

# Immunity 2021

## A Hot Topic report from Nicholas Hall's Reports

(260 Pages)

Definitions & methodology (2 pages)

### **Overview** (8 pages)

How immunity became one of the hottest trends in healthcare (1 page)

In a pandemic-hit world, immunity has become a top-of-mind concern for many consumers

The shift from prevention to treatment (1 page)

*Chart: Global leading CHC growth categories 2020 (MSP, \$mn)*

Is this shift to prevention sustainable?

The existing CHC market for immunity (2 pages)

CHC categories boosted by this increased demand for preventive products are multiple

Assessing the size of the immunity market (2 pages)

Sales of immunity products primarily drawn from among vitamins, minerals & supplements

Most categories in VMS Immunity market posted dynamic growth

*Chart: VMS Immunity market by category 2020 (MSP, \$mn)*

A major flu revival imminent? (2 pages)

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

Usual flu & respiratory viruses absent during Covid pandemic

The role of flu vaccinations

### **Consumer attitudes to immunity** (4 pages)

Prevention a growing priority (1 page)

Surveys reveal consumer insights (2 pages)

*Chart: Percentage who believe stated ingredients support immunity*

Recap of key survey findings (1 page)

### **Immune supplements** (34 pages)

Thriving category sees record 2020 sales (1 page)

*Chart: Global immune supplements sales 2016-20 (MSP, \$mn)*  
*Chart: Leading immune supplements markets 2020 (MSP, \$mn)*

Further bolstered by dramatic upturn in launch activity 1 (page)  
Defining immune supplements

*Chart: Global immune supplements NPD activity 2013-21*

Leading brands grew rapidly across the board (1 page)  
*Chart: Global leading immune supplements 2020 (MSP, \$mn)*

USA driven by high launch activity and A+P investment (5 pages)  
*Chart: USA immune supplements sales 2016-20 (MSP, \$mn)*  
*Chart: USA leading immune supplements 2020 (MSP, \$mn)*

Airborne consolidates its No.1 US ranking (2 pages)  
*Chart: Airborne sales 2016-20 (MSP, \$mn)*  
Key learnings

Elderberry-based Sambucol continues formidable rise (3 pages)  
*Chart: Sambucol sales 2016-20 (MSP, \$mn)*  
*Chart: Sambucol sales by category 2020*  
*Chart: Sambucol immune supplements sales 2016-20 (MSP, \$mn)*  
*Chart: Sambucol leading immune supplements markets 2020 (MSP, \$mn)*  
Key learnings

Indonesia benefits from launches and educational A+P (3 pages)  
*Chart: Indonesia immune supplements sales 2016-20 (MSP, \$mn)*  
*Chart: Indonesia leading immune supplements 2020 (MSP, \$mn)*

Italy boosted by NPD as pandemic stimulates demand (2 pages)  
*Chart: Italy immune supplements sales 2016-20 (MSP, \$mn)*  
*Chart: Italy leading immune supplements 2020 (MSP, \$mn)*

Germany sees limited gains, then signs of downturn (2 pages)  
*Chart: Germany immune supplements sales 2016-20 (MSP, \$mn)*  
*Chart: Germany leading immune supplements 2020 (MSP, \$mn)*

Russia sees huge pandemic-led jump in 2020 sales (2 pages)  
*Chart: Russia immune supplements sales 2016-20 (MSP, \$mn)*  
*Chart: Russia leading immune supplements 2020 (MSP, \$mn)*

Canada experiences strong demand for echinacea (2 pages)  
*Chart: Canada immune supplements sales 2016-20 (MSP, \$mn)*  
*Chart: Canada leading immune supplements 2020 (MSP, \$mn)*

Poland growth sluggish as consumers seek alternatives (2 pages)

*Chart: Poland immune supplements sales 2016-20 (MSP, \$mn)*

*Chart: Poland leading immune supplements 2020 (MSP, \$mn)*

Mexico benefits from strong showing for Aderogyl (1 page)

