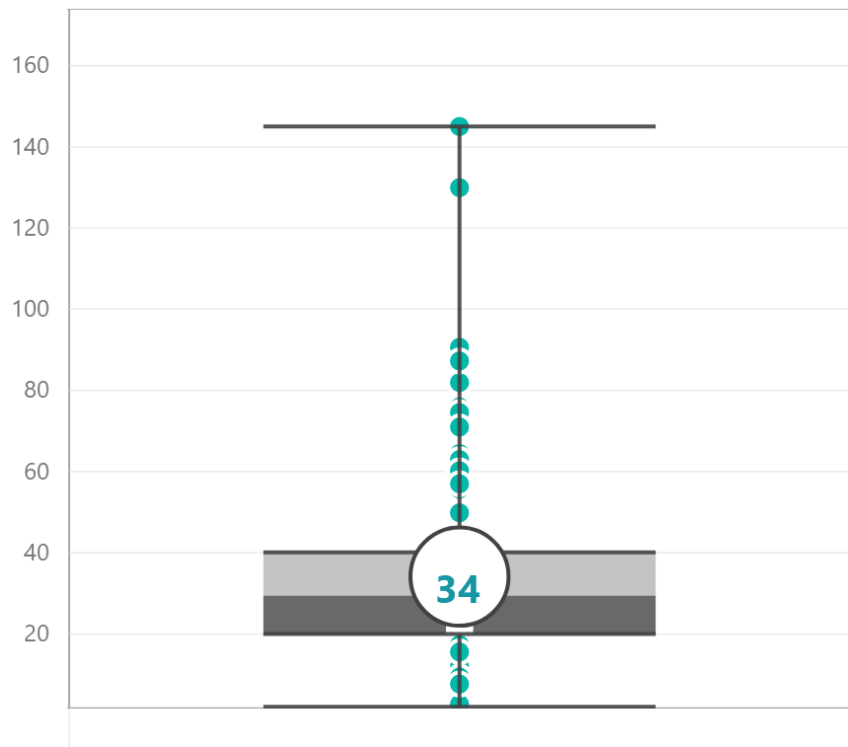


Analyzing consumer satisfaction with different formats:  
 - the highest rated are Gumies with **5.00** stars out of 5  
 - the lowest rated are Powder with **4.74** stars out of 5.

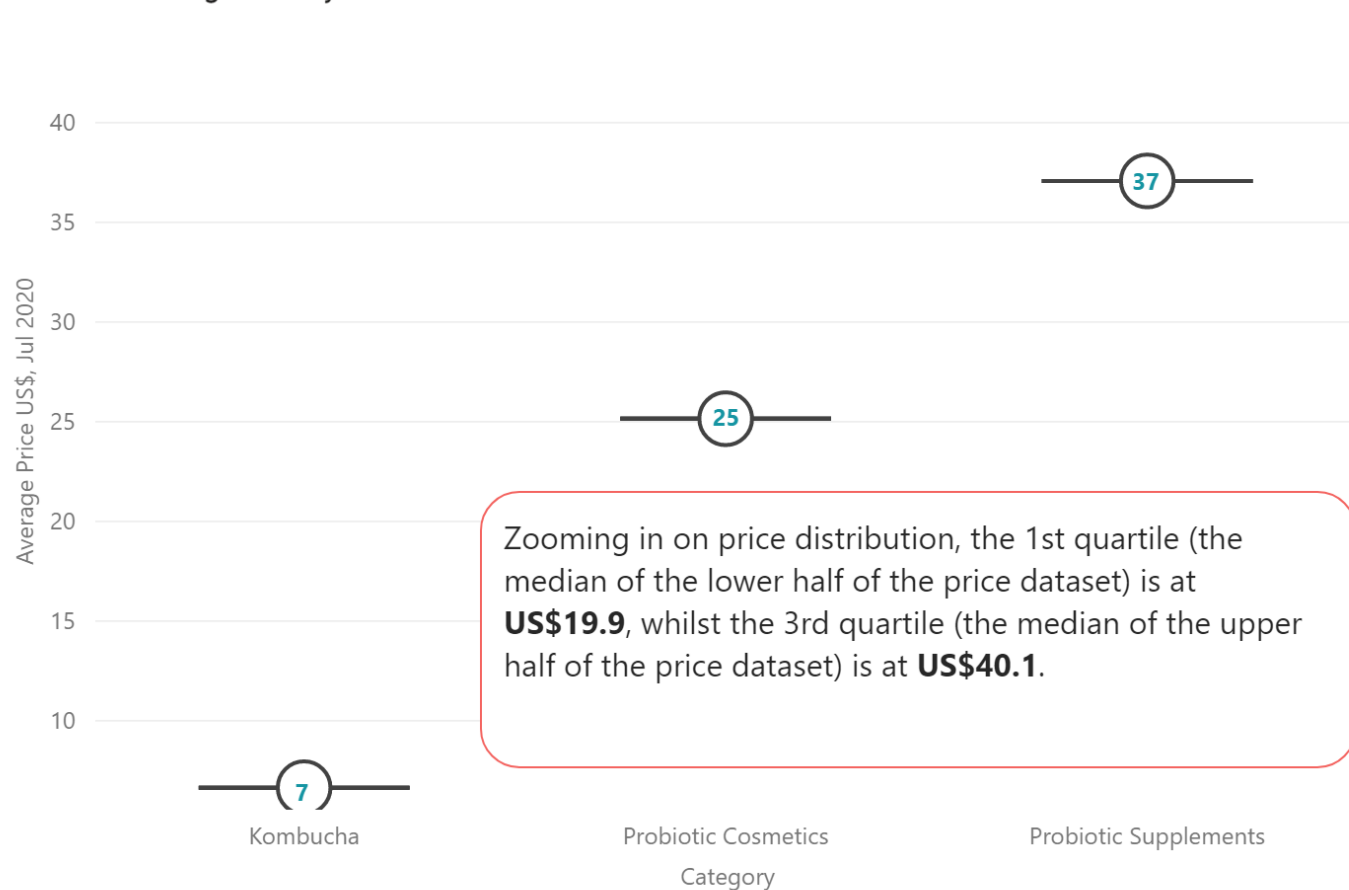
Note: The red dotted lines show the average star rating and average number of reviews.

The average price of probiotics in Indonesia is US\$ **34** per pack, although the range is dispersed from US\$ **2.1** to US\$ **145**.

Probiotics, Price per Pack Distribution, US\$

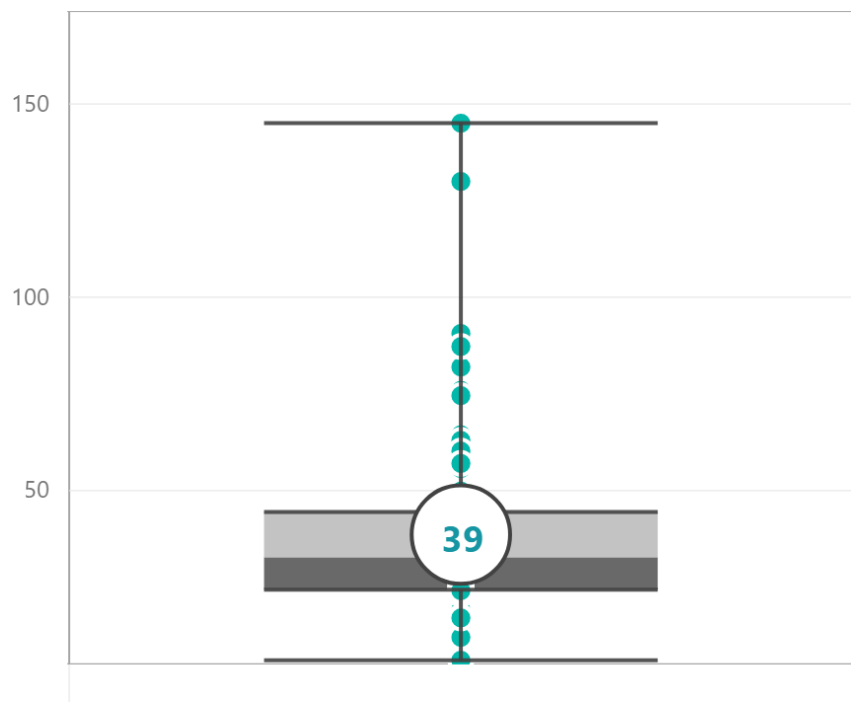


Probiotic Categories by Price, 2020



The average price of a probiotic supplement in Indonesia is US\$ **37** per pack, although the range is disperse from US\$ **2** to US\$ **145** for GNC Probiotic Solutions Women's 30 billion CFUs . Share of local products is negligible.

Probiotic Supplements, Price Distribution, US\$



Probiotic Supplements by Price and Star Rating, 2020





Delivery systems are stated on pack of **45** products.

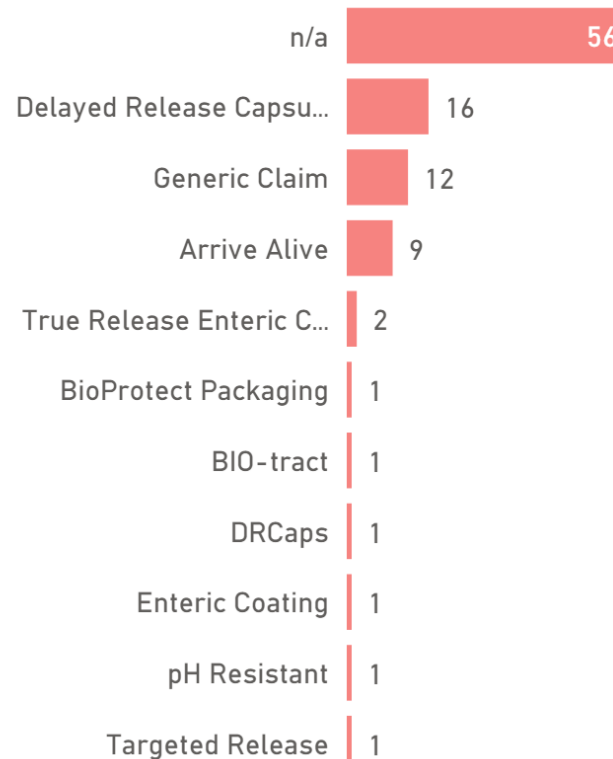
The most reviewed delivery format in July 2020 is Delayed Release Capsules with **205** reviews.

The fastest growth of **200%** in the 1st half of 2020 came from products with BioProtect Packaging.

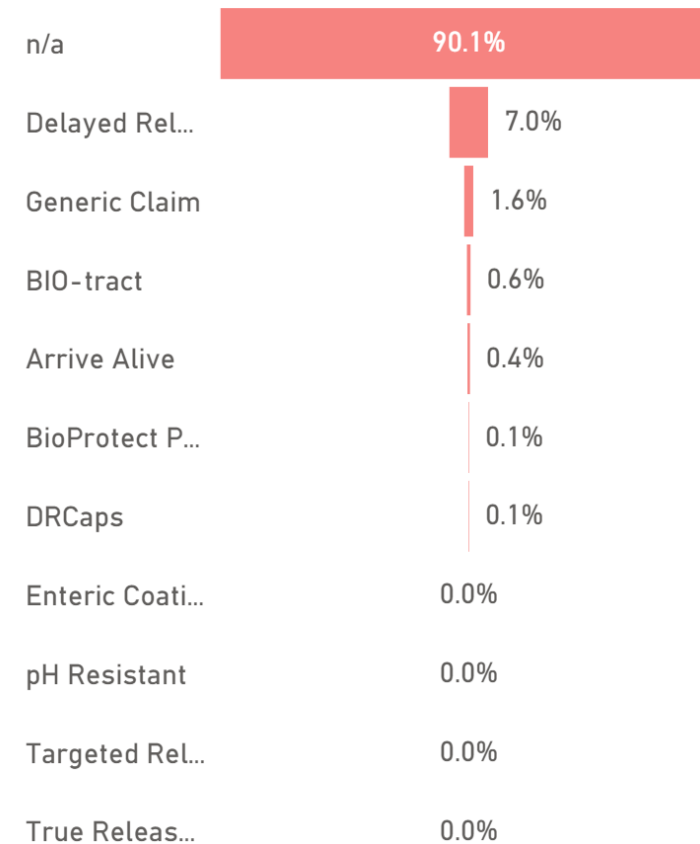
### Probiotic Supplements by Delivery System, 2020

Delivery system	% Growth (Jan to Jul 2020)	Number of Reviews (Jul 2020)
n/a	42%	2634
Delayed Release Capsules	95%	205
Generic Claim	85%	48
BIO-tract	36%	19
Arrive Alive	63%	13
BioProtect Packaging	200%	3
DRCaps	0%	3
Enteric Coating		0
pH Resistant	-100%	0
Targeted Release		0
True Release		0
<b>Total</b>	<b>45%</b>	<b>2925</b>

### Number of Products (SKUs) by Delivery System, July 2020



### % Reviews by Delivery System, July 2020



## PROBIOTIC SUPPLEMENTS IN E-COMMERCE

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## PROBIOTIC SUPPLEMENTS BY HEALTH BENEFIT (1)

### FOCUSING ON JULY 2020

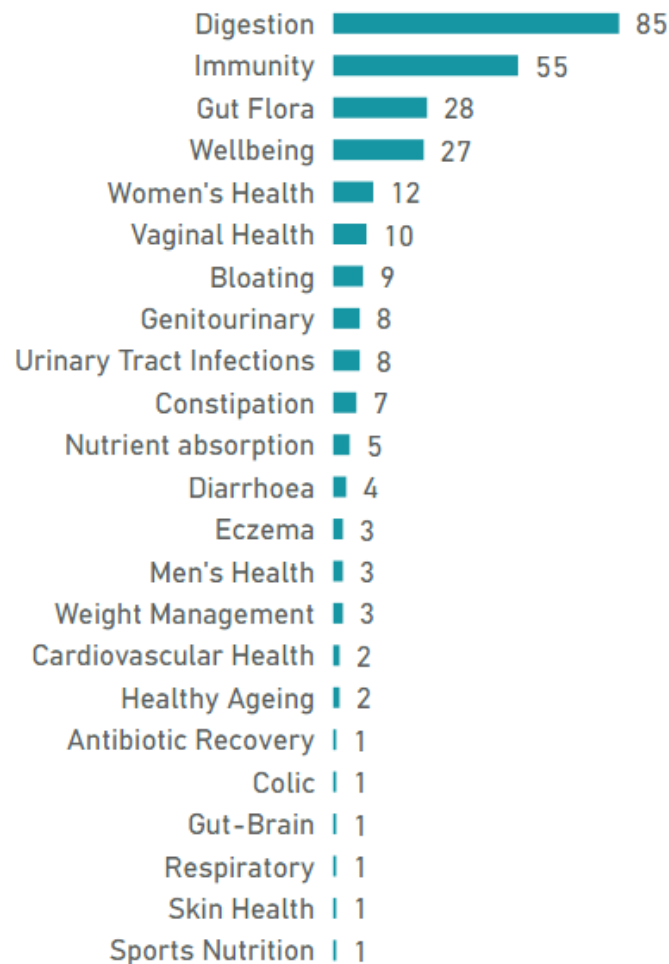
The most prevalent health benefits of probiotic supplements is Digestion claimed by **85** products.

Probiotics positioned to support digestion received **1930** reviews in total as of July 2020.

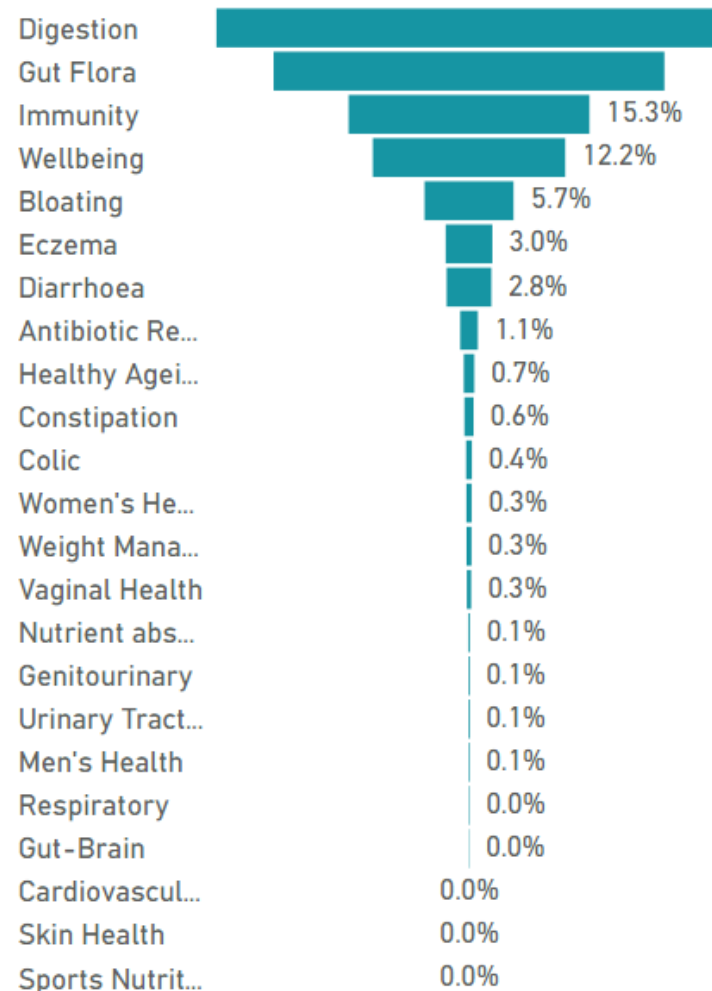
Immunity is ranked number **3** by number of reviews.  
**55** probiotics for immunity recorded in total **920** reviews.

Gut flora is ranked number **2** with **2413** reviews, the benefit is on the labels of **28** products.

No of Products by Health Benefit, July 2020



% Reviews by Health Benefit, July 2020



## PROBIOTIC SUPPLEMENTS BY HEALTH BENEFIT ( 2 )

### ZOOMING IN ON 1st HALF of 2020

The fastest growth in customer engagement in the period of January 2020 to July 2020 was recorded by probiotics positioned to support Nutrient absorption. The number of reviews was up by **500%**.

The weakest interest, on the other hand, was recorded by probiotics for Respiratory (**-67%**).

