



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

Pricing

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Immunity

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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
- ✗ This may be countered to a degree by improved hygiene practices, with mask-wearing, social distancing, washing hands, etc. helping suppress the spread of viruses



- 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 risk of 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 June, 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 reluctant 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



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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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