*Chart: Mexico immune supplements sales 2016-20 (MSP, \$mn)*

France sales flat as consumers look to vitamin D (1 page)

*Chart: France immune supplements sales 2016-20 (MSP, \$mn)*

*Chart: France leading immune supplements 2020 (MSP, \$mn)*

Australia sees high demand prompt launch activity (2 pages)

*Chart: Australia immune supplements sales 2016-20 (MSP, \$mn)*

*Chart: Australia leading immune supplements 2020 (MSP, \$mn)*

Brazil sees new market spring up in shadow of Covid (2 pages)

*Chart: Brazil immune supplements sales 2016-20 (MSP, \$mn)*

*Chart: Brazil leading immune supplements 2020 (MSP, \$mn)*

Few new ingredient launches to expand the category (1 page)

NPD features mixture of established and new ingredients

Previous dynamism unsustainable but sales remain high (1 page)

Short-term forecast

*Chart: Global immune supplements 5 & 10 year forecast sales 2025 & 2030 (MSP, \$mn)*

## **Vitamin C (23 pages)**

Covid-19 pandemic brings big rise in immunity sales (2 pages)

*Chart: Global vitamin C supplements sales 2016-20 (MSP, \$mn)*

*Chart: Leading vitamin C supplements markets 2020 (MSP, \$mn)*

*Chart: Global immunity vitamin C supplements share 2020 (MSP, \$mn)*

*Chart: Global immunity vitamin C supplements sales 2016-20 (MSP, \$mn)*

*Chart: Leading immunity vitamin C supplements markets 2020 (MSP, \$mn)*

Immunity links well established, but is it beneficial for Covid-19? (2 pages)

Standalone vitamin C brands Emergen-C and Redoxon lead globally (1 page)

*Chart: Global leading immunity vitamin C supplements 2020 (MSP, \$mn)*

Covid-19 sees US sales break \$1bn (3 pages)

*Chart: USA vitamin C supplements sales 2016-20 (MSP, \$mn)*

*Chart: USA immunity vitamin C supplements sales 2016-20 (MSP, \$mn)*

*Chart: USA leading immunity vitamin C supplements 2020 (MSP, \$mn)*

Emergen-C established as the US vitamin C brand for immunity (2 pages)

*Chart: Emergen-C immunity vitamin C supplements sales 2016-20 (MSP, \$mn)*

Key learnings

Demand for vitamin C in China rises over immunity concerns (2 pages)

*Chart: China vitamin C supplements sales 2016-20 (MSP, \$mn)*

*Chart: China immunity vitamin C supplements sales 2016-20 (MSP, \$mn)*

*Chart: China leading immunity vitamin C supplements 2020 (MSP, \$mn)*

Sales almost double in Brazil as consumers seek immune protection (2 pages)

*Chart: Brazil vitamin C supplements sales 2016-20 (MSP, \$mn)*

*Chart: Brazil immunity vitamin C supplements sales 2016-20 (MSP, \$mn)*

*Chart: Brazil leading immunity vitamin C supplements 2020 (MSP, \$mn)*

Redoxon boosted by “triple action” claims (1 page)

*Chart: Redoxon immunity vitamin C supplements sales 2016-20 (MSP, \$mn)*

Key learnings

High levels of immunity-focused A+P in Poland (2 pages)

*Chart: Poland immunity vitamin C supplements sales 2016-20 (MSP, \$mn)*

*Chart: Poland leading immunity vitamin C supplements 2020 (MSP, \$mn)*

Immunity concerns provide big sales boost in Germany (1 page)

*Chart: Germany immunity vitamin C supplements sales 2016-20 (MSP, \$mn)*

*Chart: Germany leading immunity vitamin C supplements 2020 (MSP, \$mn)*

Launches and A+P in Australia as marketers seek to meet demand (2 pages)

*Chart: Australia immunity vitamin C supplements sales 2016-20 (MSP, \$mn)*

*Chart: Australia leading immunity vitamin C supplements 2020 (MSP, \$mn)*

Sales rocket in Italy thanks to pandemic demand (1 page)

