

Table of Contents

Overview	11	Italy boosted by NPD as pandemic stimulates demand	39
How immunity became one of the hottest trends in healthcare	11	Germany sees limited gains, then signs of downturn	41
The shift from prevention to treatment	12	Russia sees huge pandemic-led jump in 2020 sales	43
The existing CHC market for immunity	13	Canada experiences strong demand for echinacea	45
Assessing the size of the immunity market	15	Poland growth sluggish as consumers seek alternatives	47
A major flu revival imminent?	17	Mexico benefits from strong showing for Aderogyl	49
Consumer attitudes to immunity	19	France sales flat as consumers look to vitamin D	50
Prevention a growing priority	19	Australia sees high demand prompt launch activity	51
Surveys reveal consumer insights	20	Brazil sees new market spring up in shadow of Covid	53
Recap of key survey findings	22	Few new ingredient launches to expand the category	55
Immune supplements	23	Previous dynamism unsustainable but sales remain high	56
Thriving category sees record 2020 sales	23	Vitamin C	57
Further bolstered by dramatic upturn in launch activity	24	Covid-19 pandemic brings big rise in immunity sales	57
Leading brands grew rapidly across the board	25	Immunity links well established, but is it beneficial for Covid-19?	59
USA driven by high launch activity and A+P investment	26	Standalone vitamin C brands Emergen-C and Redoxon lead globally	61
Airborne consolidates its No.1 US ranking	31	Covid-19 sees US sales break \$1bn	62
Elderberry-based Sambucol continues formidable rise	33	Emergen-C established as the US vitamin C brand for immunity	65
Indonesia benefits from launches and educational A+P	36		

Table of Contents

Demand for vitamin C in China rises over immunity concerns	67	Covid-19 pandemic boosts struggling Canadian vitamin D market	92
Sales almost double in Brazil as consumers seek immune protection	69	Italy a star performer in immunity vitamin D	94
Redoxon boosted by “triple action” claims	71	Vitabiotics capitalises on immunity trend in UK during pandemic	96
High levels of immunity-focused A+P in Poland	72	Growing competition in France’s immunity vitamin D market	98
Immunity concerns provide big sales boost in Germany	74	Consumer concerns over immunity inspire high-profile A+P in Brazil	
Launches and A+P in Australia as marketers seek to meet demand	75	Segment has strong potential globally; underdeveloped in Asia-Pacific	102
Sales rocket in Italy thanks to pandemic demand	77	Zinc	103
Beauty with immunity to be an expanding niche?	78	Global sales spike in 2020	103
High vitamin C sales brought about by pandemic demand here to stay?	79	Longline ranges dominate global immunity zinc rankings	105
Vitamin D	80	USA sees sales rocket in 2020 thanks to immunity link	106
Global sales spike in 2020	80	Zicam acquisition paves way for potential future NPD	108
Studies into immune benefits of vitamin D accelerating	82	Germany’s zinc sales boosted by high-dosage formats	109
Longline ranges dominate global immunity vitamin D rankings	85	In Japan zinc’s immunity benefits compete alongside beauty and energy	112
US vitamin D sales rocket in 2020 thanks to immunity link	86	Brazil benefits from high awareness for zinc supplementation in children	114
AquaDetrim and Detrimax dominate Russia via high-profile A+P	90		

Table of Contents

In Russia longline range Solgar dominates sales	115	Multivitamins	148
Raised awareness of zinc's immunity properties drives future sales	116	Greater consumer focus on wellness and protection boosts sales	148
Probiotics	117	Sales see big leap in USA (while China growth steady)	149
Immunity a bright spot in a slowing category	117	High zinc content key in India	150
Probiotics for immunity	119	High level of immune-focused A+P in Brazil	151
USA probiotics driven by food & drink launches	120	UK sees strong growth, while daigou downturn affects Australia	152
China's probiotics category dominated by infant health	126	Varying performances in Russia, Germany and France	153
Australian immune probiotics dominated by longline brands	129	Centrum expanding into immune health	154
Immunity probiotics grew in France ahead of declining topline	133	Immune-focused products forecast to maintain highs	156
Opportunities exist in Germany's probiotics market	136	OTC tonic drinks	157
Marketers showing growing interest in Poland's immunity segment	139	Immunity a new niche in historically static category	157
Mixed performances in Italy's immunity segment	141	Japanese marketers look to new niches	158
India an emerging force in probiotics	143	Overseas presence limited but expanding	161
South Korea seeing high levels of probiotics NPD	144	Immunity may have only limited long term impact on topline	162
High levels of NPD expanding segment into new markets	145	Chyawanprash	163
Outlook is bright for immunity segment	147	Covid-19 drove demand, leading to record 2020 category sales	163