Probiotic Supplements, Total Number of Reviews by Health Benefit, 2020

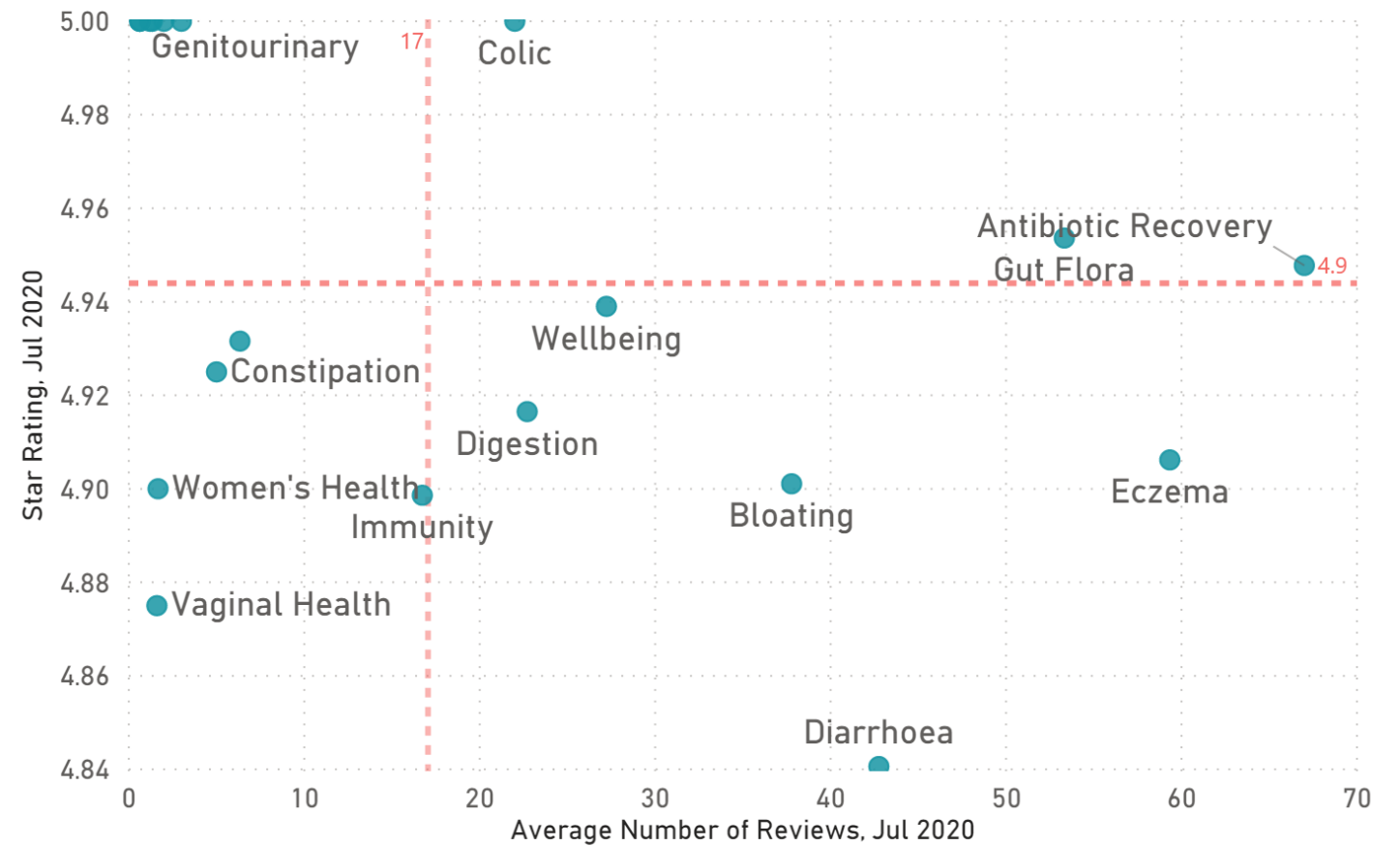
Health Benefit	% Growth (Jan to Jul 2020)	Number of Reviews (Jul 2020)
Antibiotic Recovery	60%	67
Bloating	50%	340
Cardiovascular Health		0
Colic	10%	22
Constipation	9%	35
Diarrhoea	51%	171
Digestion	39%	1930
Eczema	18%	178
Genitourinary	67%	5
Gut Flora	52%	1493
Gut-Brain	100%	2
Healthy Ageing		40
Immunity	63%	920
Men's Health	100%	4
Nutrient absorption	500%	6
Respiratory	-67%	3
Skin Health		0
Sports Nutrition		0
Urinary Tract Infections	67%	5
Vaginal Health	45%	16
Weight Management	36%	19
Wellbeing	59%	735
Women's Health	43%	20

ON AVERAGE IN JULY 2020

The largest average (per product) number of reviews ( **67** ) was recorded by probiotic supplements supporting Antibiotic Recovery. The corresponding star rating was **4.95** out of 5.

The smallest number of reviews ( **0** ) was recorded by an average probiotic supporting Cardiovascular Health .

Average (per product) Online Engagement with Probiotic Supplements by Health Benefit



Note: The red dotted lines show the average star rating and average number of reviews.

PRICE TO SATISFACTION, JULY 2020

With an average price of US\$ **61** per pack, the highest priced was an average probiotic for Gut-Brain. Consumer satisfaction expressed as the average star rating was **5.00** out of 5.

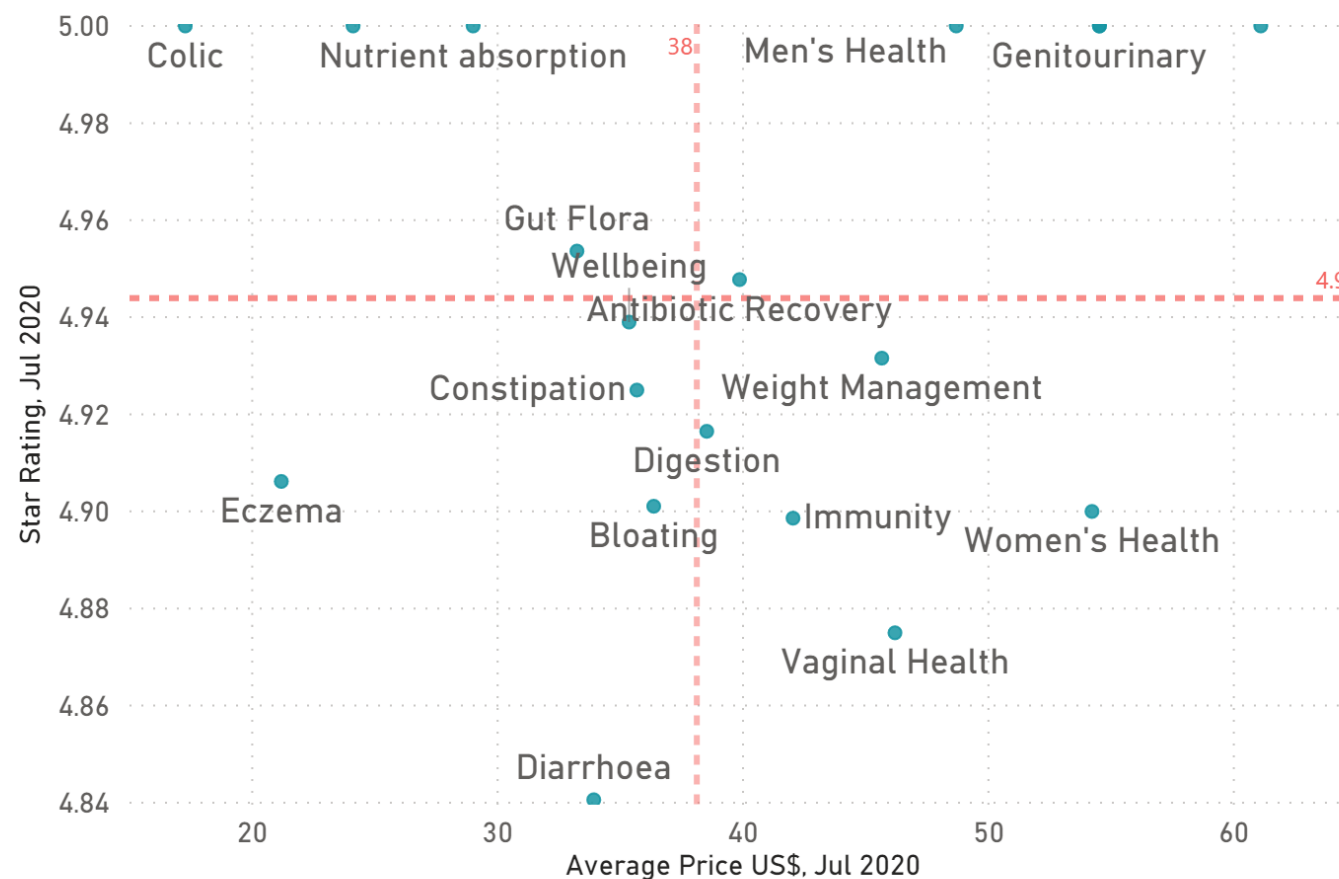
The lowest priced was an average probiotic for Colic, priced at US\$ **17**.

The next pages will zoom in on three key health benefits: digestion, immunity and women's health.

Lumina will analyse the e-commerce space by the number of reviews acquired by companies (brand owners and suppliers), brands and products.

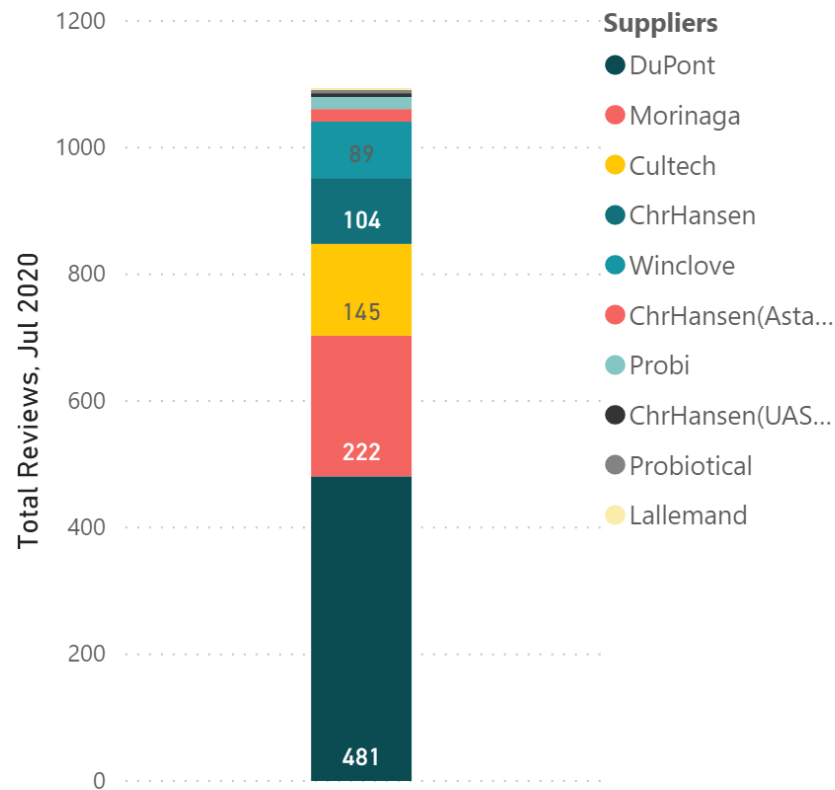
We'll also map out species and proprietary strains present in probiotic supplements that claim to support these health benefits. Note that some products may claim to support more than one health benefit, therefore whilst present in products, not all listed species and strains may exclusively support digestion, immunity and women's health.

Price to Satisfaction Ratio, Probiotic Supplements by Health Benefit

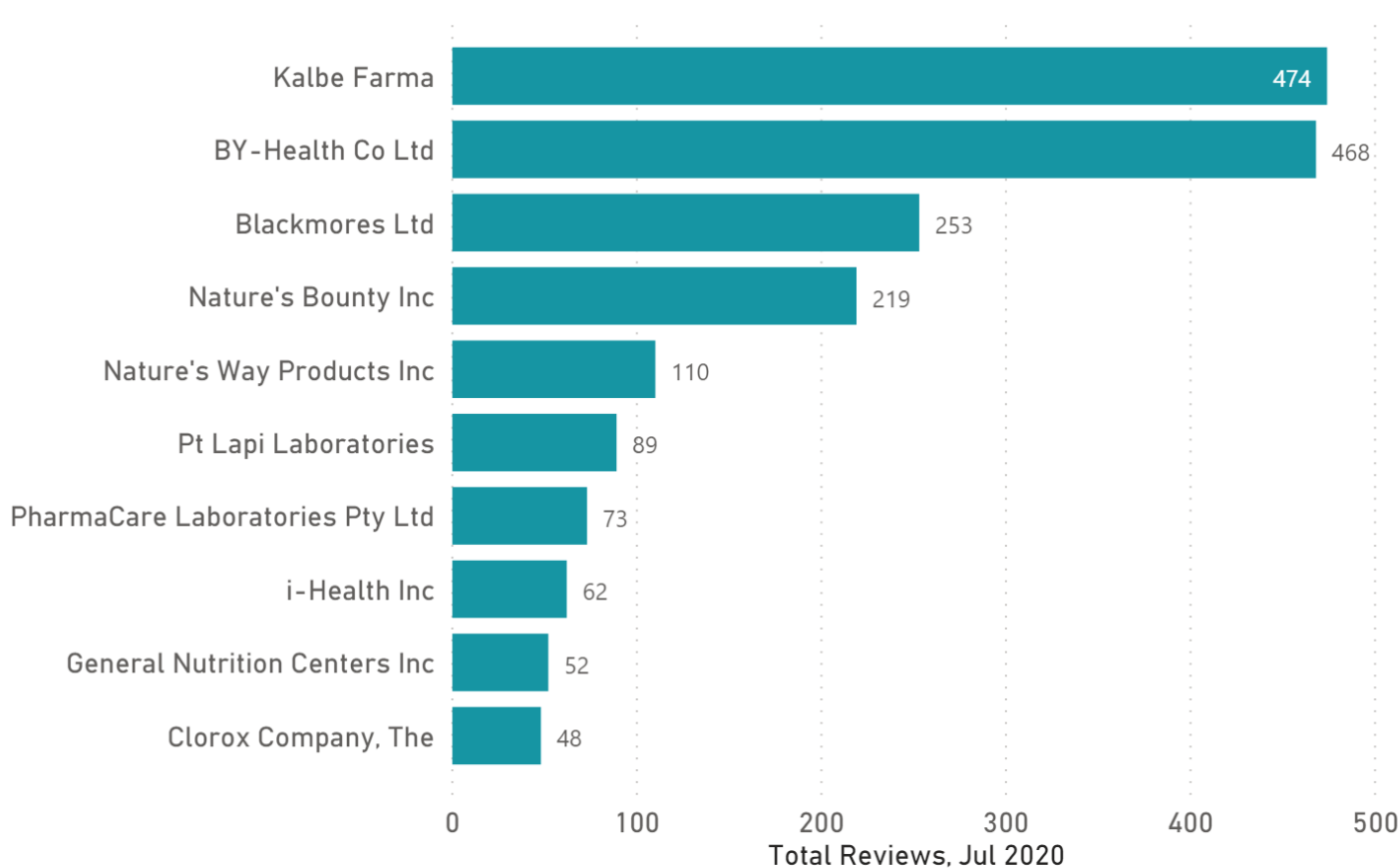


Note: The red dotted lines show the average star rating and average price.

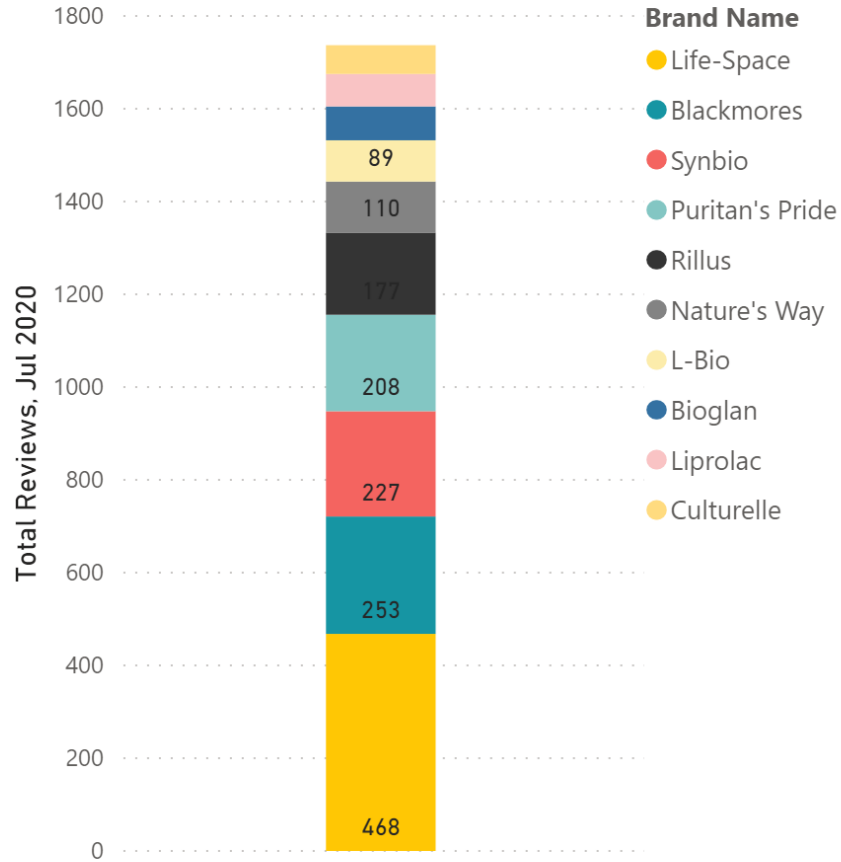
10 Most Reviewed Probiotic Suppliers based on Reviews of Products formulated with their Declared on Pack Proprietary Strains