*Chart: Italy immunity vitamin C supplements sales 2016-20 (MSP, \$mn)*

*Chart: Italy leading immunity vitamin C supplements 2020 (MSP, \$mn)*

Beauty with immunity to be an expanding niche? (1 page)

Brands with dual beauty and immunity benefits may see increased uptake in India

High vitamin C sales brought about by pandemic demand here to stay? (1 page)

Short-term forecast

*Chart: Global immunity vitamin C supplements 5 & 10 year forecast sales 2025 & 2030 (MSP, \$mn)*

## **Vitamin D (23 pages)**

### Global sales spike in 2020 (2 pages)

*Chart: Global vitamin D supplements sales 2016-20 (MSP, \$mn)*

*Chart: Leading vitamin D supplements markets 2020 (MSP, \$mn)*

*Chart: Global immunity vitamin D supplements share 2020 (MSP, \$mn)*

*Chart: Global immunity vitamin D supplements sales 2016-20 (MSP, \$mn)*

*Chart: Leading immunity vitamin D supplements markets 2020 (MSP, \$mn)*

### Studies into immune benefits of vitamin D accelerating (3 pages)

Vitamin D's links with immunity have been well established for a number of years  
Covid-19 pandemic brought vitamin D's immunity links to the fore in 2020

### Longline ranges dominate global immunity vitamin D rankings (1 page)

*Chart: Global leading immunity vitamin D supplements 2020 (MSP, \$mn)*

### US vitamin D sales rocket in 2020 thanks to immunity link (4 pages)

*Chart: USA vitamin D supplements sales 2016-20 (MSP, \$mn)*

*Chart: USA immunity vitamin D supplements sales 2016-20 (MSP, \$mn)*

*Chart: USA leading immunity vitamin D supplements 2020 (MSP, \$mn)*

CRN launches Vitamin D & Me!

### AquaDetrim and Detrimax dominate Russia via high-profile A+P (2 pages)

*Chart: Russia vitamin D supplements sales 2016-20 (MSP, \$mn)*

*Chart: Russia immunity vitamin D supplements sales 2016-20 (MSP, \$mn)*

*Chart: Russia leading immunity vitamin D supplements 2020 (MSP, \$mn)*

### Covid-19 pandemic boosts struggling Canadian vitamin D market (2 pages)

*Chart: Canada vitamin D supplements sales 2016-20 (MSP, \$mn)*

*Chart: Canada immunity vitamin D supplements sales 2016-20 (MSP, \$mn)*

*Chart: Canada leading immunity vitamin D supplements 2020 (MSP, \$mn)*

### Italy a star performer in immunity vitamin D (2 pages)

*Chart: Italy vitamin D supplements sales 2016-20 (MSP, \$mn)*

*Chart: Italy immunity vitamin D supplements sales 2016-20 (MSP, \$mn)*

*Chart: Italy leading immunity vitamin D supplements 2020 (MSP, \$mn)*

### Vitabiotics capitalises on immunity trend in UK during pandemic (2 pages)

*Chart: UK vitamin D supplements sales 2016-20 (MSP, \$mn)*

*Chart: UK immunity vitamin D supplements sales 2016-20 (MSP, \$mn)*

*Chart: UK leading immunity vitamin D supplements 2020 (MSP, \$mn)*

### Growing competition in France's immunity vitamin D market (2 pages)

*Chart: France vitamin D supplements sales 2016-20 (MSP, \$mn)*

*Chart: France immunity vitamin D supplements sales 2016-20 (MSP, \$mn)*

Consumer concerns over immunity inspire high-profile A+P in Brazil (2 pages)

*Chart: Brazil vitamin D supplements sales 2016-20 (MSP, \$mn)*

*Chart: Brazil immunity vitamin D supplements sales 2016-20 (MSP, \$mn)*

*Chart: Brazil leading immunity vitamin D supplements 2020 (MSP, \$mn)*

Segment has strong potential globally; underdeveloped in Asia-Pacific (1 page)