Table of Contents

Dabur comprehensive immunity range the biggest winner	164	Oral & nasal sanitisers	177
Covid-19 claim and adjusted strategy boosted sales for Dabur	165	Vicks First Defence most established brand	177
Key findings of Dabur Chyawanprash Covid-19 clinical study	166	ColdZyme expanding internationally	178
Baidyamath's comprehensive formulation a key selling point	167	Otrivin Breathe Clean expands segment	179
Zandu focuses on sugar-free remedies to boost sales	168	Roundup of other launches	180
Antivirals	169	CCA brands targeting immunity	182
Brands benefit from Covid-driven move towards prevention	169	Sore throat remedies adding vitamin C	182
Russian cold & flu market features several antivirals	170	Natural & traditional remedies benefit	183
Arbidol revived by Covid trends, although claims scrutinised	172	Natural cough remedies targeting immunity	184
Poland's inosine pranobex segment sees growth and activity	173	Zarbee's targets immune health	185
Limited availability in other markets	174	Antiseptics & disinfectants	186
Limited NPD includes new antiviral nasal sprays	175	Immunity-adjacent category grows rapidly	186
		Safety a focus for US FDA	187
		Leading brands growing rapidly across the board	188
		Spotlight on USA	189
		Spotlight on China	190
		Spotlight on India	191
		Spotlight on France	192
		Spotlight on Japan	193

Table of Contents

Dettol builds strong reputation during pandemic	194	Personalised immunity	218
Germ-X benefits from simple USP	197	Is personalisation “the next frontier” in immunity?	218
Changing habits will drive sustained sales	198	Nestlé a key player via Persona acquisition	219
Foods & beverages	199	DSM launches vitamin D brand with digital support	221
Brands for immunity seeing rapid expansion	199	Bayer invests in personalised VMS and immune testing	223
Inner defence	204	Nourished offers personalised gummy stacks	225
Supplement marketers moving into new niches	204	Amway works with HEM on personalised probiotics	226
Plant People: Innovative VMS marketer making strides in immunity	206	Thorne premium VMS line moves into testing	227
Launches expand immune supplement positionings	208	Viome offers custom-made VMS based on samples	229
CBD for immunity	209	Regimen	230
Marketers looking to capitalise on CBD’s popularity	209	Underdeveloped concept with potential in immunity	230
Immunity for active consumers	212	Ultra Immune a pioneer in immunity regimen	232
A new niche for immunity	212	A variation on the concept: combination SKU launches on the rise	234
Fast&Up: Indian sports nutrition specialist competes in immunity	215		
Vega: Sports supplement player expands into “Immune support nutrition”	216		
Looking forward	217		

Table of Contents

Direct selling	236	Outlook	253
MLM sales channel offers consumers the personal touch	236	How sustainable is the rise in products for immunity?	253
Leading MLM brands globally posting strong growth	237	VMS immunity market to flatten in short term before rallying	255
Nutrilite	238	Four concluding thoughts on the future of immunity	260
Solid market leader with long market presence	238		
New launches in the immunity space	239		
Product bundles & discounts help drive immunity sales	241		
Herbalife Nutrition	242		
R&D investment drives growth for brand	242		
Use of branded ingredient Epicor offers edge	243		
All-round immunity health solutions bundle	244		
USANA	245		
Young company focused on cellular nutrition	245		
InCelligence Complex offers unique selling point over rival brands	246		
Immunity health range justifies premium pricing with unique blends	247		
Immune health launches in MLM beyond the top players	248		