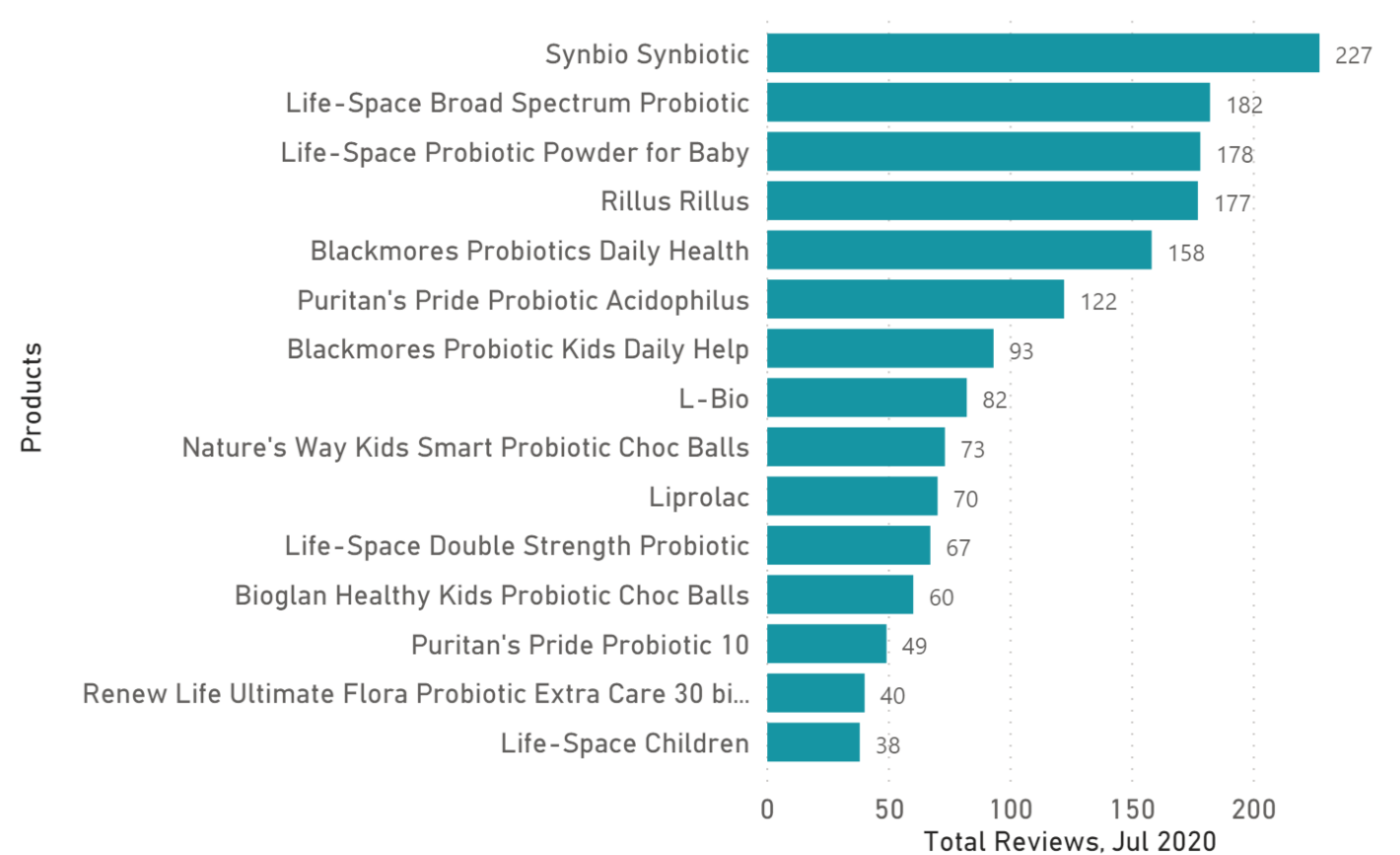
10 Most Reviewed Global Brand Owners



10 Most Reviewed Probiotic Brands



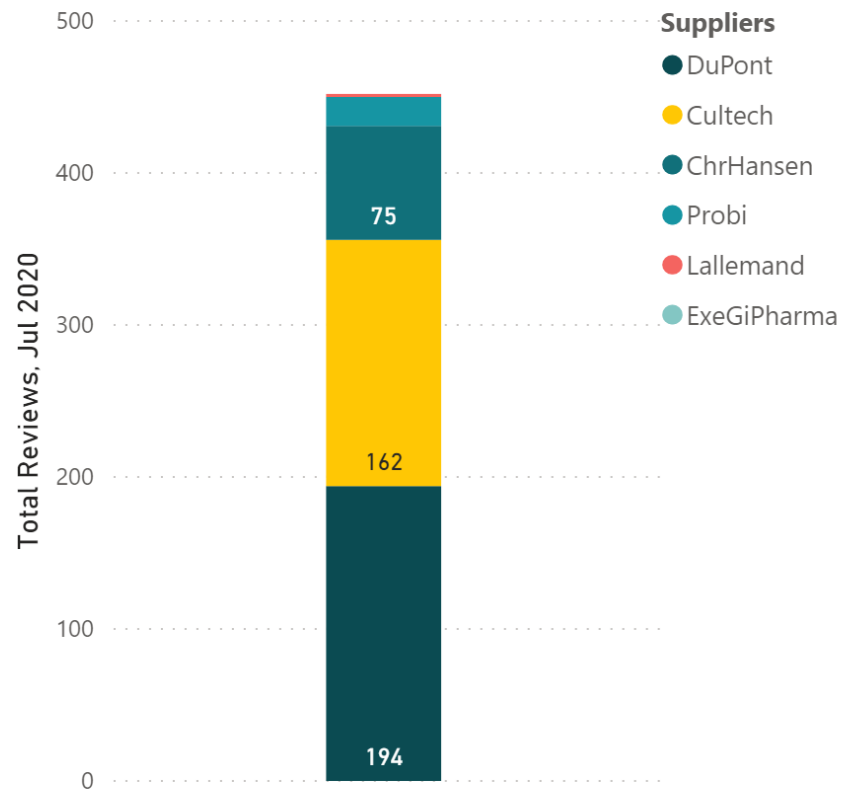
15 Most Reviewed Products



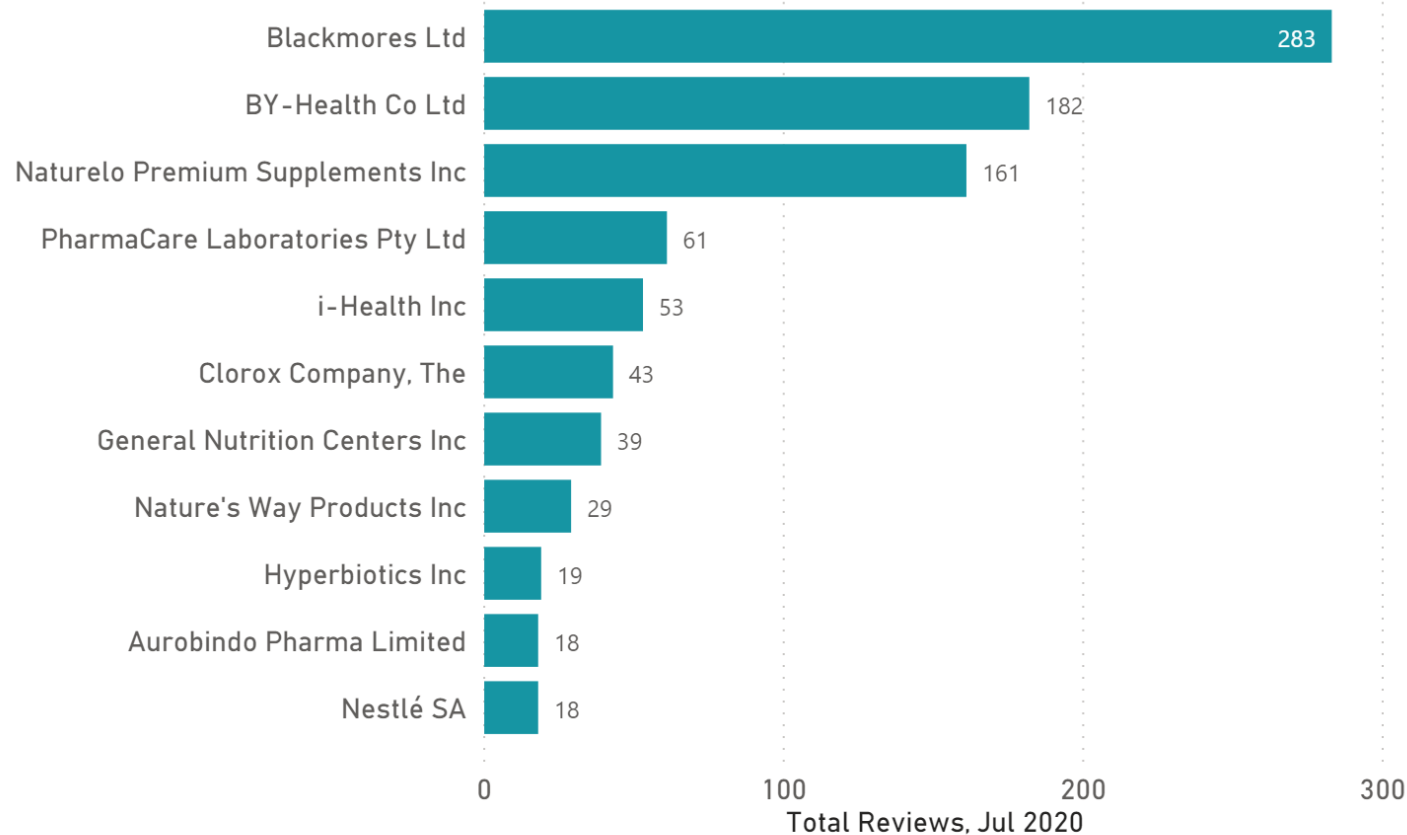




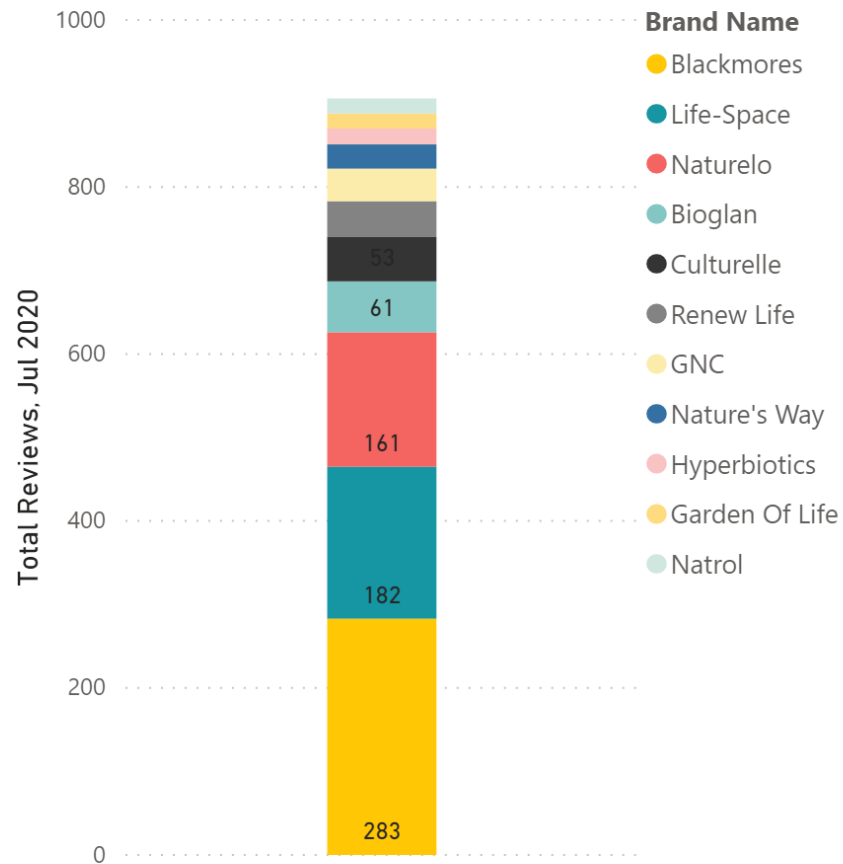
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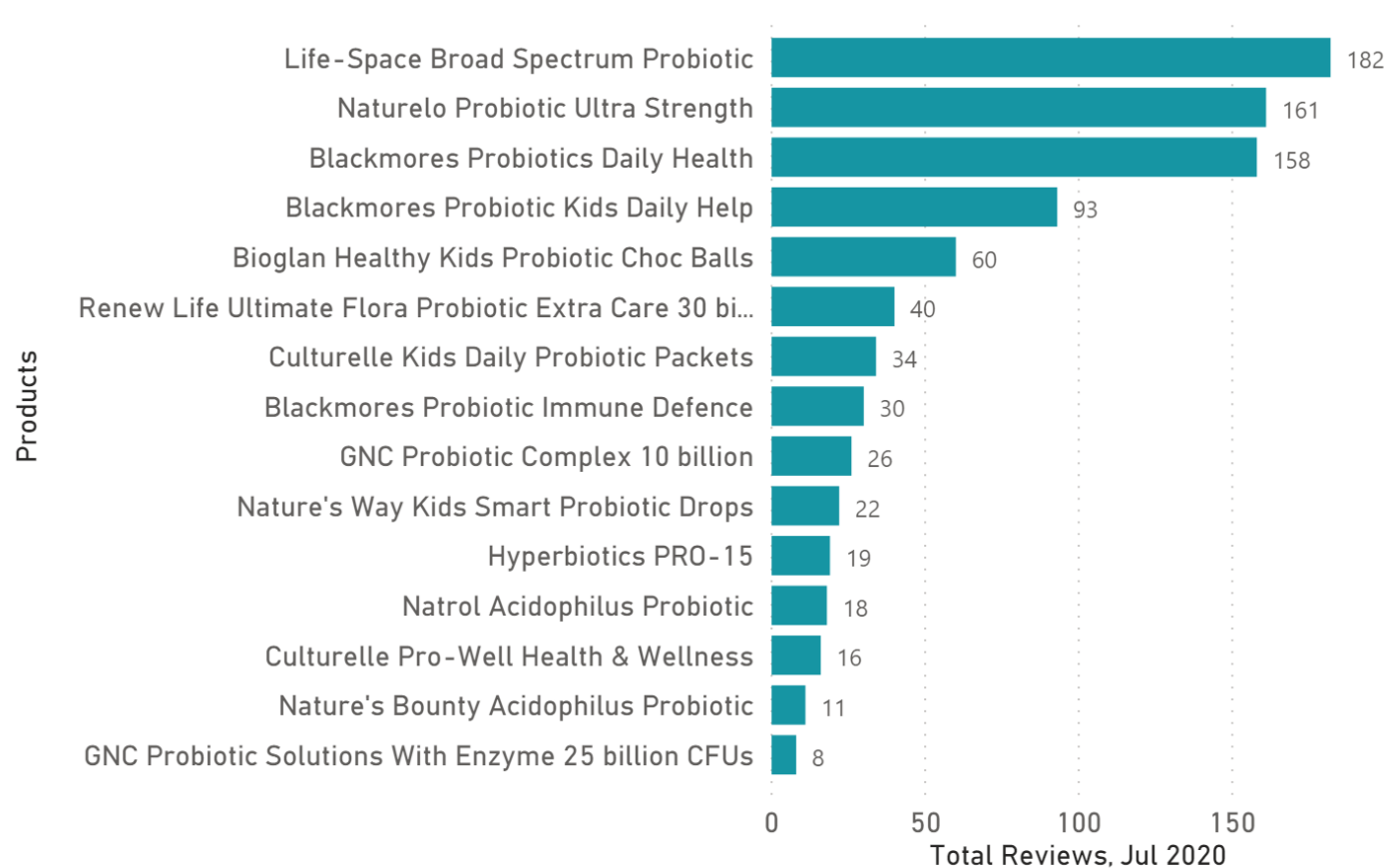
10 Most Reviewed Global Brand Owners



10 Most Reviewed Probiotic Brands



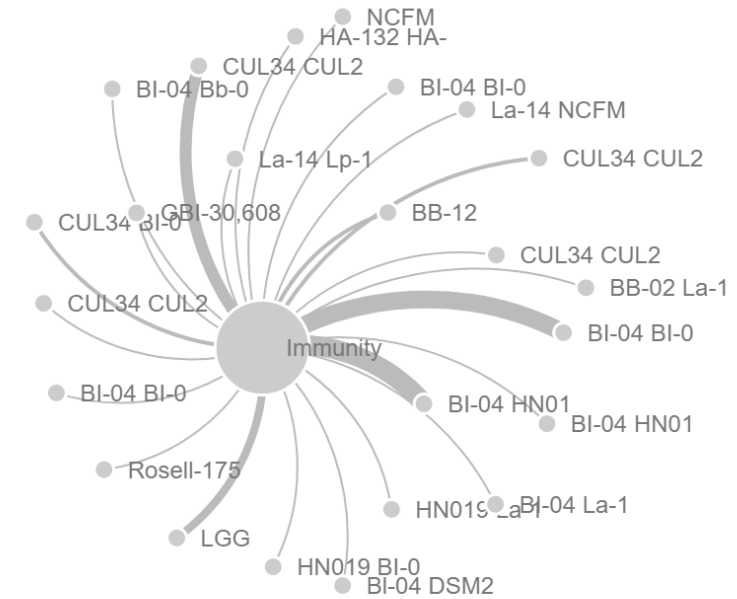
15 Most Reviewed Products



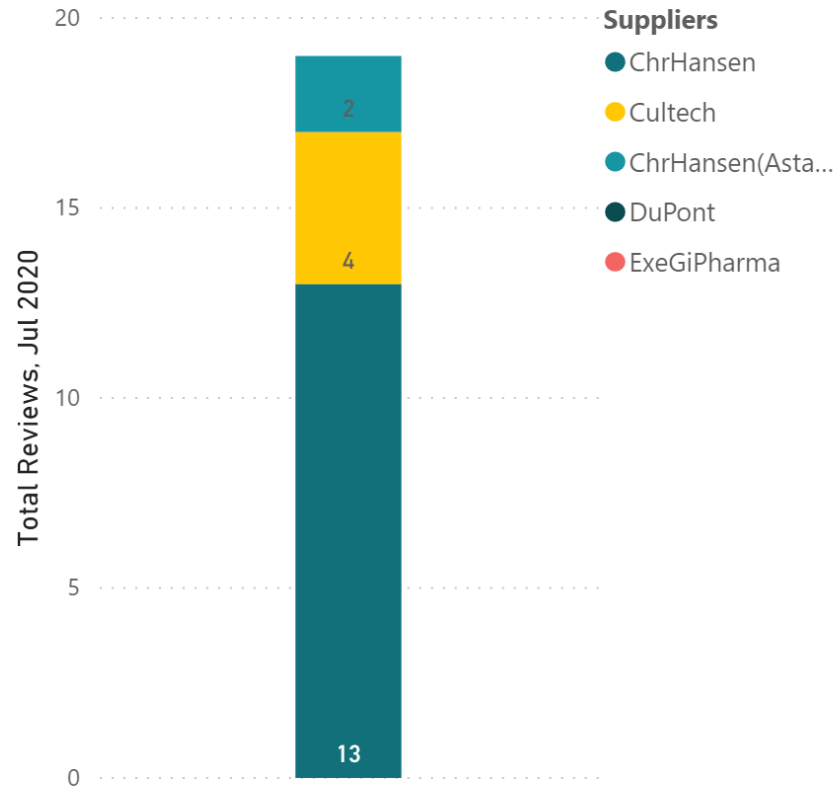
Probiotic Supplements Supporting Immunity and Species Present in Formulations by Number of Reviews (the larger the font, the more reviews), July 2020