Short-term forecast

*Chart: Global immunity vitamin D supplements 5 & 10 year forecast sales 2025 & 2030 (MSP, \$mn)*

## **Zinc (14 pages)**

Global sales spike in 2020 (2 pages)

*Chart: Global zinc supplements sales 2016-20 (MSP, \$mn)*

*Chart: Leading zinc supplements markets 2020 (MSP, \$mn)*

*Chart: Global immunity zinc supplements share 2020 (MSP, \$mn)*

*Chart: Global immunity zinc supplements sales 2016-20 (MSP, \$mn)*

*Chart: Leading immunity zinc supplements markets 2020 (MSP, \$mn)*

Longline ranges dominate global immunity zinc rankings (1 page)

*Chart: Global leading immunity zinc supplements 2020 (MSP, \$mn)*

USA sees sales rocket in 2020 thanks to immunity link (2 pages)

*Chart: USA zinc supplements sales 2016-20 (MSP, \$mn)*

*Chart: USA leading immunity zinc supplements 2020 (MSP, \$mn)*

Zicam acquisition paves way for potential future NPD (1 page)

Zicam acquisition offers Church & Dwight potential opportunity to launch branded zinc range

Germany's zinc sales boosted by high-dosage formats (3 pages)

*Chart: Germany zinc supplements sales 2016-20 (MSP, \$mn)*

*Chart: Germany leading immunity zinc supplements 2020 (MSP, \$mn)*

In Japan zinc's immunity benefits compete alongside beauty and energy (2 pages)

*Chart: Japan zinc supplements sales 2016-20 (MSP, \$mn)*

*Chart: Japan immunity zinc supplements sales 2016-20 (MSP, \$mn)*

*Chart: Japan leading immunity zinc supplements 2020 (MSP, \$mn)*

Brazil benefits from high awareness for zinc supplementation in children (1 page)

*Chart: Brazil immunity zinc supplements sales 2016-20 (MSP, \$mn)*

In Russia longline range Solgar dominates sales (1 page)

*Chart: Russia zinc supplements sales 2016-20 (MSP, \$mn)*

*Chart: Russia immunity zinc supplements sales 2016-20 (MSP, \$mn)*

Raised awareness of zinc's immunity properties drives future sales (1 page)

*Chart: Global immunity zinc supplements 5 & 10 year forecast sales 2025 & 2030 (MSP, \$mn)*

Short-term forecast

## **Probiotics (31 pages)**

Immunity a bright spot in a slowing category (2 pages)

*Chart: Global probiotics sales 2016-20 (MSP, \$mn)*

*Chart: Leading probiotics markets 2020 (MSP, \$mn)*

*Chart: Global immunity probiotics share 2020 (MSP, \$mn)*

*Chart: Global immunity probiotics sales 2016-20 (MSP, \$mn)*

*Chart: Leading immunity probiotics markets 2020 (MSP, \$mn)*

Probiotics for immunity (1 page)

The role of probiotics in immunity

USA probiotics driven by food & drink launches (6 pages)

*Chart: USA probiotics sales 2016-20 (MSP, \$mn)*

*Chart: USA immunity probiotics sales 2016-20 (MSP, \$mn)*

*Chart: USA leading immunity probiotics 2020 (MSP, \$mn)*

US probiotics market is divided when it comes to immunity

China's probiotics category dominated by infant health (3 pages)

*Chart: China probiotics sales 2016-20 (MSP, \$mn)*

*Chart: China immunity probiotics sales 2016-20 (MSP, \$mn)*

*Chart: China leading immunity probiotics 2020 (MSP, \$mn)*

Immunity segment growing in Chinese probiotics

Australian immune probiotics dominated by longline brands (4 pages)

*Chart: Australia probiotics sales 2016-20 (MSP, \$mn)*

*Chart: Australia immunity probiotics sales 2016-20 (MSP, \$mn)*

*Chart: Australia leading immunity probiotics 2020 (MSP, \$mn)*

Strong potential for Australian probiotics market

Immunity probiotics grew in France ahead of declining topline (3 pages)

