



Probiotics on Amazon:

five-country analysis
highlights key market
differences





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The analysis

Within the [ProbioticScanner](#), we had the opportunity to collect several insights into the evolution of the probiotics market. In this document, we would like to share some interesting findings from an analysis of probiotics sold on the Amazon Marketplace across five major European countries.

This analysis, developed in collaboration with our partner XChannel, reveals distinct differences in how consumers in Italy, France, Germany, Spain, and the UK search for, select, and purchase probiotic products on Amazon. The study examined search volumes, keyword trends, top-selling product characteristics, and pricing dynamics in each country—providing a detailed snapshot of market opportunities and consumer behaviors.

Below are some of the key findings and insights.

Search volumes: Italy, Germany, and the UK outpace Spain and France

One of the most striking findings is the disparity in total probiotic-related searches on Amazon. Italy, Germany, and the UK all show significantly higher search volumes—ranging from approximately 1.6 million to over 2 million searches in the last 360



days—while Spain and France register noticeably lower totals, at 739,064 and 577,344, respectively.

Despite its lower volume, Spain boasts a +31.79% annual growth rate in searches, reflecting rapidly expanding consumer interest.

France, meanwhile, shows more moderate but steady growth (+17.36% over the past 360 days, +7.31% in the last quarter).

Country	Last 360-Day Search Volume	Last 90-Day Search Volume	360-Day Growth Rate	90-Day Growth Rate	Total Probiotic-Related Keywords	% Brand Keywords	# of Top Products (% of Total Clicks)
Italy	1,607,855	451,600	+0.91%	+26.87%	720	25.6%	42 (90%)
Spain	739,064	219,738	+31.79%	+9.61%	658	20.9%	23 (95%)
France	577,344	161,360	+17.36%	+7.31%	923	2.2%	18 (94%)
Germany	1,826,806	550,357	+12.68%	+31.82%	390	24.4%	10 (~100%)
UK	2,077,925	537,335	+6.28%	+0.77%	290	23.1%	30 (94%)

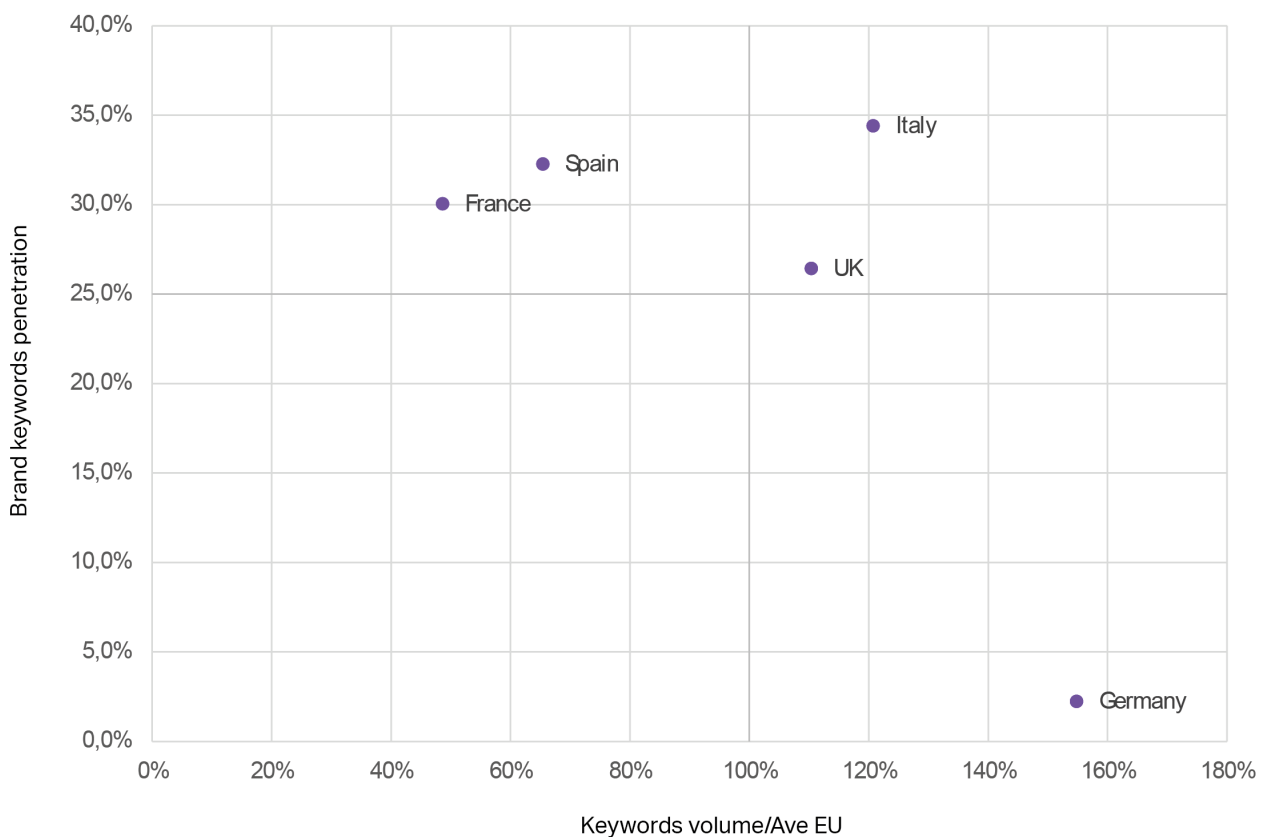
Keyword focus: Germany's generic dominance vs. Italy's brand searches