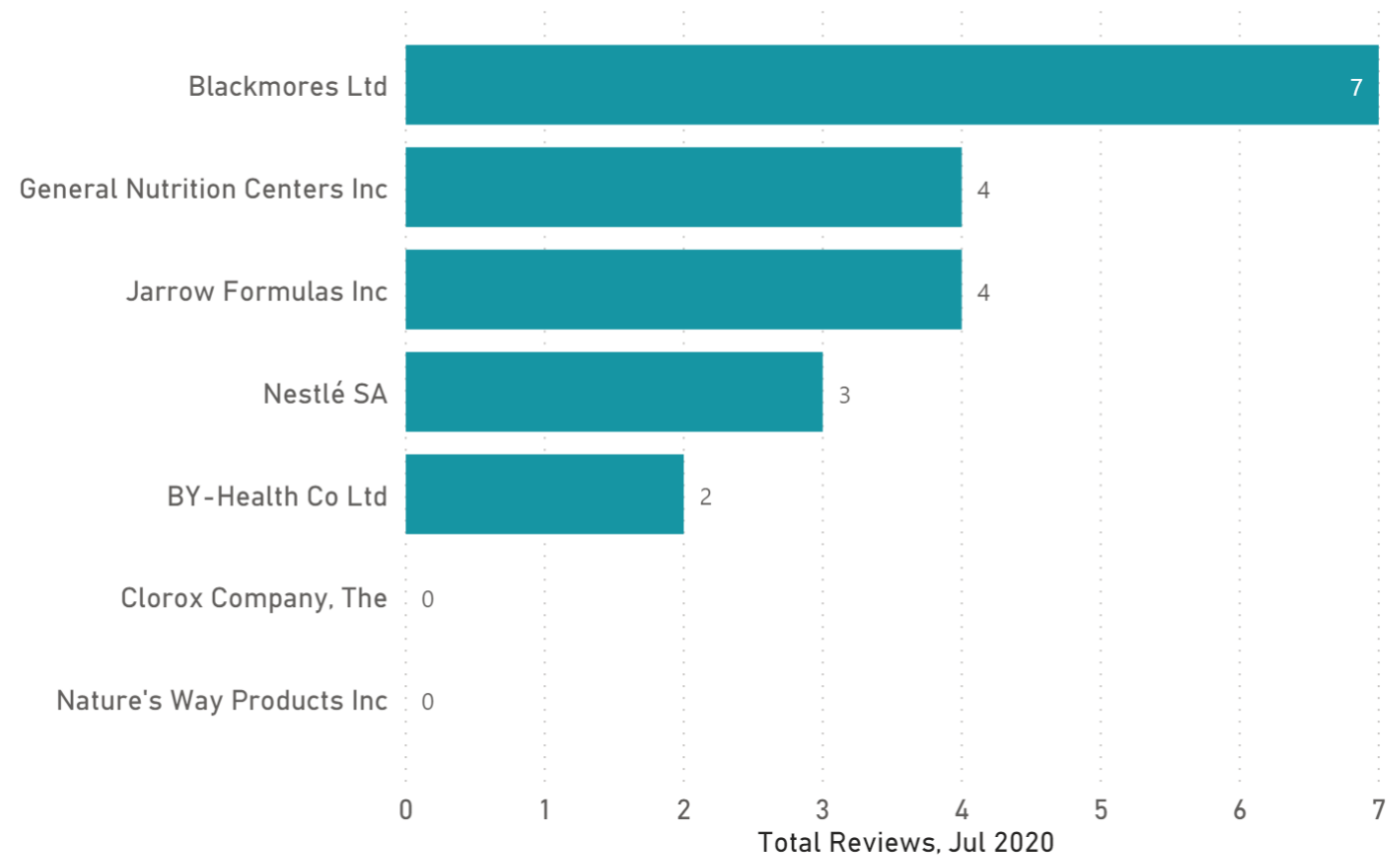
Probiotic Supplements, Health Benefit and Leading Proprietary Strains Present in Product Formulations by Number of Reviews (the bolder the node, the more reviews), July 2020



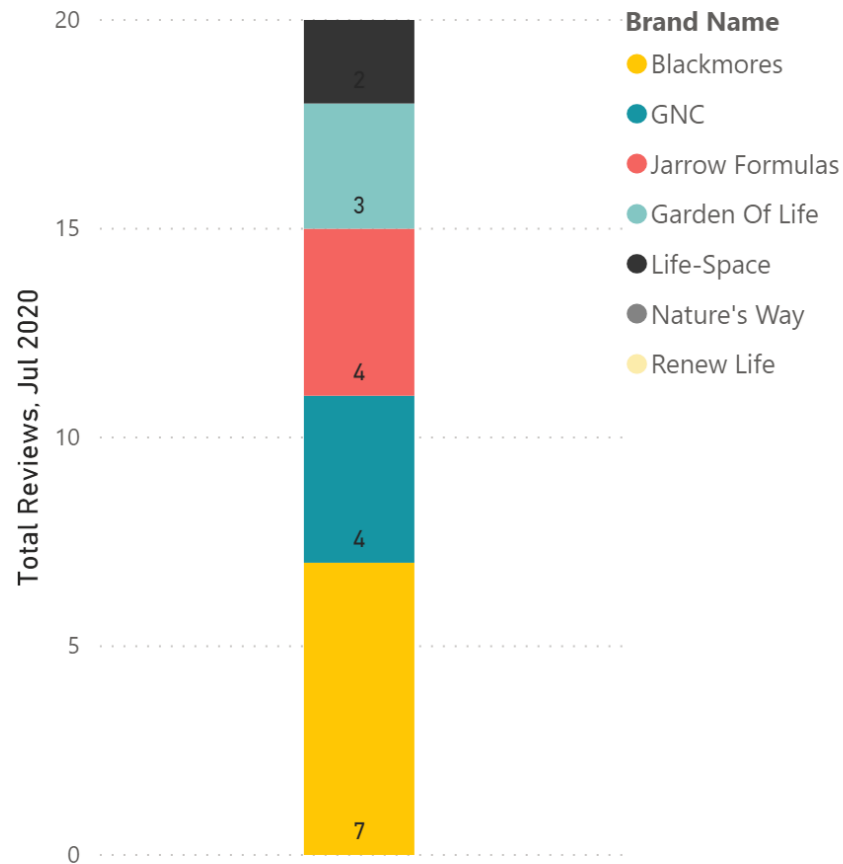
10 Most Reviewed Probiotic Suppliers based on Reviews of Products formulated with their Declared on Pack Proprietary Strains



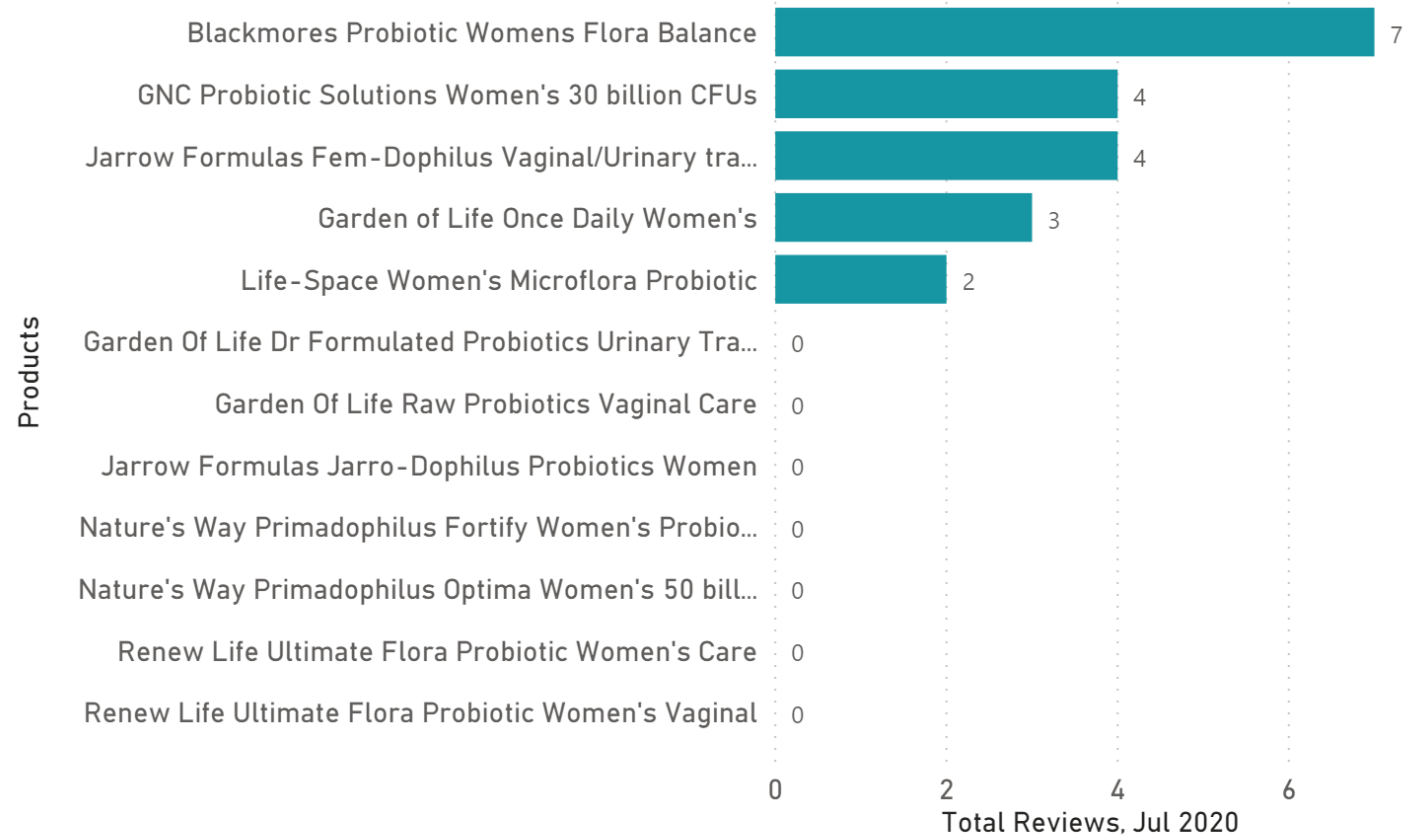
10 Most Reviewed Global Brand Owners



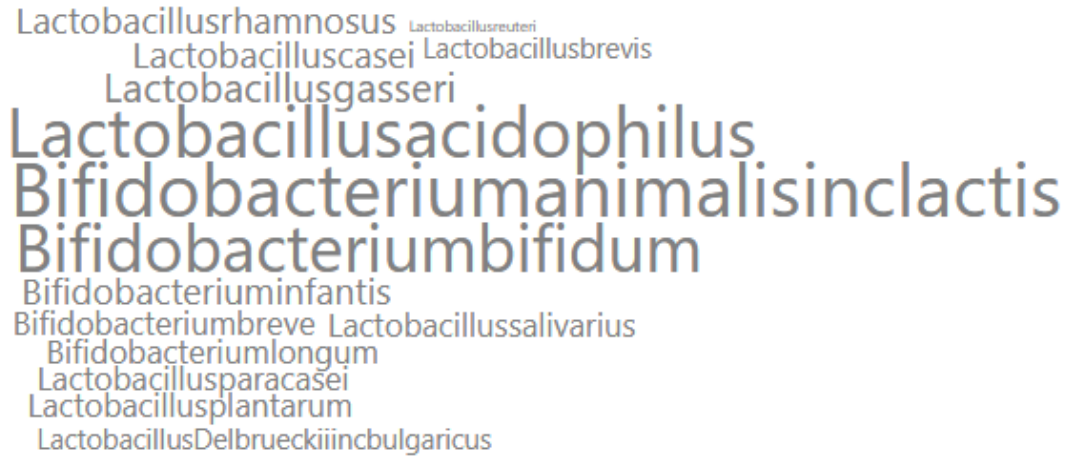
10 Most Reviewed Probiotic Brands



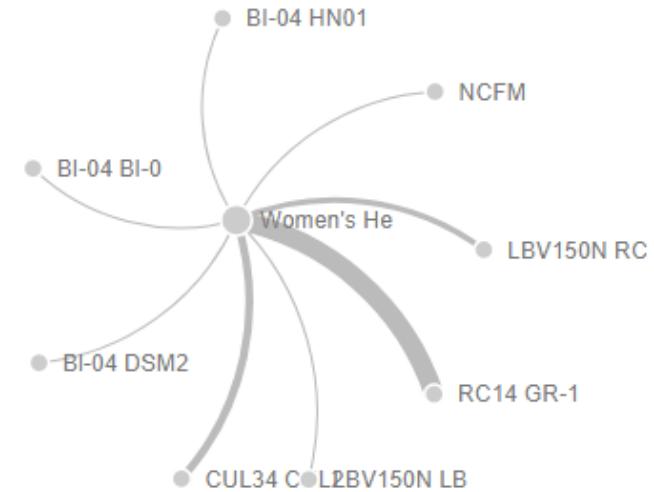
15 Most Reviewed Products



Probiotic Supplements Supporting Immunity and Species Present in Formulations by Number of Reviews (the larger the font, the more reviews), July 2020



Probiotic Supplements, Health Benefit and Leading Proprietary Strains Present in Product Formulations by Number of Reviews (the bolder the node, the more reviews), July 2020



## PROBIOTIC SUPPLEMENTS IN E-COMMERCE

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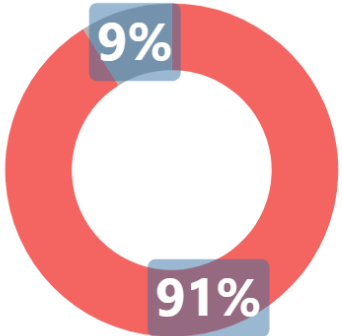
HEALTH CLAIM PRESENCE  
ON PROBIOTIC SUPPLEMENTS

The analysis of the label conducted in July 2020 shows that **91%** of probiotic supplements in Indonesia carry a health claim stated either on the packaging and/or on the manufacturer/retailer website.

Within that, **75%** of products have claims on pack versus **62%** on websites.

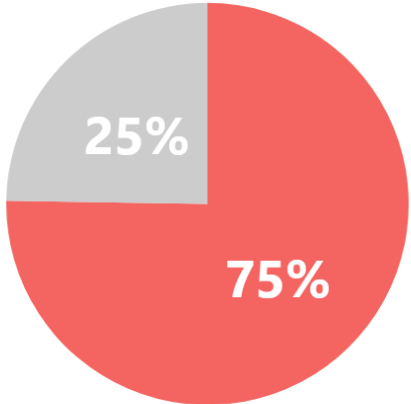
% of Products with Health Claim on Pack and/or Website, January 2020

● Present ● Not Present



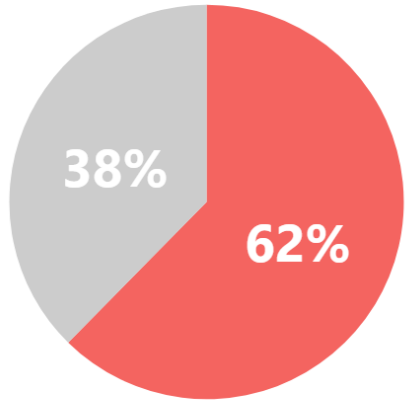
% of Products with Health Claim on Pack

● Present ● Not Present



% of Products with Health Claim on Website

● Present ● Not Present



Note: Health claims include European health claims and American structure - function claims. Nutrition claims are excluded.

INGREDIENT SOURCE OF HEALTH CLAIM 2020

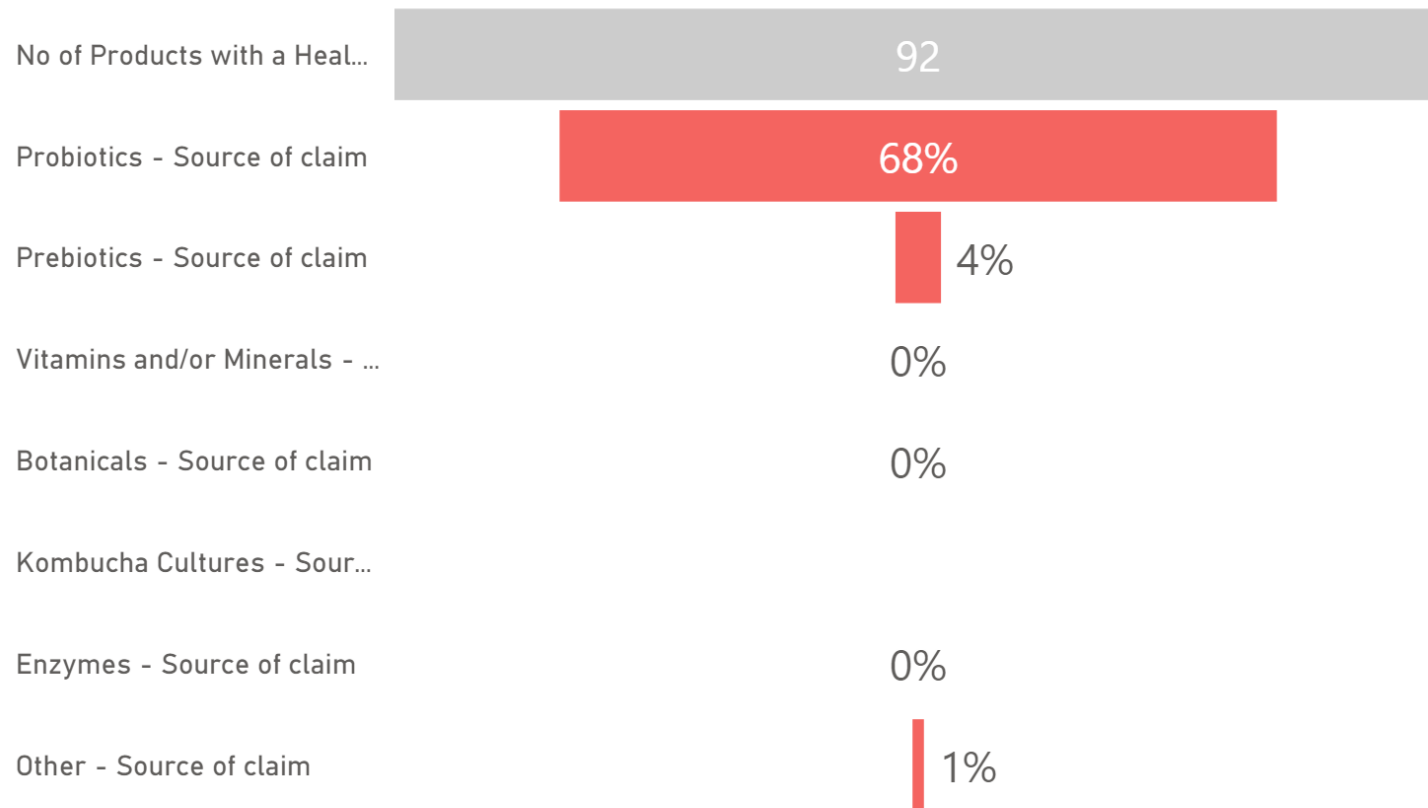
This page analyses which ingredients health claims are attributed to, if present on pack/website. Note that one product may have claims coming from more than one ingredient type.

The analysis of health claims present on **92** products flags that **68%** of claims made either on pack and/or website are attributed to probiotics.

Prebiotics came second with **4%** of claims.

The next two pages provide a list of claims made on pack and on websites for the most reviewed products.