*Chart: France probiotics sales 2016-20 (MSP, \$mn)*

*Chart: France immunity probiotics sales 2016-20 (MSP, \$mn)*

*Chart: France leading immunity probiotics 2020 (MSP, \$mn)*

Launch activity a key growth driver for French immune probiotics

Opportunities exist in Germany's probiotics market (3 pages)

*Chart: Germany probiotics sales 2016-20 (MSP, \$mn)*

*Chart: Germany immunity probiotics sales 2016-20 (MSP, \$mn)*

*Chart: Germany leading immunity probiotics 2020 (MSP, \$mn)*

Immunity segment underdeveloped but seeing increased marketer attention

Marketers showing growing interest in Poland's immunity segment (2 pages)

*Chart: Poland probiotics sales 2016-20 (MSP, \$mn)*

*Chart: Poland immunity probiotics sales 2016-20 (MSP, \$mn)*

*Chart: Poland leading immunity probiotics 2020 (MSP, \$mn)*

Support for immunity probiotics increasing, but category still relatively minor

Mixed performances in Italy's immunity segment (2 pages)

*Chart: Italy probiotics sales 2016-20 (MSP, \$mn)*

*Chart: Italy immunity probiotics sales 2016-20 (MSP, \$mn)*

*Chart: Italy leading immunity probiotics 2020 (MSP, \$mn)*

India an emerging force in probiotics (1 page)

India an emerging player in immunity probiotics

South Korea seeing high levels of probiotics NPD (1 page)

South Korea's probiotics market expanding rapidly

High levels of NPD expanding segment into new markets (2 pages)

Growing interest in immunity probiotic launches

Key 2020 launches

Key 2021 launches

Outlook is bright for immunity segment (1 page)

*Chart: Global immunity probiotics 5 & 10 year forecast sales 2025 & 2030 (MSP, \$mn)*

Short-term forecast

## **Multivitamins (9 pages)**

Greater consumer focus on wellness and protection boosts sales (1 page)

*Chart: Global immunity multivitamins sales 2016-20 (MSP, \$mn)*

*Chart: Leading immunity multivitamins markets 2020 (MSP, \$mn)*

Sales see big leap in USA (while China growth steady) (1 page)

High zinc content key in India (1 page)

High level of immune-focused A+P in Brazil (1 page)

UK sees strong growth, while daigou downturn affects Australia (1 page)

Varying performances in Russia, Germany and France (1 page)



Centrum expanding into immune health (2 pages)

*Chart: Centrum immunity multivitamins sales 2016-20 (MSP, \$mn)*

*Chart: Centrum leading immunity multivitamin markets 2020 (MSP, \$mn)*

Key learnings

Immune-focused products forecast to maintain highs (1 page)

*Chart: Global immunity multivitamins 5 & 10 year forecast sales 2025 & 2030 (MSP, \$mn)*

Short-term forecast

## **OTC tonic drinks (6 pages)**

Immunity a new niche in historically static category (1 page)

*Chart: Global OTC tonic drinks sales 2016-20 (MSP, \$mn)*

*Chart: Leading OTC tonic drinks markets 2020 (MSP, \$mn)*

Japanese marketers look to new niches (3 pages)

*Chart: Japan OTC tonic drinks sales 2016-20 (MSP, \$mn)*

*Chart: Japan leading OTC tonic drinks 2020 (MSP, \$mn)*

Tonic drinks category is primed for expansion into immunity segment

Overseas presence limited but expanding (1 page)

Spotlight on Taiwan

Immunity may have only limited long term impact on topline (1 page)

*Chart: Global OTC tonic drinks 5 & 10 year forecast sales 2025 & 2030 (MSP, \$mn)*

Short-term forecast

## **Chyawanprash (6 pages)**

Covid-19 drove demand, leading to record 2020 category sales (1 page)

*Chart: Global chyawanprash sales 2016-20 (MSP, \$mn)*

*Chart: Global leading chyawanprash brands 2020 (MSP, \$mn)*

Dabur comprehensive immunity range the biggest winner (1 page)