Clear national patterns emerge when analyzing the keywords used by consumers:

- In **Germany**, just 2.2% of probiotic-related Amazon searches include a specific brand name. Shoppers seem to focus more on generic search

terms such as "Probiotika," dosage, or specific health benefits.

- In **Italy**, 25.6% of searches are brand-driven—a higher share than in the UK, Spain, or France (all between 20% and 24%). This points to a more brand-sensitive Italian consumer base, or at least a greater awareness of brand names during initial searches.



Concentration of clicks: fragmented Italy vs. concentrated Germany

The degree to which product clicks are concentrated among top references varies notably:

- In **Italy**, 42 top-selling items capture about 90% of category clicks. However, when broken down

by brand, clicks are more widely distributed, suggesting robust competition.

- In **Germany**, just 10 products dominate nearly 100% of the clicks, indicating strong consumer loyalty or high recognition of a few dominant products.

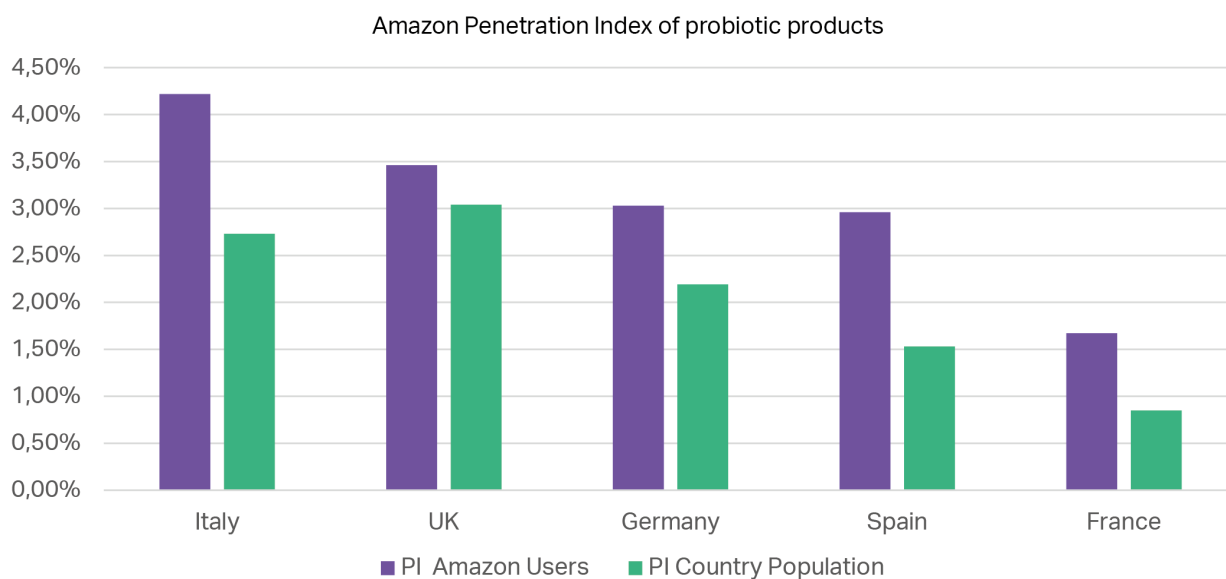
Italy and UK show the highest penetration indexes