Health Claims by Ingredient Type



15 Most Reviewed Probiotic Supplements with Health Claim on Pack, July 2020

Brand Variant	Number of Reviews (Jul 2020)	Health Claim on Pack
Life-Space Probiotic Powder for Baby	178	Supports a Healthy Microbiome, Everyday Wellbeing and Immune System Function, Encourages Good Bacterial Diversity
Naturelo Probiotic Ultra Strength	161	Helps Maintain Intestinal Comfort and Health; May Help with Occasional Gas, Bloating or Traveler's Diarrhea; Helps Support Immune System Function
Blackmores Probiotics Daily Health	158	Helps Restore Digestive Balance and Maintain Digestive and Intestinal Health.
Puritan's Pride Probiotic Acidophilus	122	Digestive System
Blackmores Probiotic Kids Daily Help	93	Support Kids Digestive and Immune System Health May Reduce the Frequency and Duration of Cold Symptoms
Life-Space Double Strength Probiotic	67	Supports a Healthy Microbiome and Helps Restore Beneficial Bacteria Following Antibiotic Therapy.
Bioglan Healthy Kids Probiotic Choc Balls	60	Healthy Tummies & Immunity
Puritan's Pride Probiotic 10	49	Helps Maintain Healthy Intestinal Balance
Renew Life Ultimate Flora Probiotic Extra Care 30 billion	40	Supports Digestive and Immune Health
Life-Space Children	38	Supporting a Healthy Microbiome. Supporting Digestive Health, Supporting a Healthy Immune System, Encouraging Good Bacterial Diversity, Supporting Normal, Healthy Bowel Movements
Puritan's Pride Probiotic Acidophilus with Pectin	37	Supports Intestinal Health
Culturelle Kids Daily Probiotic Packets	34	Helps Support Kids' Immune & Digestive Systems
Blackmores Probiotic Immune Defence	30	Supports Immune System Function and Helps Reduce the Severity and Duration of Colds
Now Probiotic-10 25 Billion	28	Healthy Intestinal Flora
GNC Probiotic Complex 10 billion	26	Digestive Support and Immune Health

Most Reviewed Probiotic Supplements with Health Claim on Website, July 2020

Brand Variant	Number of Reviews (Jul 2020)	Health Claim on Website
Puritan's Pride Probiotic Acidophilus	122	Supports Overall Wellbeing
Life-Space Probiotic Powder for Baby	178	Supporting a Healthy Microbiome, Supporting Digestive Health, Supporting a Healthy Immune System. Providing Lactobacillus Rhamnosus Hn001 Which May Help Reduce the Risk of Developing Eczema in Young Children with a Family History, When Taken During Pregnancy, Breastfeeding and in the First 2 Years of Life, Encouraging Good Bacterial Diversity
Life-Space Broad Spectrum Probiotic	182	Supporting a Healthy Microbiome Supporting Digestive Health. Supporting a Healthy Immune System. Maintaining Healthy Levels of Beneficial Bacteria. Supporting Normal, Healthy Bowel Movements. Assisting in Maintaining Healthy Digestive Flora Following the Use of Antibiotics.
Blackmores Probiotics Daily Health	158	Relieve Symptoms of Bloating, Gas and Flatulence, Support a Normal Healthy Immune System, Support General Wellbeing, Contains a Prebiotic Which Provide a Source of Nutrition for Gut Flora
Blackmores Probiotic Kids Daily Help	93	May Support the Body'S Natural Defences and Maintain Immune System Function May Reduce the Number of Days Absent from Preschool Due to Colds May Reduce the Frequency and Duration of Cold Symptoms Easily Dissolving Powder That Can Be Added to Food or Liquid, or Under Adult Supervision, Taken Directly
BioGaia Interlac Probiotic Drops	494	Helps Good Microorganism Restores a Natural Balance in the Gut
BioGaia Interlac Tabs	118	Helps Good Microorganism Restores a Natural Balance in the Gut
Synbio Synbiotic	227	Help to Maintain Healthy Digestive Function

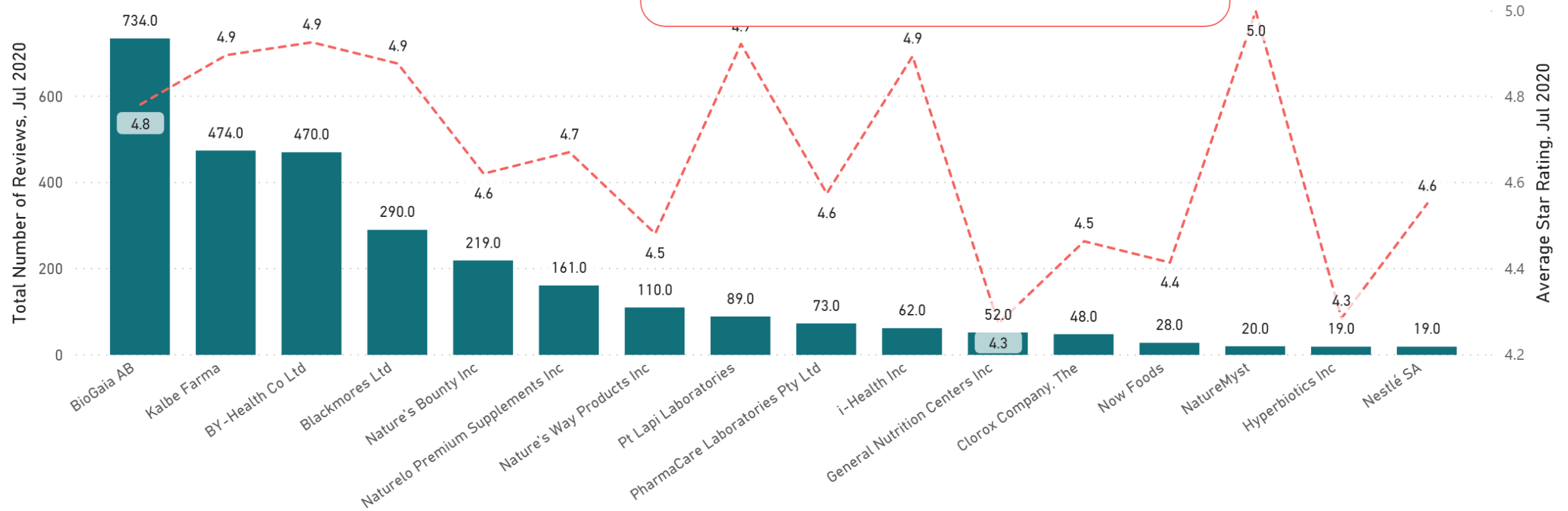
## PROBIOTIC SUPPLEMENTS IN E-COMMERCE

- COUNTRY OVERVIEW
- PRODUCT ANALYSIS BY
  - TARGET POPULATION
  - FORMAT
  - PRICE
  - DELIVERY SYSTEM
- HEALTH BENEFIT ANALYSIS WITH FOCUS ON
  - DIGESTION
  - IMMUNITY
  - WOMEN'S HEALTH
- HEALTH CLAIMS BY
  - ON PACK
  - ON WEBSITES
- **COMPETITIVE LANDSCAPE**
- SUPPLY CHAIN
- INGREDIENTS BY
  - SPECIES/STRAINS: GENERIC VERSUS PROPRIETARY
  - PREBIOTICS
  - DOSAGE
- METHODOLOGY



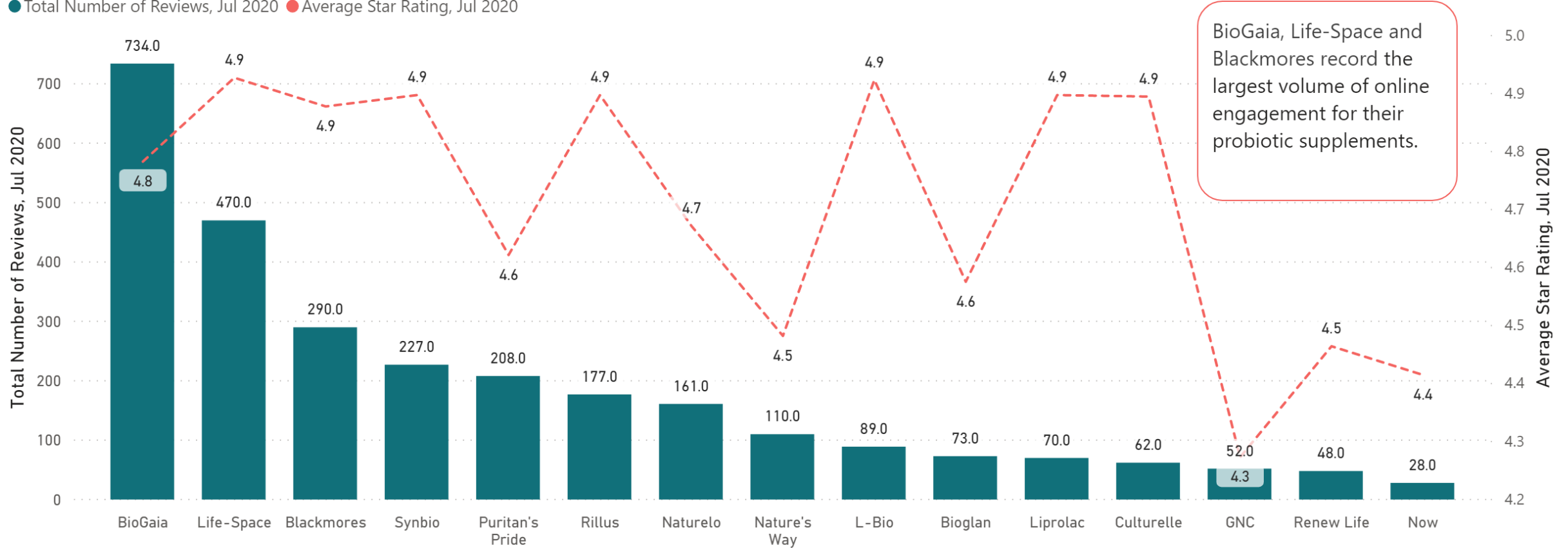
Top 15 Global Brand Owners by Reviews

● Total Number of Reviews, Jul 2020 ● Average Star Rating, Jul 2020



Top 15 Brands by Reviews

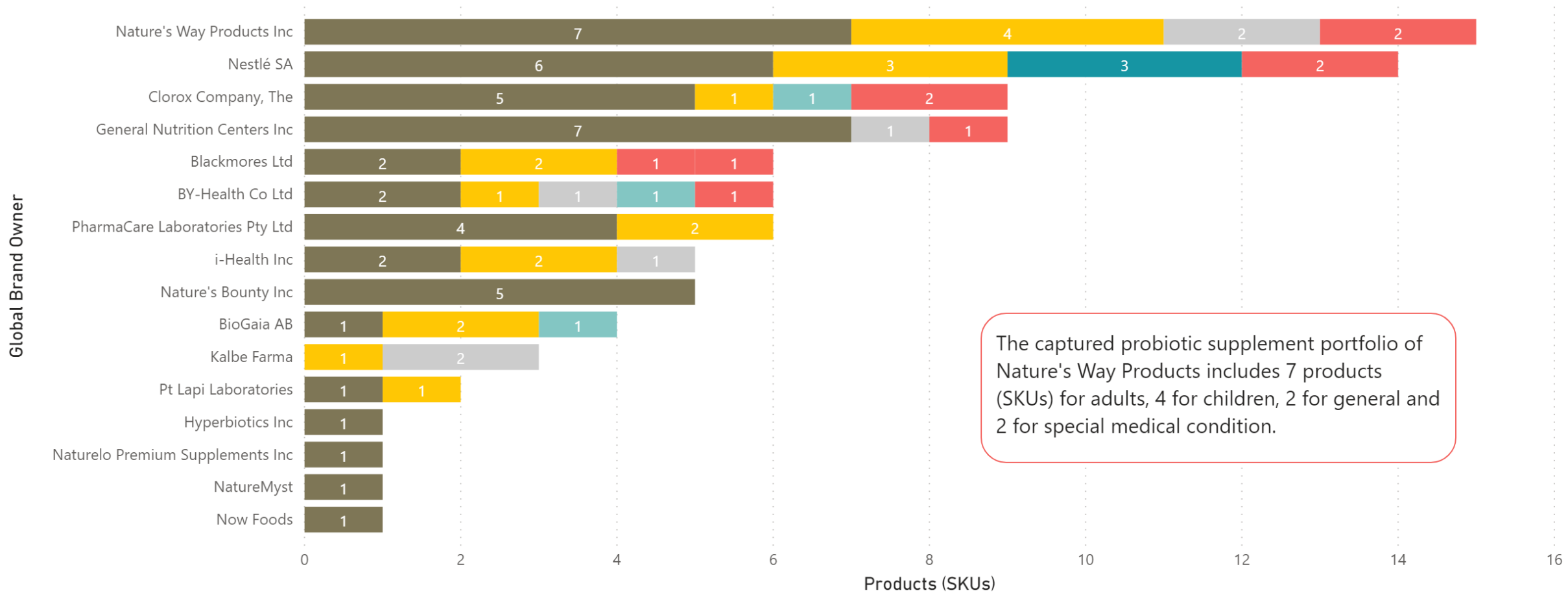
● Total Number of Reviews, Jul 2020 ● Average Star Rating, Jul 2020



BioGaia, Life-Space and Blackmores record the largest volume of online engagement for their probiotic supplements.

15 Most Reviewed Companies and Their Probiotic Supplements by Target Population

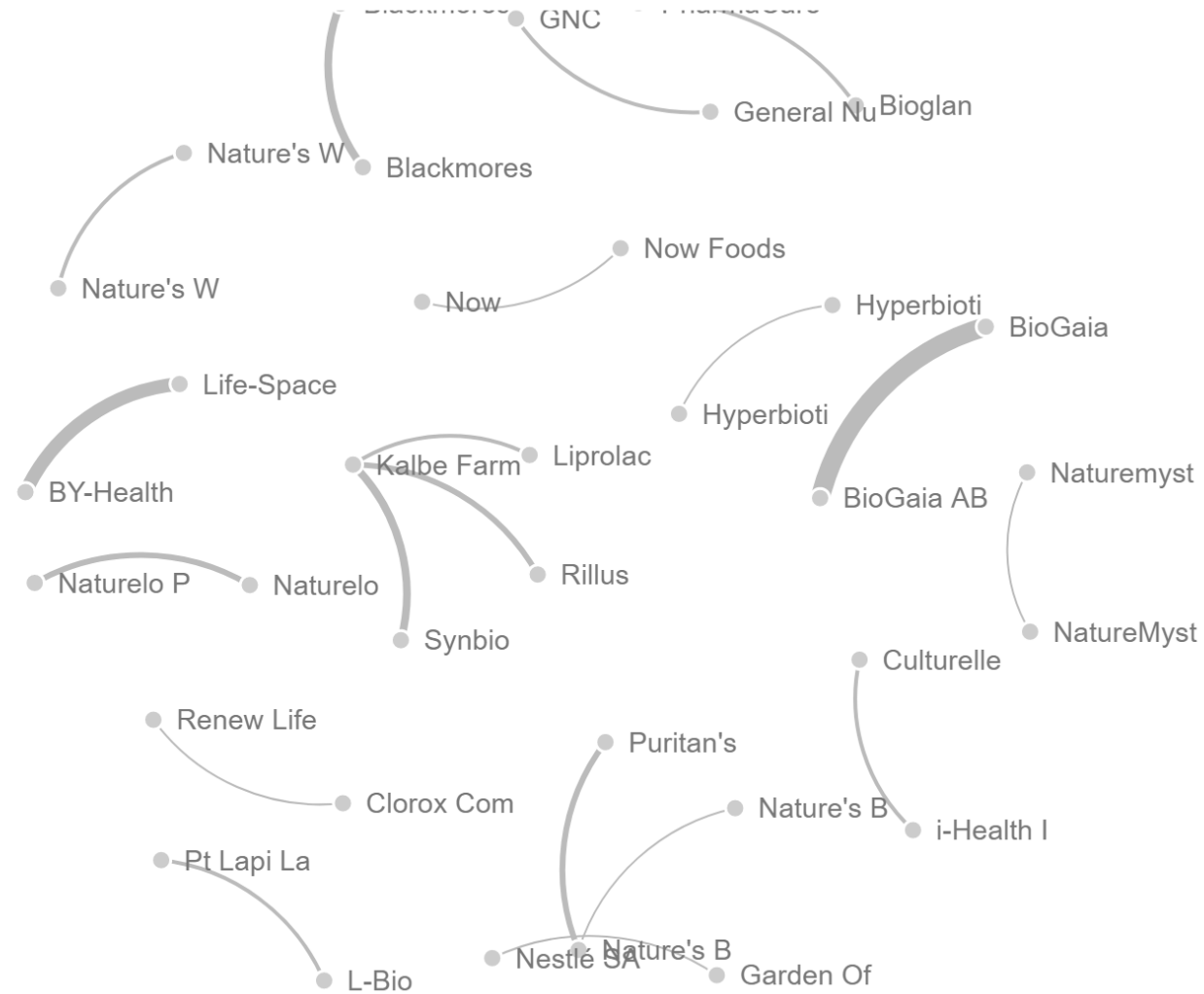
Target population ● Adults ● Children ● General ● Infants ● Men ● Specific Medical Condition ● Women



The captured probiotic supplement portfolio of Nature's Way Products includes 7 products (SKUs) for adults, 4 for children, 2 for general and 2 for special medical condition.

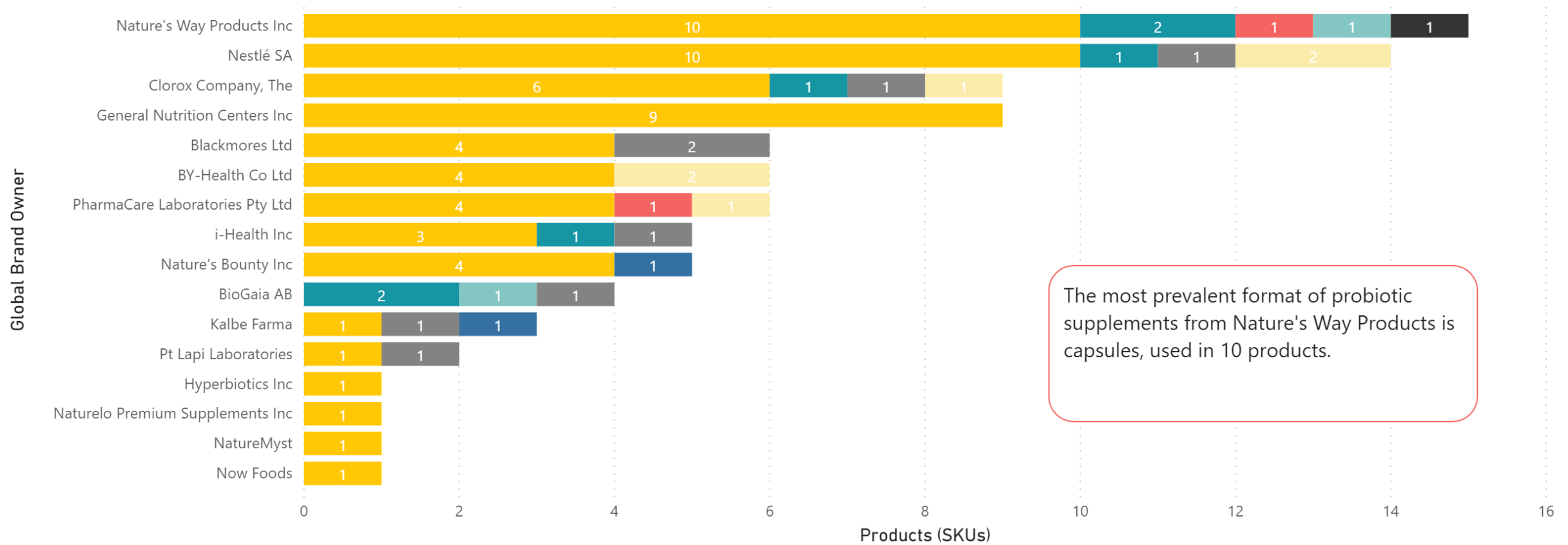


This visual maps out the online engagement across the competitive landscape, linking Global Brand Owners and their Brands by Number of Reviews as of July 2020. The bolder the node, the more reviews.



