



Getting Ahead of the Curve: Immunity in the 'New Normal'

A surge in sales during the COVID-19 outbreak provides a good indication of what supplement consumers prioritize for optimizing their health.

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The COVID-19 crisis has made consumers around the world increasingly aware of the critical role a strong immune system can play in health maintenance and disease prevention—and they're taking action.

Moreover, fears of possible additional outbreaks, either in the fall or from returning to normal behaviors too soon, have created a new need for preparedness, which is likely to be the new normal—and a very big business opportunity going forward.

For the year ended (Y/E) Mar. 22, 2020, U.S. total mass multi-outlet (MULO) and convenience store dollar sales of immunity products jumped 199%, vitamins 77%, and gastrointestinal products (which include probiotics) 30%, per IRI's Apr. 4 COVID-19: Economy Report. The number of immunity product buyers in the U.S. increased by 125%; vitamin supplement buyers by 27%.

In the U.K., vitamin supplement sales increased 118% for the year ending Mar.

15, 2020; 212% in New Zealand, per IRI's Mar. 26 COVID-19 Impact Report. The opportunity for the nutraceutical industry is to keep these new immune product buyers long-term.

Off the Back Burner

Some major nutrition sales tracking firms have reported that combined cold/flu/immunity supplement category sales have shown increasingly strong single-digit sales growth over the past three years, fueled by previous cold/flu seasons. However, the number of U.S. supplement users who had taken an immunity supplement has remained essentially flat for the past five years.

According to the 2019 CRN Survey on Dietary Supplements, 27% of supplement users took a supplement for immune health last year vs. 26% in 2018, 24% in 2017, 23% in 2016, and 27% in 2015. Immunity was the third most popular reason for taking a supplement last year

behind overall health/wellness (cited by 40%), and energy (cited by 31%).

In 2019, a weak/stressed immune system ranked 19th among health concerns Americans were extremely/very concerned about, per HealthFocus' 2019 USA Trend Study (see Figure 1). Immunity is seventh among health concerns mothers are extremely/very concerned about for their children, ranking behind their appearance including skin, hair, and teeth.

Building resistance to common ailments (e.g., cough, colds) ranked ninth among the most desired functional food benefits in the U.S. last year; boosting the immune

This article in a nutshell:

- Off the Back Burner
- Taking Control of their Health
- Immune Supplements
- Demo Memos
- Functional Foods
- Personal & Peripheral Products

system ranked 11th—each was cited by just over 30% of adults, per HealthFocus.

Mintel's Functional Ingredients in Food and Drink – US, Dec. 2019 reported that only 17% were currently eating/drinking a food product that claimed to provide immunity; 29% said they enjoy new/trendy healthy fare (see Figure 2).

Most important, globally, the absence of disease fell to fourth place among the criteria consumers in Euromonitor's 2019 Health & Nutrition survey use to define being "healthy," behind mental well-being, "feeling good," and "getting enough sleep" (see Figure 3).

Taking Control of Their Health

The pandemic has also driven the self-care movement further mainstream. According to IRI's 2020 Harnessing the Power of Self Care report, going forward, preventive products will likely trend higher than those that target symptoms.

Moreover, the diversity of consumer self-care behaviors will energize new companion market segments and multi-functional products for immune health; including hydration, sleep, calming/anxiety, and more (see Figure 4).

For example, an immune benefit claim added to a weight or general wellness claim on meal replacements, weight loss, or nutritional drinks would motivate two-thirds of consumers to buy the product. These three categories are currently the top reasons for purchase, according to Mintel's Nutrition Drinks – US – Feb. 2020, and TURF analysis (see Figure 5).

Perhaps most important, according to the Hartman Group's March 2020 podcast, "The Coronavirus Crisis: How the Core Wellness Consumer Thinks About Immunity Through Proactive Resilience," trend-setting core health/wellness consumers have based their immunity preparedness efforts on managing stress and inflammation, getting adequate rest/sleep, and eating a proactive diet.

They seek to avoid sugar/carbohydrates, and eat more omega-3 rich oils

FIGURE 1: Health Concerns U.S. Consumers are Extremely/Very Concerned About

Top 20 Health Concerns	Total
Retaining mental sharpness as I age	60%
Maintainng ability to contine with my normal activities as I age	59%
Memory	55%
Vision	55%
Tiredness/lack of energy	52%
Dental health	51%
Bone health/strength	51%
Cardiovascular/heart disease	49%
Stress	49%
Reduced physical activity levels due to health	48%
Muscle health/muscle tone	48%
Back or neck pain	47%
Digestive health/gut health	47%
Arthritis	46%
Cancer	46%
Skin health	46%
Lack of mental sharpness or focus	45%
Sleep problems	45%
Weak/stressed immune system	45%
Eye health (dry eye, etc.)	44%

Source: HealthFocus USA Trends Survey, 2019

(fewer omega-6 oils), fresh vegetables, garlic, onion, ginger, cinnamon, raw honey, and functional mushrooms. Vitamin C, vitamin D, and probiotics are the main supplements they choose; followed to a lesser degree by selenium, and elderberry. Core advocates also report use of licorice for respiratory health, chaga, and adaptogens.