Market engagement can also be analyzed through penetration rates, comparing the estimated number of Amazon accounts purchasing probiotics over the past 360 days against either the total number of active Amazon users or the overall population.

Italy stands out with the highest Amazon-user-based Penetration Index (PI) at 4.22%, indicating a very active base of probiotic shoppers among online consumers.

- The **UK** records the highest population-based PI (3.04%), showing that while fewer Amazon users buy probiotics compared to Italy, these buyers represent a larger portion of the overall UK population.
- **Germany** and **Spain** fall in the middle, both exceeding 2% in population-based PI.
- **France** lags with a 0.85% PI, indicating potential for market expansion.

These figures highlight how e-commerce interest in probiotics translates into real-world consumer reach, with notable differences between national markets.



Formulation trends: Italy's diversity vs. capsule dominance elsewhere

Product formulation also shows country-specific preferences:

- In **Italy**, only 48% of top products are sold in capsule form, suggesting significant diversity, including sachets, drops, and tablets.
- In **France, Germany, Spain**, and the **UK**, capsule-based formats dominate, representing 87–91% of top products. This reflects a consistent consumer or brand preference across these markets.

Pricing insights: variation in daily dose and pack costs

An in-depth pricing analysis reveals that both the cost per daily dose and the average pack price vary significantly by country. UK prices below have been converted to euros for comparison.

Italy's higher average daily dose price (0.80 €) and more diverse formulations suggest that Italian consumers may value product variety and are willing to

pay a premium for niche formats. *(Please note that Italy also shows the highest variable discounts, which are not included in this analysis.)*

Germany has one of the highest average pack prices (22.89 €), consistent with strong brand recognition and fewer competing references.

In the UK, the average cost per daily dose (0.51 €) is significantly lower than in Italy or France, while Spain falls somewhere in between.

Country	Top Products	Capsule Formulation %	Avg. Doses per Pack	Avg. Price per Daily Dose (€)	Daily Dose Price Range (€)	Avg. Pack Price (€)	Pack Price Range (€)
Italy	42	48%	30	0.80 €	0.25€–2.07€	17.57 €	7.00€–29.99€
UK	30	87%	63	0.51 €	0.17€–1.54€	18.91 €	9.10€–34.68€
Germany	10	90%	57	0.52 €	0.21€–1.17€	22.89 €	9.99€–34.99€
Spain	23	91%	55	0.53 €	0.16€–1.33€	21.79 €	7.99€–39.99€
France	18	89%	40	0.60 €	0.21€–1.40€	19.09 €	6.34€–29.95€

Conclusion

Data from XChannel highlight how different consumer preferences, product formats, and pricing strategies shape the probiotics market on Amazon across Europe. Italy, Germany, and the UK lead in total search volumes, while Spain's rapid growth indicates strong momentum.

Formulation preferences vary, with Italy embracing more diversity beyond capsules, while other markets lean heavily toward capsule-based solutions. Pricing analysis reveals that consumer willingness to pay is shaped by multiple factors, including brand awareness,

product attributes, and regulatory environments.

For companies aiming to succeed in these evolving online ecosystems, tailoring product formats, pricing strategies, and marketing messages to local consumer expectations is essential. By staying attuned to the unique dynamics of each Amazon marketplace, industry players can effectively position themselves and capitalize on the growing demand for probiotics.

For additional insights into probiotics and the microbiome, please do not hesitate to contact us and continue following our updates at [MicrobiomePost](#).



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