15 Most Reviewed Companies and Their Probiotic Supplements by Format

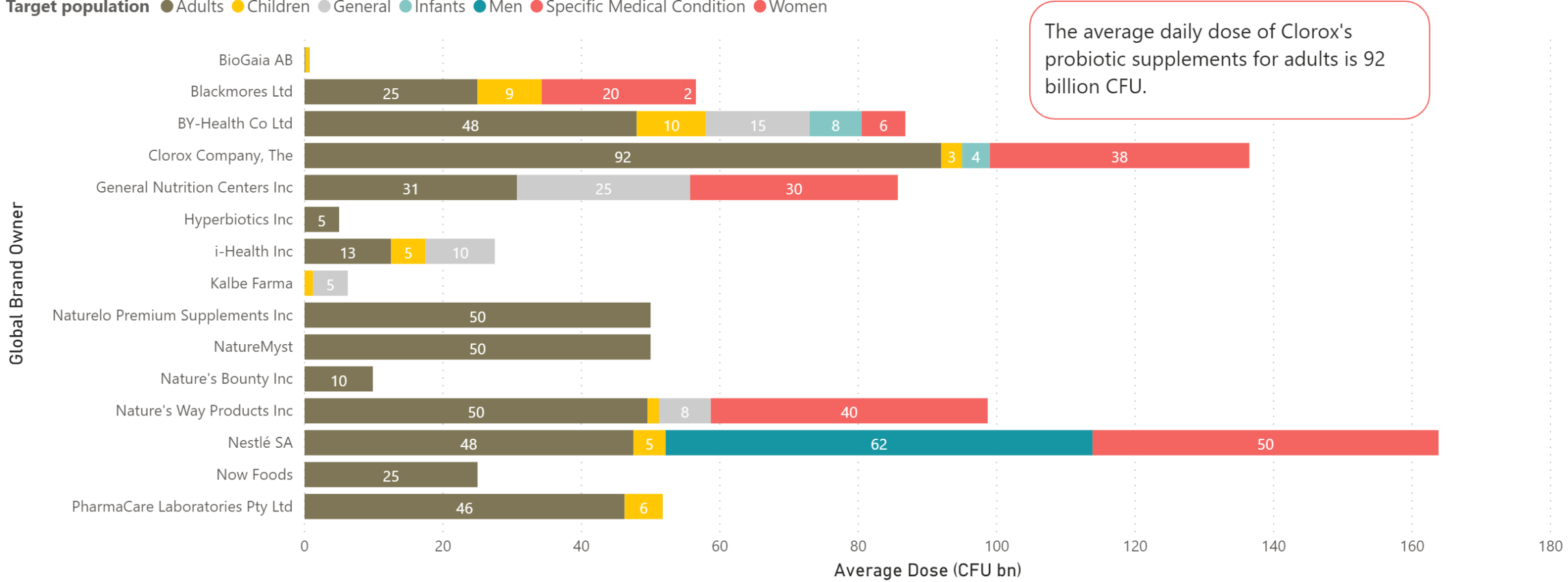
Format ● Capsules ● Chewable Tablets ● Chocolate Balls ● Drops ● Gummies ● Packets/Sachets/Sticks ● Powder ● Tablets



The most prevalent format of probiotic supplements from Nature's Way Products is capsules, used in 10 products.

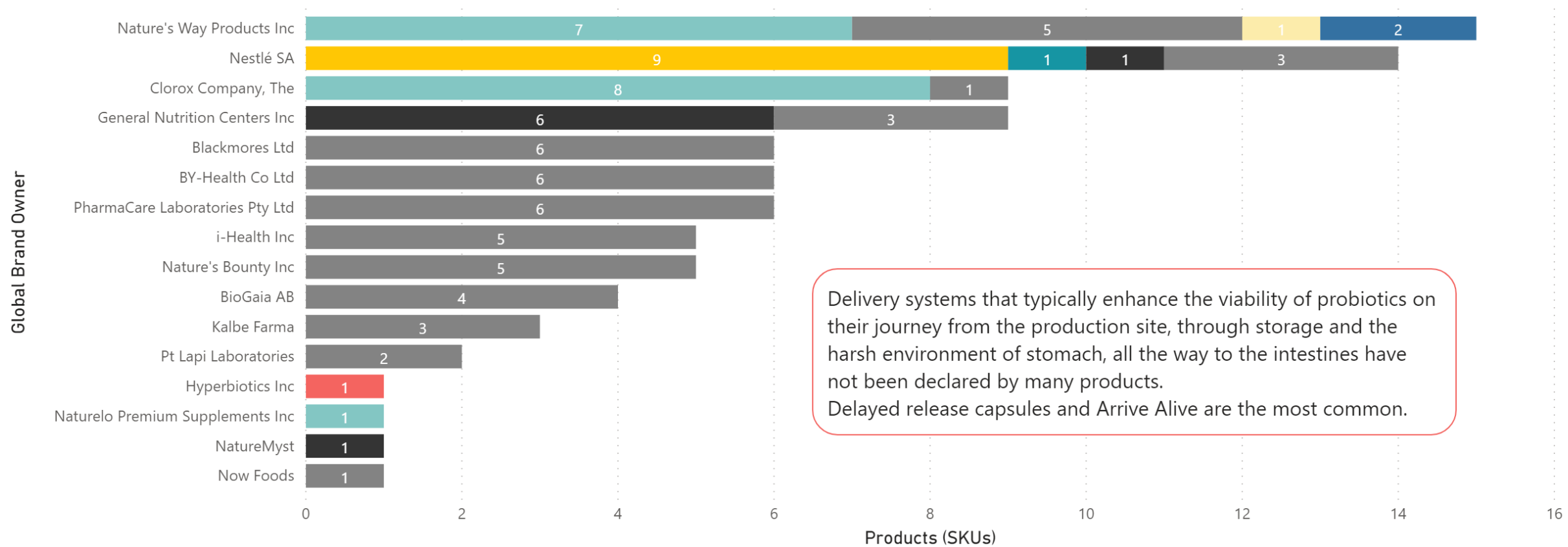
15 Most Reviewed Companies and Their Probiotic Supplements by Average Daily Dose

Target population ● Adults ● Children ● General ● Infants ● Men ● Specific Medical Condition ● Women



15 Most Reviewed Companies and Their Probiotic Supplements by Delivery System

System ● Arrive Alive ● BioProtect Packaging ● BIO-tract ● Delayed Release Capsules ● Generic Claim ● n/a ● Targeted Release ● True Release Enteric Coating

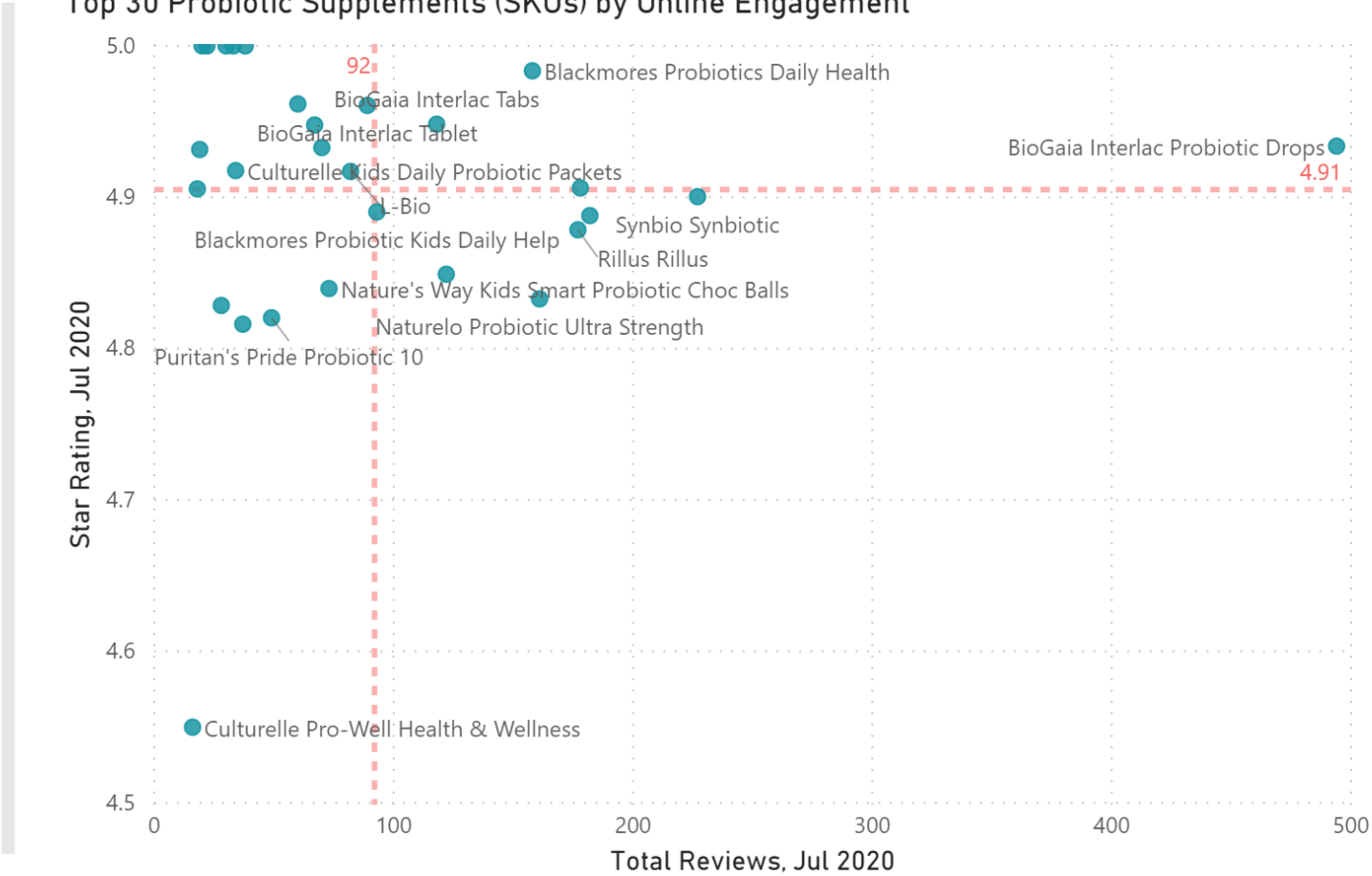


Delivery systems that typically enhance the viability of probiotics on their journey from the production site, through storage and the harsh environment of stomach, all the way to the intestines have not been declared by many products. Delayed release capsules and Arrive Alive are the most common.

Top 5 most reviewed products in Indonesia include:

Product (SKU)	Total Reviews, Jul 2020	Star Rating, Jul 2020	Average Price US\$, Jul 2020
BioGaia Interlac Probiotic Drops	494	4.9	21.1
Synbio Synbiotic	227	4.9	9.4
Life-Space Broad Spectrum Probiotic	182	4.9	39.1
Life-Space Probiotic Powder for Baby	178	4.9	29.2
Rillus Rillus	177	4.9	17.4

Top 30 Probiotic Supplements (SKUs) by Online Engagement



Note: The red dotted lines show the average star rating and average number of reviews.

## PROBIOTIC SUPPLEMENTS IN E-COMMERCE

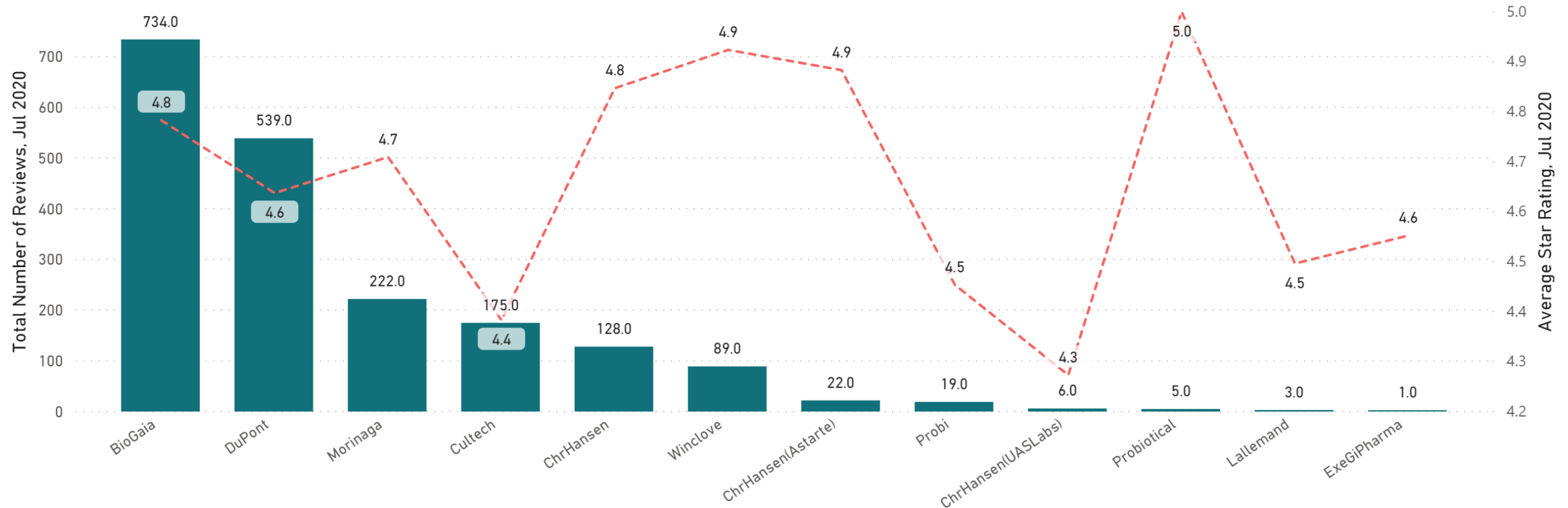
- COUNTRY OVERVIEW
- PRODUCT ANALYSIS BY
  - TARGET POPULATION
  - FORMAT
  - PRICE
  - DELIVERY SYSTEM
- HEALTH BENEFIT ANALYSIS WITH FOCUS ON
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  - ON PACK
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- COMPETITIVE LANDSCAPE
- **SUPPLY CHAIN**
- INGREDIENTS BY
  - SPECIES/STRAINS: GENERIC VERSUS PROPRIETARY
  - PREBIOTICS
  - DOSAGE
- METHODOLOGY



Top 15 Suppliers by Numer of Reviews, 2020

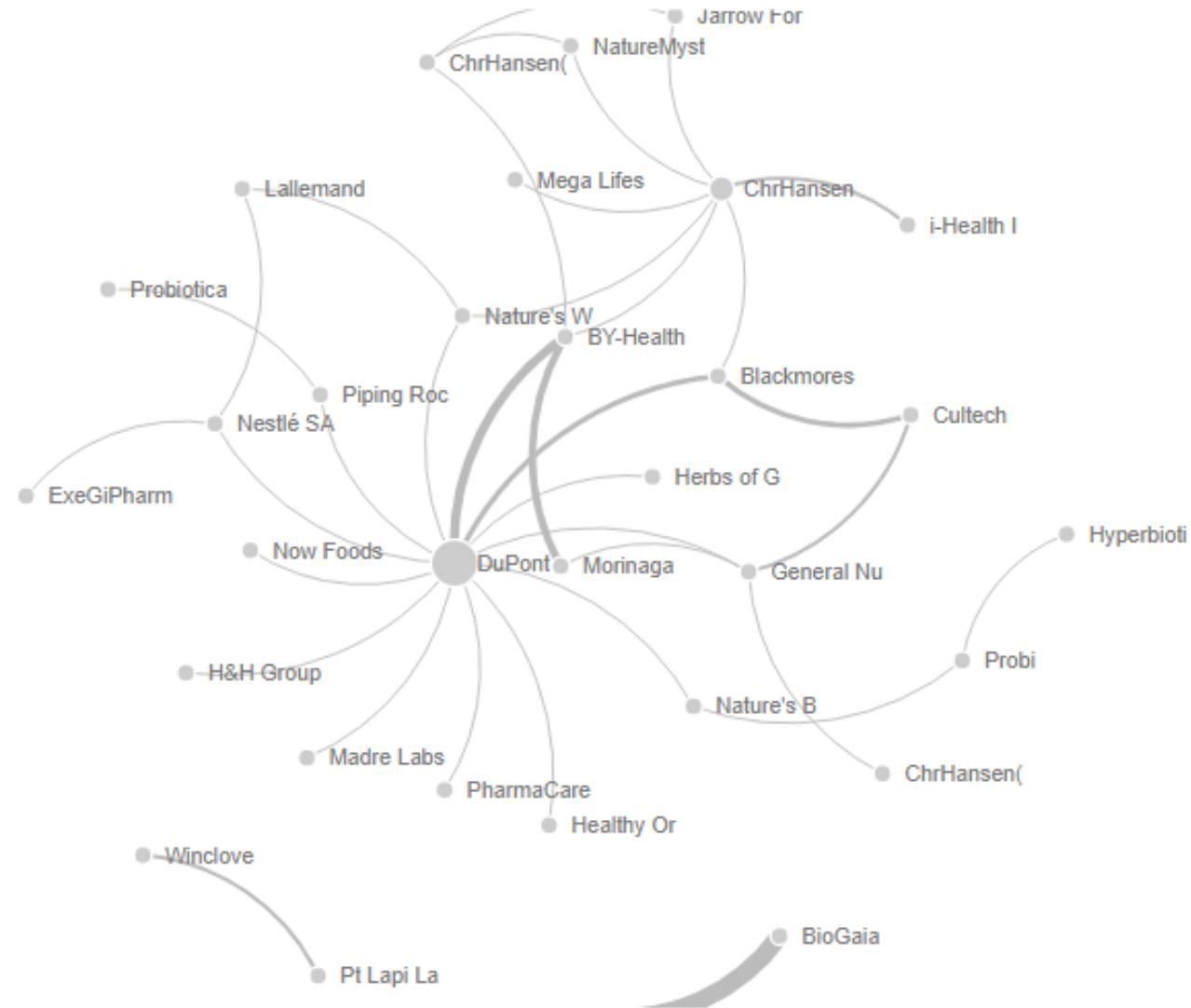
● Total Number of Reviews, Jul 2020 ● Average Star Rating, Jul 2020

BioGaia, DuPont, and Morinaga record the largest volume of online engagement for their probiotics supplements out of all suppliers whose proprietary strains are listed on product labels.



This visual maps out the online engagement across the supply chain, linking Suppliers and their Global Brand Owner partners by number of reviews as of July 2020.

The bolder the node, the more reviews.







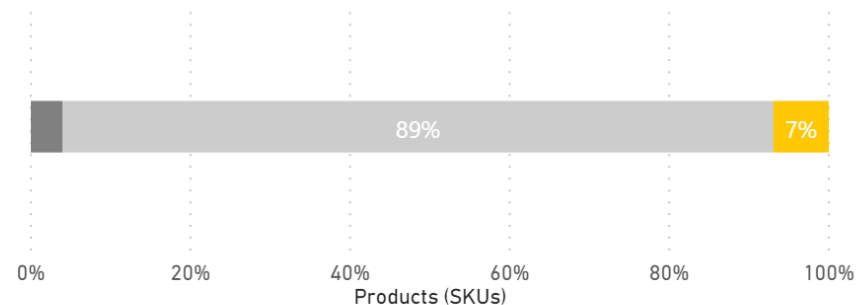
This slide analyses geographical sourcing of probiotics in Indonesia. Each product sold on the e-commerce market is counted **only once**, regardless of the volume sold. The origin information is collected from product packaging, for example from a claim 'Made in USA'.

