

Immunity

A Hot Topic report from Nicholas Hall's Reports

Key Features

- An in-depth exploration of the Immunity market globally
- Case studies of **key brands**
- Dedicated **Outlook** chapter focused on the future of Immunity
- A wide spectrum of CHC categories covered, including:
 Immune supplements Vitamin C Vitamin D Probiotics for immunity
 Multivitamins for immunity Zinc supplements Chyawanprash
 Oral & nasal sanitisers Cough & cold immunity extensions
 Antivirals Antiseptics & disinfectants Foods & beverages

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Immunity has rarely been a hotter topic globally than right now. In a world scarred by the effects of Covid, consumers are seeking immunity self-care solutions to keep themselves & their families as safe as possible. Awareness of the importance of maintaining the body's immune system is at a high, with surveys suggesting more consumers than ever are turning to supplements and immunity products.

Categories boosted by this increased demand include immune supplements, vitamins C & D, zinc supplements, probiotics, antivirals and many others.

The shift from treatment products towards prevention – already an established trend across many markets – has accelerated considerably, reflecting changing consumer priorities. Adjacent issues have also had a bearing: lack of sleep, stress and anxiety, rising dramatically in incidence during the pandemic, are key causes of lowered immunity.

This Hot Topic report delves into every aspect of Immunity, charting the rapid growth of existing categories, highlighting innovative NPD, and assessing the prospects for this dynamic health area.

The report investigates key questions surrounding immunity, including:

- Will consumer interest in boosting immunity outlast Covid?
 How likely is a resurgence in seasonal respiratory viruses this winter?
 Is the shift to prevention products sustainable?
- What are the latest trends & developments among established immunity ingredients like echinacea, black elderberry and zinc?
 What are the most promising new ingredients?
- Which brands are flourishing?
 What can be learned from the most successful immunity brands?
- Is consumer interest in immune support reflected in activity in the MLM and online space?
- Where are the future opportunities?
 What will the immunity market look like in 5-10 years?









Chapters

Overview
Consumer attitudes to immunity
Immune supplements
Vitamin C

Vitamin D

Zinc

Probiotics

Multivitamins

OTC tonic drinks

Chyawanprash

Antivirals

Oral & nasal sanitisers

CCA brands targeting immunity

Antiseptics & disinfectants

Foods & beverages

Inner defence

CBD for immunity

Immunity for active consumers

Personalised immunity

Regimen

Direct selling
Outlook



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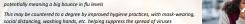
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Overview | A major flu revival imminent?

How likely is a resurgence in seasonal respiratory viruses this winter?

Experts suggest people have lost their natural immunity to the common flu virus, potentially meaning a big bounce in flu levels



- . Cough & cold season was historically weak in 2020/21 (see sidebar below)
- With lockdown restrictions, increased hygiene measures and social distancing in force for over a year to reduce the contracting Covid-19, the incidence of common respiratory viruses has been very low
- However, with the lack of exposure to illnesses (especially among young children), many people have not built up antibodies, meaning immune systems may have been inadvertently weakened
- This has prompted warnings of a potential surge in influenza with reports from UK and USA suggesting a severe cold & flu season may be in store during winter 2021-22
- Data from UK's Office of National Statistics show that in the week ending 11th lune 84 death certificates issued in England & Wales mentioned Covid, while 1,163 deaths involving flu and pneumonia were registered
- Additionally, a study by Houston Methodist Research Institute shows the rapid re-emergence of seasonal respiratory viruses following the relaxing of Covid-19 restrictions in Texas in March 2021

Usual flu & respiratory viruses absent during Covid pandemic

Cases of flu and other respiratory viruses were significantly reduced during the Covid-19 pandemic, according to research presented at the virtual European Congress of Clinical Microbiology & Infectious Diseases (9-12 July 2021). In a retrospective study, Wayne State University researchers compared PCR test results for various infections, such as influenza A and B and respiratory syncytial virus (RSV). In the 2019-2020 season, 11.5% and 12.4% of influenza A tests, 13.1% and 20.2% of influenza B tests and 9% and 23.7% of RSV tests were positive in adults and children respectively. In the 2020-2021 season, all flu and RSV tests were negative in adults and children with the exception of one positive RSV test in a child.

Chyawanprash | Covid-19 claim and adjusted strategy boosted sales for Dabur

- However, advertising and distributing Dabur Chyawanprash proved a challenge during the pandemic as people were rejuctant to step out of their house
- Housebound audiences stopped buying newspapers (the main vehicle for print ads) and there were fewer people out & about to see out-of-home billboards and listen to radio ads in cars
- As a result, Dabur launched a Covid-adapted marketing strategy focused on TV and digital, adopting an information dissemination approach that educated consumers about the immunity benefits of chyawanprash, including via HCP endorsement
- Dabur also introduced 12 Immunity Vans during the pandemic to deliver immunity-boosting products such as Dabur Chyawanprash to consumers' doorsteps - bringing the brand directly to consumers
- Dabur sponsored a clinical trial investigating Covid-19 incidence among participants receiving Dabur Chyawanprash which found 2.38% tested positive for Covid-19 vs 28.57% in the control group - these findings provided a strong sales boost for the brand
- Additionally, it helped to justify the brand's premium pricing and to mitigate the threat from a lower-cost mid-tier entry from Patanjali
- Traditionally the chyawanprash category is heavily reliant on the severity of the winter season, when purchases will usually peak, but Dabur's current A+P campaign alongside the Covid claim encourages wider use throughout the year





Foods & beverages | Brands for immunity seeing rapid expansion

With soaring consumer interest, immune health opportunity is being fully exploited by food & drink brands

- 6 of 10 global consumers are increasingly looking for food & beverage products that support their immune health (Innova Consumer Survey 2020), with 1 in 3 saying concerns about immune health increased in 2020 over 2019
- Improving immune function was a top priority for consumers even before Covid pandemic, e.g. 87% of those surveyed in 2017 expressed interest in purchasing beverages and foods with immune-health benefits (Mintel's Nutrition and Performance Drinks - US, March 2017)
- Immunity-boosting ingredients like turmeric, green tea, garlic, honey and citrus fruits are being added to foods & beverages in recognition of their contribution towards a well-functioning immune system
- · Diverse range of products are explicitly adding immunity positioning, claiming "Immune support" or similar on packaging
- According to Innova, immune support claims are focused on three food & drink categories
- Babies & Toddlers (particularly milks)
- Sports Nutrition (powders)
- > Dairy (drinking yogurts / fermented beverages)
- Smaller but growing subcategories include soft drinks and hot beverages, with a particular interest in juice drinks and tea
- Convenience and low price point are key factors unlike with
- supplements, consumers buying an immunity beverage are not committing to buying a 30-60-pill bottle at a premium price BUT industry bodies counsel caution - it is all too easy to fall into the trap of making unsupported health claims
- Brands must ensure that messaging accurately conveys all ingredient benefits, without embellishment / overclaiming; simple content with straightforward advice is the best approach



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