Covid-19 claim and adjusted strategy boosted sales for Dabur (1 page)

Key findings of Dabur Chyawanprash Covid-19 clinical study (1 page)

Baidyamath's comprehensive formulation a key selling point (1 page)

Zandu focuses on sugar-free remedies to boost sales (1 page)

Outlook: Increased competition within the category expected

## **Antivirals** (8 pages)

### Brands benefit from Covid-driven move towards prevention (1 page)

Limited category with only handful of markets fielding OTC antivirals  
Antivirals for prevention of cold & flu as well as treatment

### Russian cold & flu market features several antivirals (2 pages)

Russia is most prominent market for OTC antivirals, all boosted by Covid  
*Chart: Russia leading systemic cold & flu brands 2020 (MSP, \$mn)*

### Arbidol revived by Covid trends, although claims scrutinized (1 page)

Russia's No.1 cold & flu brand enjoyed stellar growth  
*Chart: Arbidol sales 2016-20 (MSP, \$mn)*

### Poland's inosine pranobex segment sees growth and activity (1 page)

Poland antivirals led by dynamic inosine brands  
*Chart: Poland leading systemic cold & flu brands 2020 (MSP, \$mn)*

### Limited availability in other markets (1 page)

New Zealand first country to switch Tamiflu, with US switch expected soon

### Limited NPD includes new antiviral nasal sprays (2 pages)

Launch activity focused on antiviral sprays

## **Oral & nasal sanitisers** (5 pages)

### Vicks First Defence most established brand (1 page)

Established brands and new entrants fight for consumer attention

### ColdZyme expanding internationally (1 page)

*Chart: ColdZyme sales 2016-20 (MSP, \$mn)*  
*Chart: ColdZyme leading markets 2020 (MSP, \$mn)*

### Otrivin Breathe Clean expands segment (1 page)

### Roundup of other launches (2 pages)

## **CCA brands targeting immunity** (4 pages)

### Sore throat remedies adding vitamin C (1 page)

Marketers of cough, cold & flu treatments expanding into prevention positionings

### Natural & traditional remedies benefit (1 page)

Natural cough remedies targeting immunity (1 page)

Zarbee's targets immune health (1 page)

Zarbee's successfully extended its honey-based cough & cold brand into immunity

## **Antiseptics & disinfectants (13 pages)**

Immunity-adjacent category grows rapidly (1 page)

*Chart: Global antiseptics & disinfectants sales 2016-20 (MSP, \$mn)*

*Chart: Leading antiseptics & disinfectants markets 2020 (MSP, \$mn)*

Safety a focus for US FDA (1 page)

Antiseptics & disinfectants see high levels of launch activity 2020-21

Leading brands growing rapidly across the board (1 page)

*Chart: Global leading antiseptics & disinfectants 2020 (MSP, \$mn)*

Spotlight on USA (1 page)

*Chart: USA antiseptics & disinfectants sales 2016-20 (MSP, \$mn)*

Spotlight on China (1 page)

*Chart: China antiseptics & disinfectants sales 2016-20 (MSP, \$mn)*

Spotlight on India (1 page)

*Chart: India antiseptics & disinfectants sales 2016-20 (MSP, \$mn)*

Spotlight on France (1 page)

*Chart: France antiseptics & disinfectants sales 2016-20 (MSP, \$mn)*

Spotlight on Japan (1 page)

*Chart: Japan antiseptics & disinfectants sales 2016-20 (MSP, \$mn)*

Dettol builds strong reputation during pandemic (3 pages)

*Chart: Dettol antiseptics & disinfectants sales 2016-20 (MSP, \$mn)*

*Chart: Dettol leading markets 2020 (MSP, \$mn)*

Key learnings

Germ-X benefits from simple USP (1 page)

*Chart: Germ-X antiseptics & disinfectants sales 2016-20 (MSP, \$mn)*

Changing habits will drive sustained sales (1 page)

*Chart: Global antiseptics & disinfectants 5 & 10 year forecast sales 2025 & 2030 (MSP, \$mn)*