Analyzing the sourcing structure in July 2020:

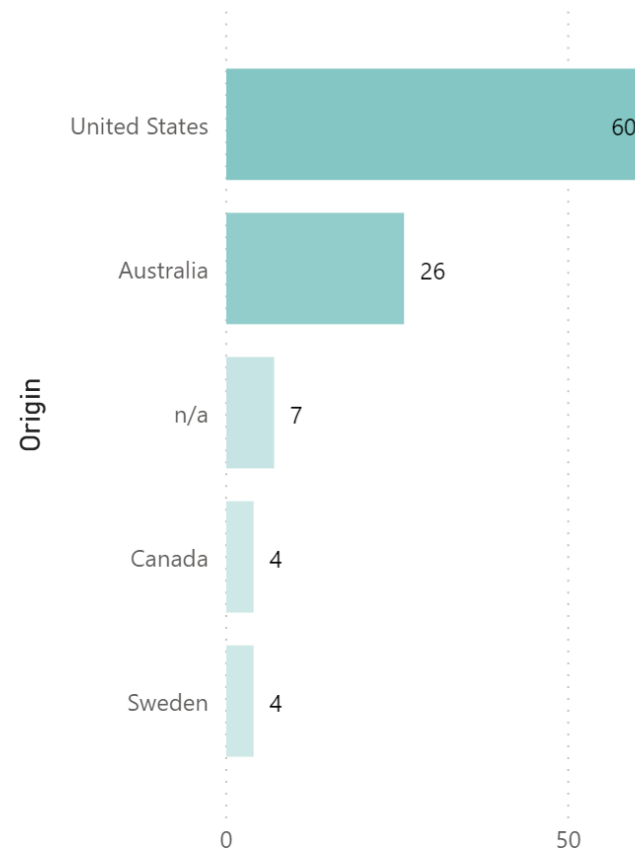
- no locally produced products were captured, with those sourced from Australia leading with **953** reviews.
- top three origins from where products gain most reviews include: Australia, Sweden, United States .

% of Products by Supply Source

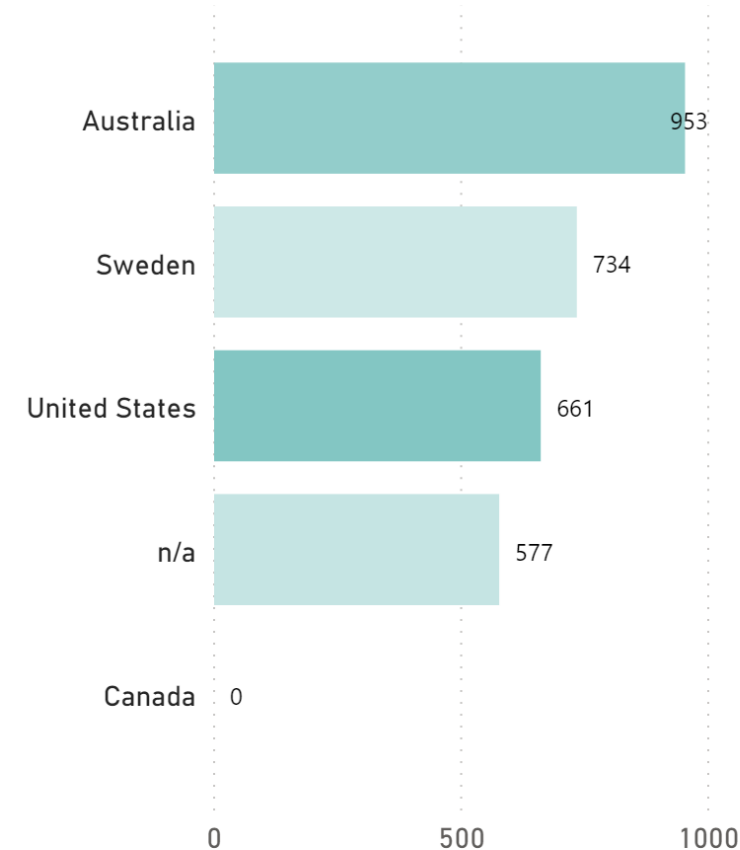
Supply Source ● EU ● International ● Not Available



Number of Products by Origin



Number of Reviews by Origin, July 2020



## PROBIOTIC SUPPLEMENTS IN E-COMMERCE

- COUNTRY OVERVIEW
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- **INGREDIENTS BY**
  - **SPECIES/STRAINS: GENERIC VERSUS PROPRIETARY**
  - **PREBIOTICS**
  - **DOSAGE**
- METHODOLOGY

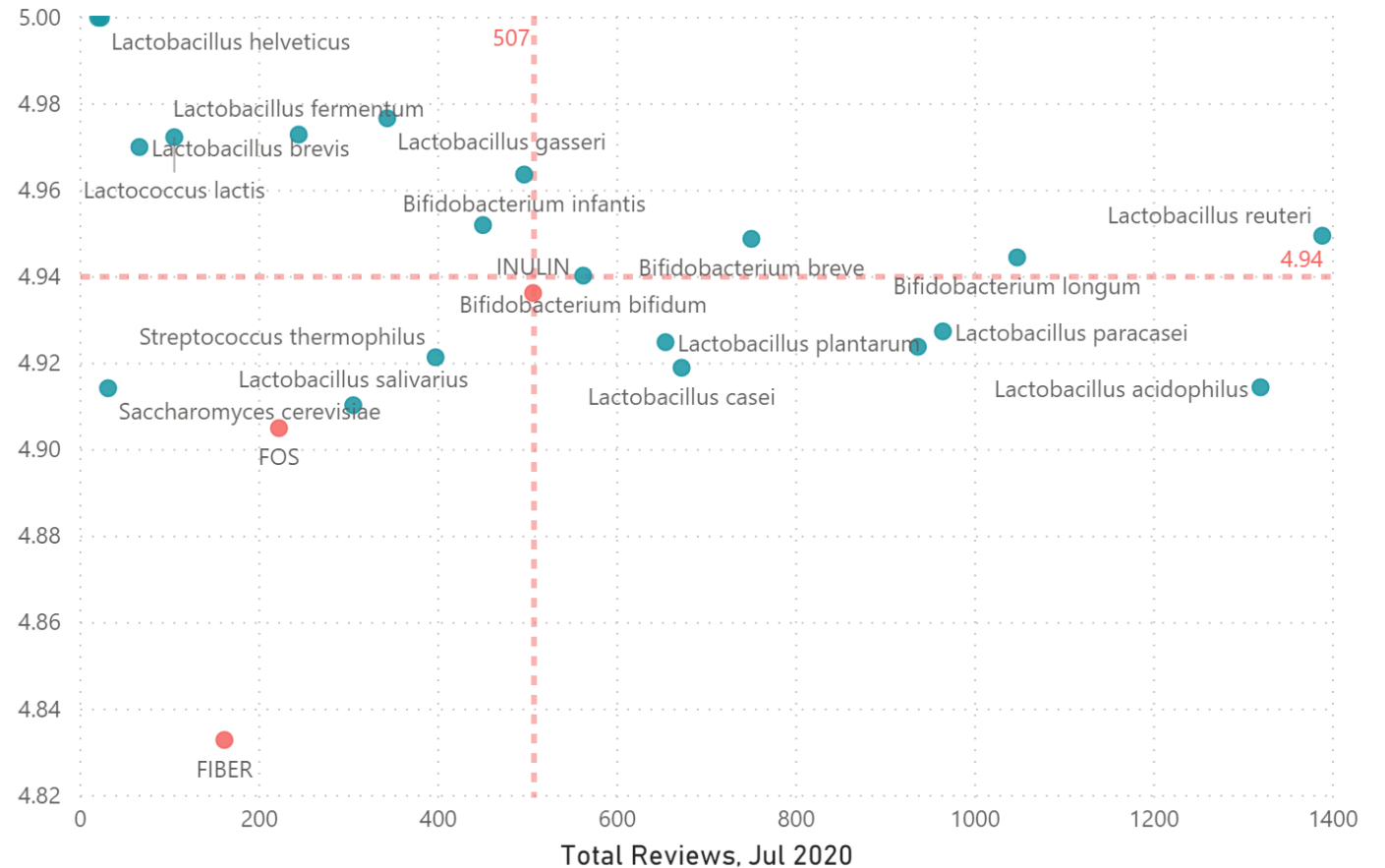


Analyzing consumer satisfaction with different species:  
 - the highest number of reviews is collected by products with Lactobacillus reuteri,  
 - the highest rated are these with Bacillus coagulans with **5.00** stars out of 5.

By genus, products containing Lactobacillus receive the largest number of reviews, and products with Kombucha cultures the smallest.

Probiotics and Preotics	Total Reviews, Jul 2020	Star Rating, Jul 2020
Lactobacillus	7696	4.9
Bifidobacterium	2943	5.0
Prebiotics	975	4.8
Streptococcus	400	4.9
Lactococcus	113	5.0
Saccharomyces	40	4.9
Bacillus	14	5.0
Kombucha cultures	0	

Probiotics (in teal) and Prebiotics (in red) by Online Engagement



Note: The red dotted lines show the average star rating and average number of reviews.

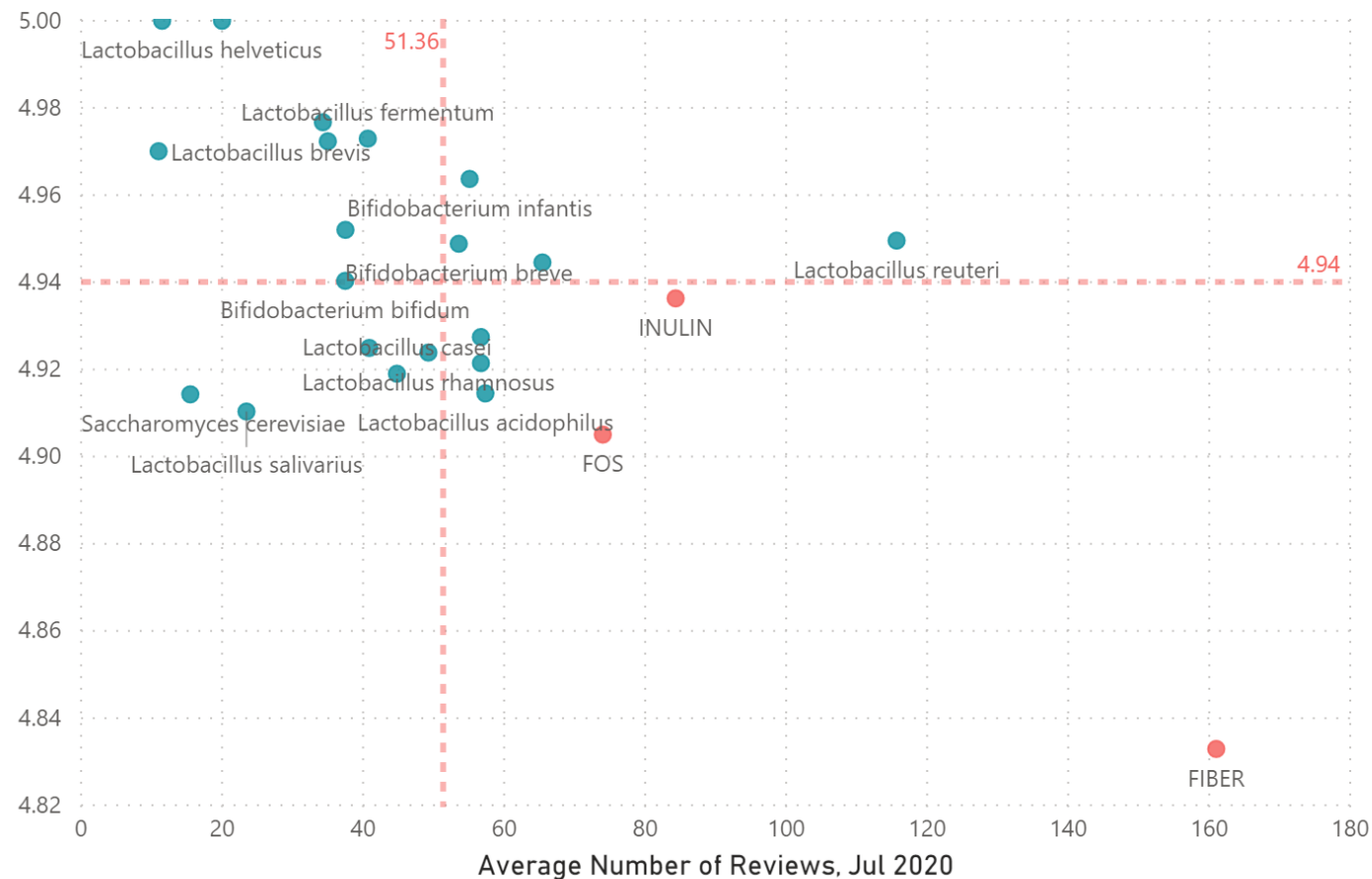
The largest average (per product) number of reviews (90) was recorded by probiotic supplements containing FOS.

The smallest number of reviews (31) was recorded by an average probiotic containing Lactobacillus brevis.

The final section of the report is dedicated to the analysis of probiotics and prebiotics present in product formulations.

Probiotics, Preotics, Postbiotics	Average Number of Reviews, Jul 2020	No of Products Captured
Streptococcus	36	11
Prebiotics	26	38
Bifidobacterium	21	59
Lactobacillus	20	95
Lactococcus	16	7
Saccharomyces	4	9
Bacillus	3	5
Kombucha cultures	0	1

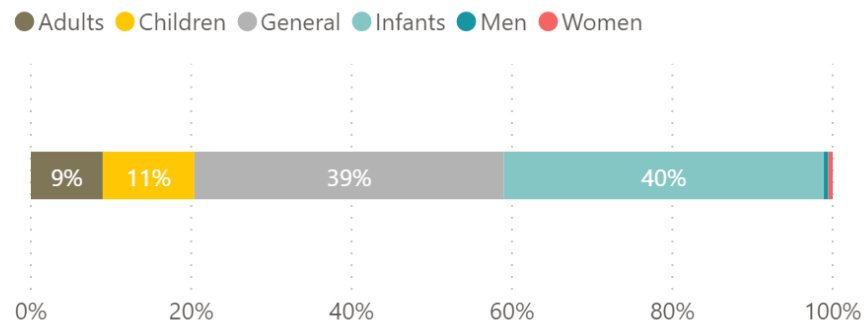
Probiotics (in teal) and Prebiotics (in red) by Average (per Product) Online Engagement



Note: The red dotted lines show the average star rating and average number of reviews.

# PROBIOTIC SUPPLEMENTS BY POPULATION & REVIEWS

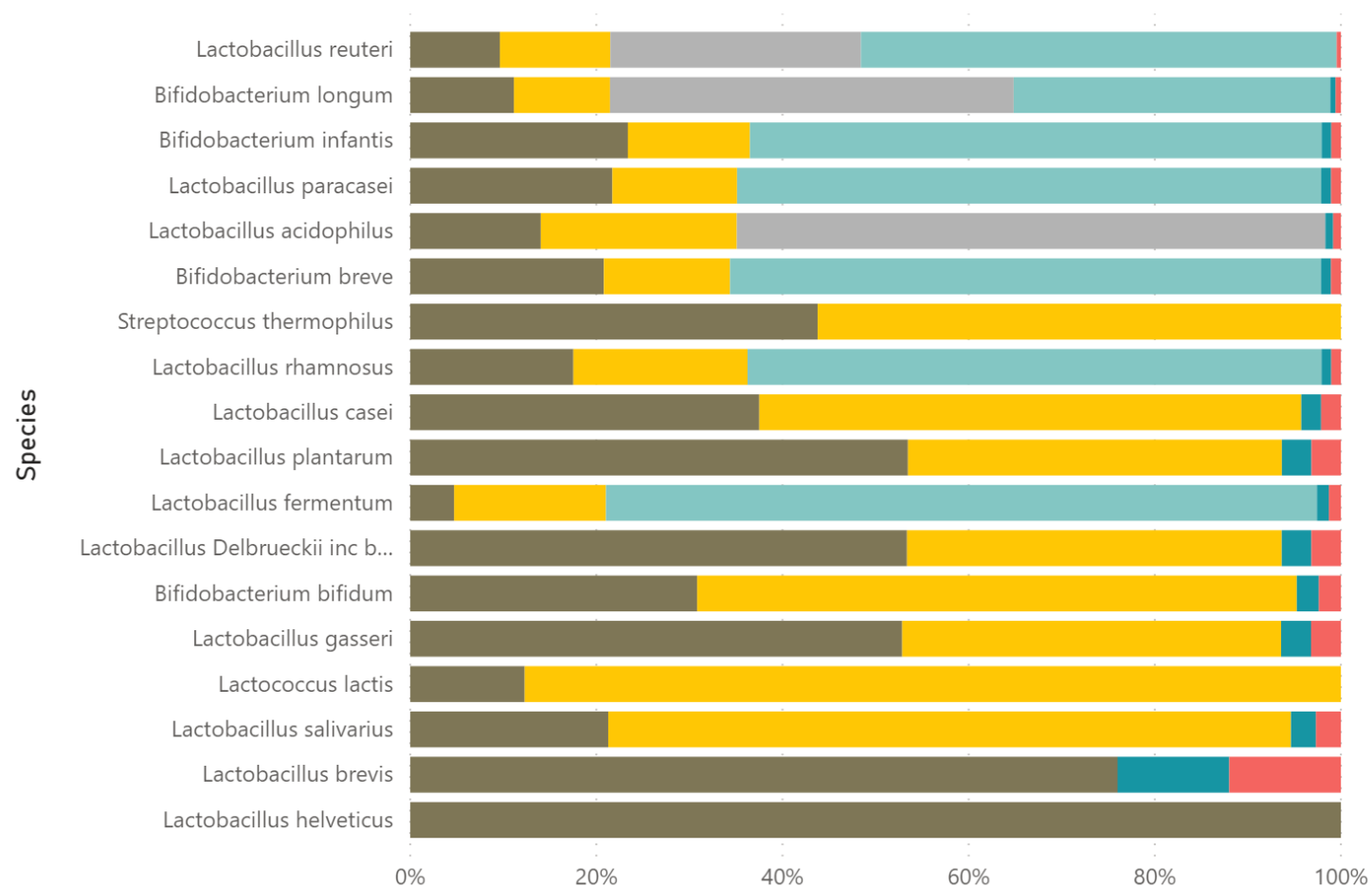
Probiotics by Target Population and Average (per Product) Number of Reviews



Species	Average Number of Reviews, Jul 2020	No of Products Captured
Lactobacillus	20	95
Bifidobacterium	21	59
Streptococcus	36	11
Saccharomyces	4	9
Lactococcus	16	7
Bacillus	3	5
Kombucha cultures	0	1

Species by Target Population and Average (per Product) Number of Reviews

Target population ● Adults ● Children ● General ● Infants ● Men ● Women



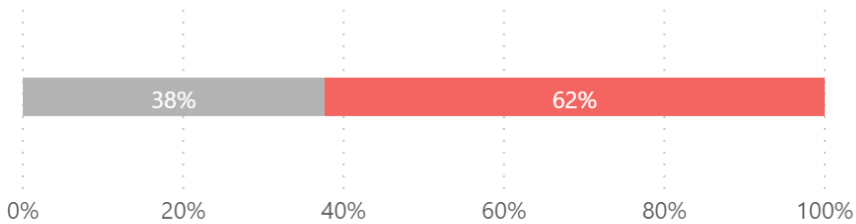
# PROBIOTIC SUPPLEMENTS: SPECIES BY TYPE, COUNT, DOSE & POPULATION