Immune Supplements

Sales spurts during the COVID-19 outbreak provide a good indication of what supplements consumers overall prioritize for optimizing prevention and immune support.

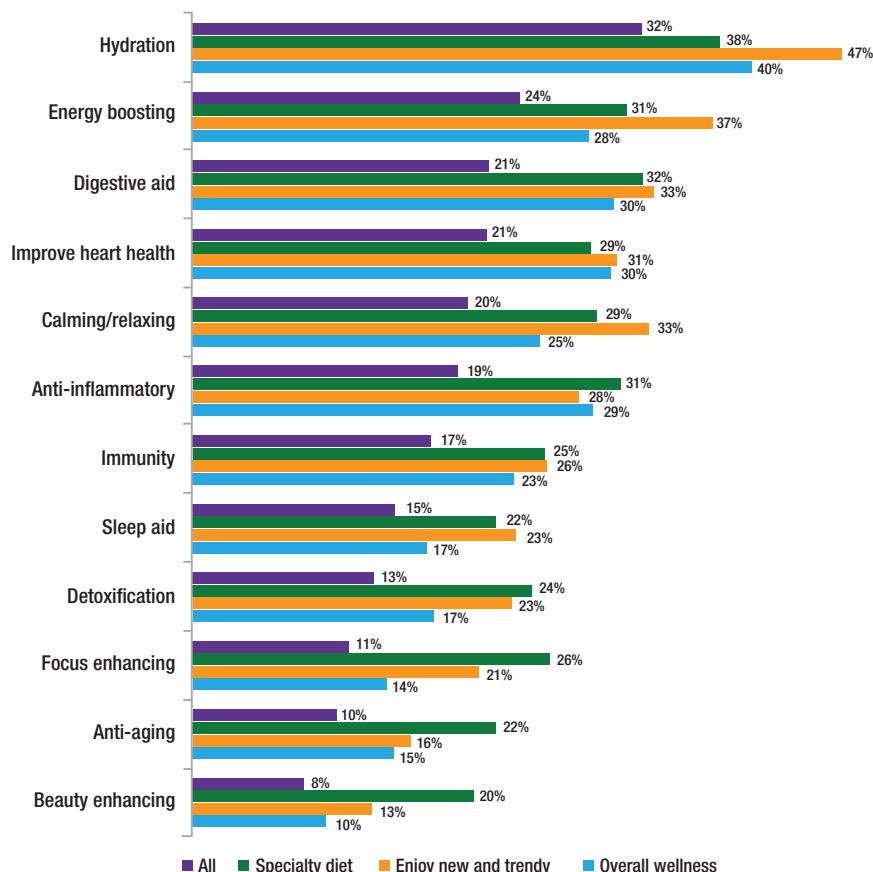
While all mass market MULO supplement sales were up 7.7% for the year ending Mar. 15, 2020, sales during the four-week period ending Mar. 15 jumped 36%, and 88% during the last week. During the four-week period, letter vitamin sales grew 75%, herbals 58%, multi-vitamins 29%, minerals 17%, and specialty supplements 13%.

Coming off the fall/early winter cold/flu season, vitamin C supplements posted dollar growth of 19% for the year ending Mar. 15, but 150% for the four-week COVID-19 period ending on the same date; and 395% for the last week. Vitamin D sales rose 1.3% for the past year, 27% for the four-week COVID period, and 82%

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FIGURE 2: Usage by Functional Benefit

Do you currently eat or drink any products that claim to provide the following benefits?



Source: Mintel Functional Ingredients in Food and Drink – US, Dec. 2019

for the final week; zinc sales rose 24%, 185%, and 437%, respectively.

Elderberry is the new immunity superstar with sales up 193% for the past year, 368% for the four-week COVID period, and 788% for the last week; Echinacea, 11%, 127%, and 344%, respectively, per IRI. MULO sales of probiotics increased 9.2% during the COVID four-week period and 32% during the last week.

In 2019, 40% of users took a vitamin D supplement, 37% vitamin C, 25% B/B-complex vitamins, 19% green tea, 17% probiotics, 16% turmeric, 13% zinc—all among the top 13 most-taken supplements. Six percent took an Echinacea supplement, 4% elderberry,

and 2% ashwagandha, per CRN; adults aged 18-34 were the most likely to do so.