Short-term forecast

## **Foods & beverages** (5 pages)

### Brands for immunity seeing rapid expansion (5 pages)

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

Consumer scepticism amid claims crackdown

Conclusion: With the right proposition, immune-supporting food & drink could be a trend for many years

## **Inner defence** (5 pages)

### Supplement marketers moving into new niches (2 pages)

Case study: Nourished Inner Defence

### Plant People: Innovative VMS marketer making strides in immunity (2 pages)

### Launches expand immune supplement positionings (1 page)

## **CBD for immunity** (3 pages)

### Marketers looking to capitalise on CBD's popularity (3 pages)

## **Immunity for active consumers** (6 pages)

### A new niche for immunity (3 pages)

Case study: Connual G

### Fast&Up: Indian sports nutrition specialist competes in immunity (1 page)

### Vega: Sports supplement player expands into "Immune support nutrition" (1 page)

### Looking forward (1 page)

## **Personalised immunity** (12 pages)

### Is personalisation "the next frontier" in immunity? (1 page)

### Nestlé a key player via Persona acquisition (2 pages)

### DSM launches vitamin D brand with digital support (2 pages)

### Bayer invests in personalised VMS and immune testing (2 pages)

Nourished offers personalised gummy stacks (1 page)

Amway works with HEM on personalised probiotics (1 page)

Thorne premium VMS line moves into testing (2 pages)

Viome offers custom-made VMS based on samples (1 page)

## **Regimen (6 pages)**

Underdeveloped concept with potential in immunity (2 pages)

Significant opportunity for supplements tailored to stages of immunity  
Defining immunity regimens

Ultra Immune a pioneer in immunity regimen (2 pages)

A variation on the concept: combination SKU launches on the rise (2 pages)

Looking forward – the opportunity of regimen for immunity

## **Direct selling (17 pages)**

MLM sales channel offers consumers the personal touch (1 page)

Direct selling (or multi-level marketing) – a powerful direct-to-consumer channel in the self-care industry

Leading MLM brands globally posting strong growth (1 page)

*Chart: Global leading direct sales VMS brands 2020 (MSP, \$mn)*

Nutrilite: Solid market leader with long market presence (1 page)

*Chart: Nutrilite VMS sales 2016-20 (MSP, \$mn)*

*Chart: Nutrilite VMS sales by major region 2020 (MSP, \$mn)*

Nutrilite: New launches in the immunity space (2 pages)

Nutrilite: Product bundles & discounts help drive immunity sales (1 page)

Key learnings

Herbalife Nutrition: R&D investment drives growth for brand (1 page)

*Chart: Herbalife Nutrition VMS sales 2016-20 (MSP, \$mn)*

*Chart: Herbalife Nutrition VMS sales by major region 2020 (MSP, \$mn)*

Herbalife Nutrition: Use of branded ingredient Epicor offers edge (1 page)

Herbalife Nutrition: All-round immunity health solutions bundle (1 page)

USANA: Young company focused on cellular nutrition (1 page)

*Chart: USANA VMS sales 2016-20 (MSP, \$mn)*

*Chart: USANA VMS sales by major region 2020 (MSP, \$mn)*

USANA: InCelligence Complex offers unique selling point over rival brands (1 page)

InCelligence Complex – key technology driving the USANA brand

USANA: Immunity health range justifies premium pricing with unique blends (1 page)

Immune health launches in MLM beyond the top players (5 pages)

## **Outlook** (8 pages)

How sustainable is the rise in products for immunity? (2 pages)

Will Covid-19 impact consumer behaviour in the long term?

VMS immunity market to flatten in short term before rallying (5 pages)

*Chart: Global VMS Immunity market 5 & 10 year forecast sales 2025 & 2030 (MSP, \$mn)*

Short-term forecast

Most categories in VMS Immunity market will see moderate growth in the long term

*Chart: VMS Immunity market forecast 2025 & 2030 by category (MSP, \$mn)*

Four concluding thoughts on the future of immunity (1 page)

4 concluding thoughts on the future of Immunity