Star Rating of probiotic supplements formulated with

**4.91** Proprietary Strains  
**4.92** Generic Strains

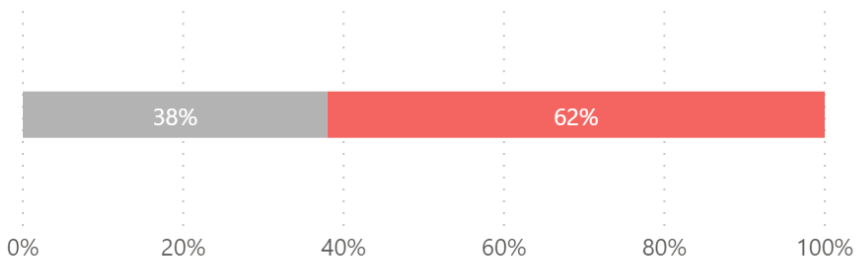
% of Probiotic Supplements by Strain Type (as Declared on the Label)

Strains ● Generic ● Proprietary



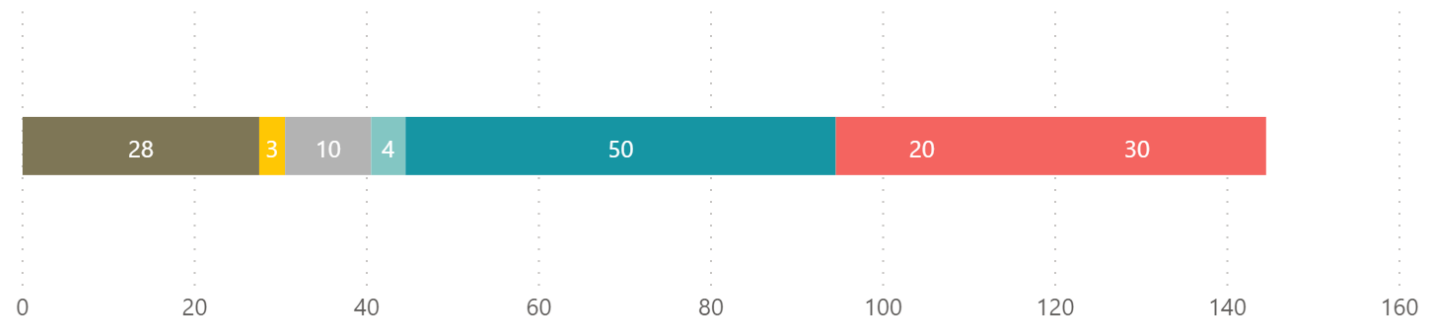
% of Reviews by Strain Type

Strains ● Generic ● Proprietary



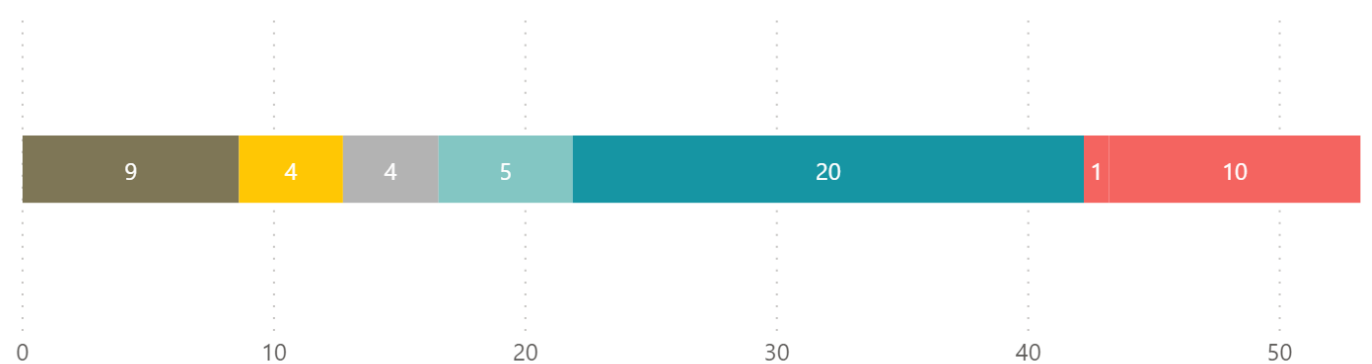
Median Daily Dose ( CFU bn)

Target population ● Adults ● Children ● General ● Infants ● Men ● Specific Medical Condition ● Women



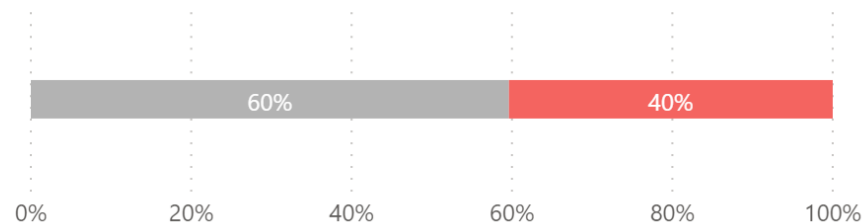
Average Number of Species per Product by Target Population, 2020

Target population ● Adults ● Children ● General ● Infants ● Men ● Specific Medical Condition ● Women



% of Probiotics Containing PREbiotics in their Formulation

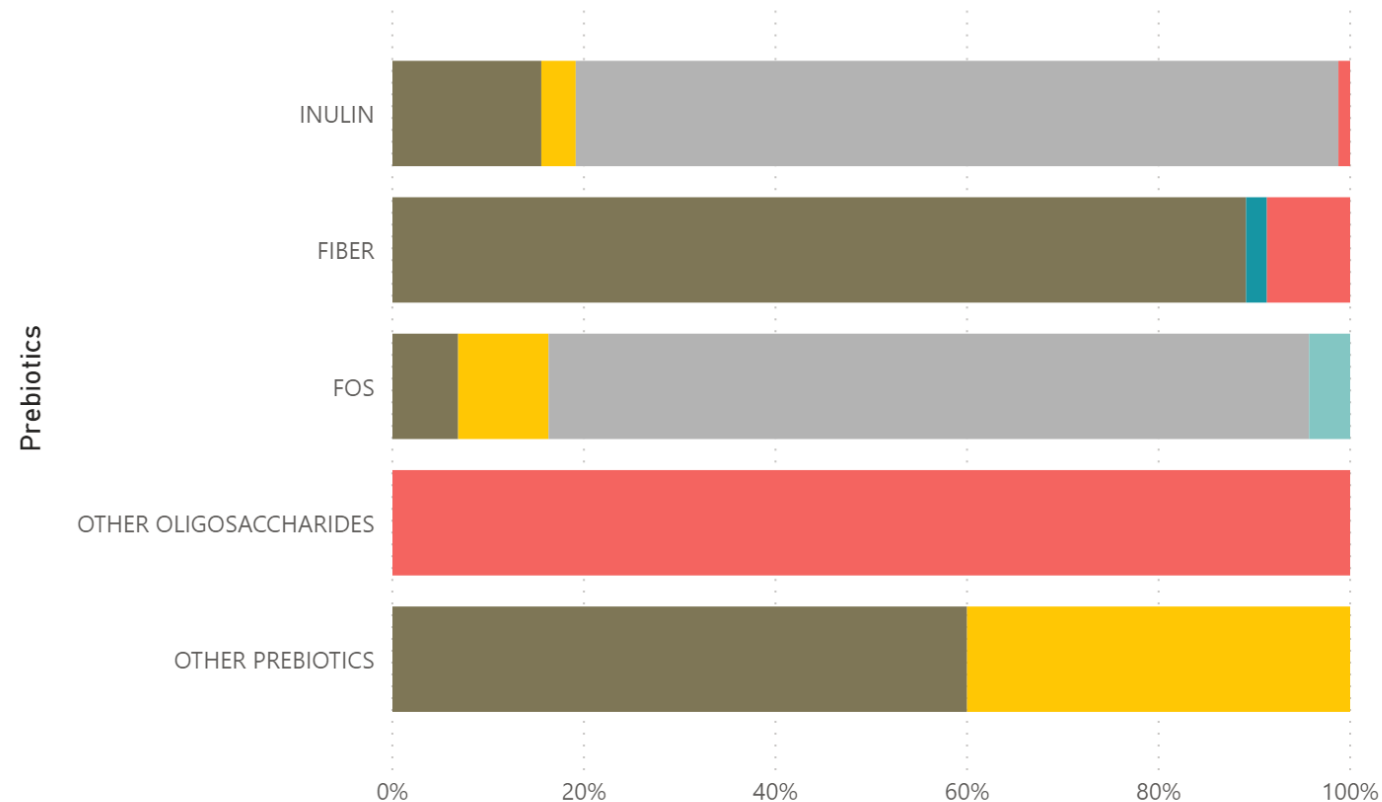
Prebiotics ● Not Present ● Present



Prebiotics	Average Number of Reviews, Jul 2020	No of Products Captured
INULIN	39	14
FIBER	24	7
FOS	21	12
OTHER OLIGOSACCHARIDES	4	1
OTHER PREBIOTICS	3	4

Prebiotics by Target Population and Average (per Product) Number of Reviews

Target population ● Adults ● Children ● General ● Infants ● Men ● Specific Medical Condition ● Women





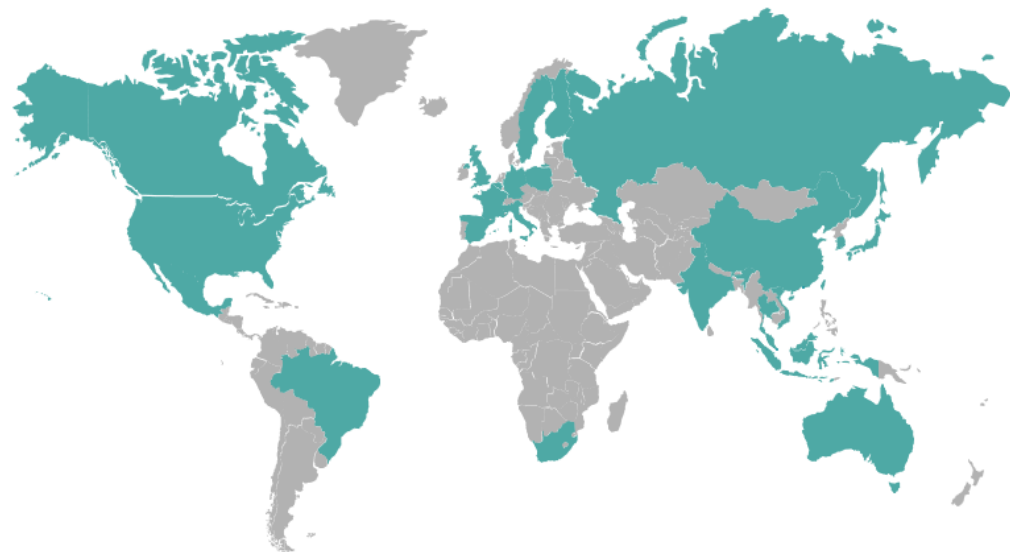
## PROBIOTIC SUPPLEMENTS IN E-COMMERCE

- COUNTRY OVERVIEW
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**Lumina**  
Intelligence



25 researched countries



Australia \* China \* India \* Indonesia \* Japan \* Malaysia \* South Korea \* Taiwan \* Thailand \* Vietnam \* United States \* Canada \* Brazil \* Mexico \* Belgium \* Finland \* France \* Germany \* Italy \* Poland \* Russia \* Spain \* Sweden \* United Kingdom \* South Africa

- Covering 25 strategic countries, Lumina Intelligence collects and analyses product information of the best-selling brands in the online space across the following categories in Probiotics:

**Probiotics**

Probiotic supplements

Probiotic juice

Probiotic cosmetics

Kombucha

- Lumina Intelligence evaluates consumer response to these products, as it tracks local customer reviews and star rankings across leading online retailers in each country.
- Captured product information includes granular ingredient profiles, dosage, target population, health benefits and product formats, flavours, origin and social labels such as free-from and clean label.
- We track products back to the supplier when a proprietary ingredient is listed on the label.

Lumina Intelligence is a unique insights service covering the probiotics markets. We focus exclusively on the e-commerce retail channel.

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), Lumina supports you in delivering a winning NPD strategy by identifying the niche areas to succeed and by providing data for your e-commerce strategy.

Why Reviews: Acting as a digitised word-of-mouth, reviews are the new digital currency for measuring consumer engagement and sentiment. Online post-purchase reviews increasingly influence purchasing decisions and allow consumers to research the efficacy of products and whether they bring the health benefits the products claim to other users.

Lumina Intelligence uses this data to support your understanding of how consumers feel about the products they have purchased and how engaged they are with brands.

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

Our reports are available to purchase individually. 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/>.

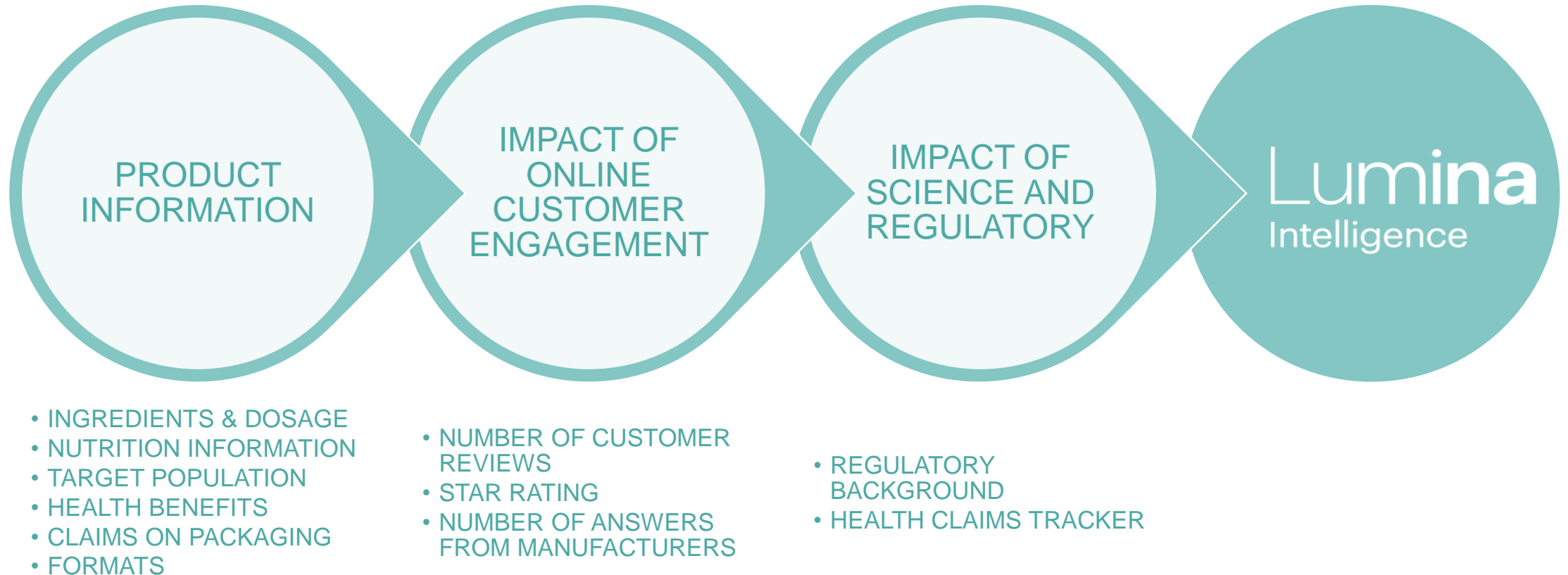
Contact us:

info@lumina-intelligence.com

Phone: +44 (0)1293 846659

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SCOPE



# Our full range of country reports for Asia: Available to buy online

## China: Probiotic supplements in e-commerce



China is a hotbed of probiotics activity, with the country propelling the category's growth across Asia. It accounts for 3 million online reviews – the largest in the world – with the vast majority of them overwhelmingly positive, averaging at 4.86 starts out of 5.

In this special report we detail the most popular products, brands, suppliers, strains and species in terms of online engagement and look at the target populations and health conditions that are driving engagement.

[Read more](#)

## Taiwan



Whilst Taiwan ranks 5th globally by reviews for probiotics, online engagement is driven by products targeting only five health benefits...

[Read more](#)

## South Korea



With nearly 500k reviews South Korea demonstrates a high level of online engagement with probiotics, ranking 2nd globally...

[Read more](#)

## Japan



Japan had spectacular rise in number of reviews - 972% between Dec 2017 to Jan 20, and 116% in the first half of 2020...

[Read more](#)

## Thailand



Probiotic Cosmetics had the highest growth rate in Thailand at 145%, in the 6 month period January 2020 – July 2020...

[Read more](#)

## Malaysia



The Malaysian consumer typically rates probiotic products highly online with an average star rating of 4.89 out of 5 in July 2020...

[Read more](#)

## Vietnam

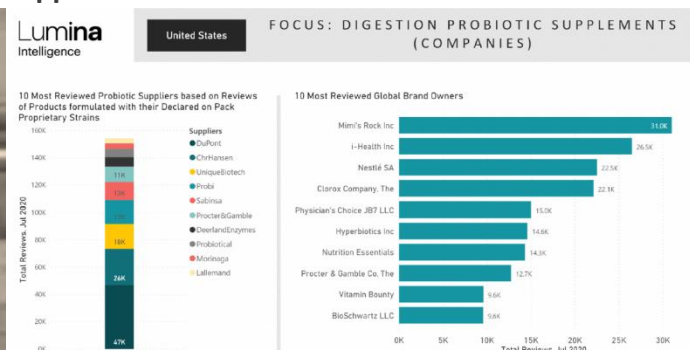


How has consumer sentiment in Vietnam evolved in the probiotic e-commerce space and how does this compare with the rest of Asia?

[Read more](#)

# Our full range of country reports for EMEA and US: Available to buy online

## USA: Probiotic supplements in e-commerce



With 46% share, the United States is already the leading probiotic supplement e-commerce market globally, based on the research of 20 key countries, and this only looks set to grow as public interest in the benefits of a healthy microbiome for immune health increases, and online shopping in general surges. As part of our new series of country fact sheets, this report looks at the drivers of the well-established probiotic supplements e-commerce marketplace in the US.

### Did you know?

- E-commerce is the place of growth for American probiotic supplements, with consumer engagement rising by 34% in the first half of 2020 to reach 307 thousand reviews (July 2020).
- While talk of pill fatigue has been ongoing for several years in the US, capsules are still the most popular format for probiotics in the US market. Capsules are used in 64% of products, but command 78% of all reviews.
- Probiotic supplements continue to be affordable within the US, with the average price at US\$28 per pack.

[Read more](#)

## Canada



Canada sees a clear rise in customer engagement with probiotics in the first half of 2020, with the reviews up by 303%...

[Read more](#)

## India



India's rapidly advancing probiotic e-commerce market sees reviews up 468% in the 6 month period January to July 2020...

[Read more](#)

## Australia



In Australia, with the number of customer reviews rises by 192% in the first half of 2020 compared to 36% in the previous six months...

[Read more](#)

## Spain



After a slow start in the adoption with e-commerce up to the end of 2018, Spain has seen an exciting acceleration of engagement...

[Read more](#)