Probiotics, prebiotics, and synbiotics remain one of the most exciting opportunities for immunity. According to Sloan Trends TrendSense model, the immunity-probiotic connection is a highly marketable Level 3 nutraceutical opportunity (see Figure 6). Moreover, medical/scientific research continue to increase steadily, solidifying the rate of scientific evidence and identifying additional new linkages.

Over half (55%) of U.S. consumers associate the microbiome/digestive health with improving immune function. Young adults under age 40 and those in households with kids are most likely to

link immunity to the microbiome/gut health/probiotics, per HealthFocus.

In 2019, 39% were trying to add more probiotics and 24% prebiotics from foods/beverages, per the Hartman Groups' 2019 Health + Wellness. Globally, 30% of consumers said they want to improve their digestive health to boost their natural defenses, according to Kerry's Global Consumer Survey: Digestive & Immune Health 2019.

There is high potential for more resilient spore-forming probiotics which will allow for more diverse applications of immune-boosting probiotics, as well as psychobiotics for reducing stress.

Nature's Bounty offers "controlled delivery" Probiotics CD for digestive, intestinal, and immune health "with a "delayed release system with six probiotic organisms."

Nature's Way's SystemWell Ultimate Immunity offers Multi-system Defense—Cellular, Circulatory, Digestive, Respiratory & Systemic.

Proprietary immune ingredients are increasing in popularity. Natrol's Immune Support, which provides "daily maintenance for immune health," contains Epi-Cor, a fermented immune-boosting yeast complex, which is "clinically tested to improve immune health."

Airborne's Immune Support + Sleep powder packets offer immune support and a sound night's sleep.

P&G's Align delivers Energy + Immunity and contains probiotics and prebiotics. Prior to the coronavirus outbreak, *Nutrition Business Journal* projected that sales of symbiotic supplements would reach \$881 million by 2021.

RenewLife offers Immune Support with the "#1 Doctor Preferred Probiotic Strain for Respiratory Health."

Superfood ingredients that boost immune health remain another popular option. Wederspoon introduced naturally high in antioxidant Manuka Honey Immunity Gummies, featuring 100% RDI for vitamin C and 5 billion CFU of DE111 probiotic per serving; along with selenium and zinc.

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Natural Wellbeing's Immune Sure supplement is based on medicinal mushrooms, herbs, and adaptogens.

Demo Memos

While working adults aged 30-39 and 50-64 and those living in households with children have traditionally been most concerned about immunity, the COVID-19 crisis has ignited interest among the 48 million U.S. adults over age 65, as well as those who are at-risk, or health compromised.

IRI reported that older reactive consumers with health conditions and those who take Rx drugs regularly opted for fruit/vegetable juices, 1-2 letter vitamins, and sleep aids during the pandemic in March 2020.

Culturelle's Pro-Well 3-in-1 Complete probiotic supplement is well poised for today's concerned or compromised older consumer. The product is designed to aid heart health, digestion, and provide natural immune support.

Younger proactive consumers were more likely to choose immune-specific supplements, bottled water, juice, energy drinks, sleep aids, and pediatric internal analgesics if children were in the household, per IRI.

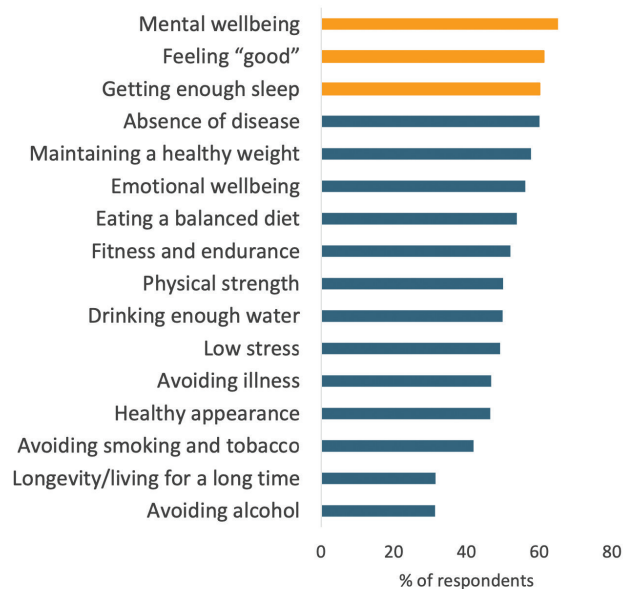
For the year ending Mar. 22, sales of children's supplements rose 6%, 58% for the former four-week period, and 165% during the last week, per IRI. The Centers for Disease Control and Prevention (CDC) reported that, in an average year, adults get two-three colds/respiratory illnesses per year; children three to eight.

The COVID-19 crisis has also ignited renewed interest in immune-boosting infant formula/toddler drinks. Innova Market Insights reported that immune, brain, and bone

health were the most popular claims on new milks/formula introduced globally for children aged six months to three years last year.

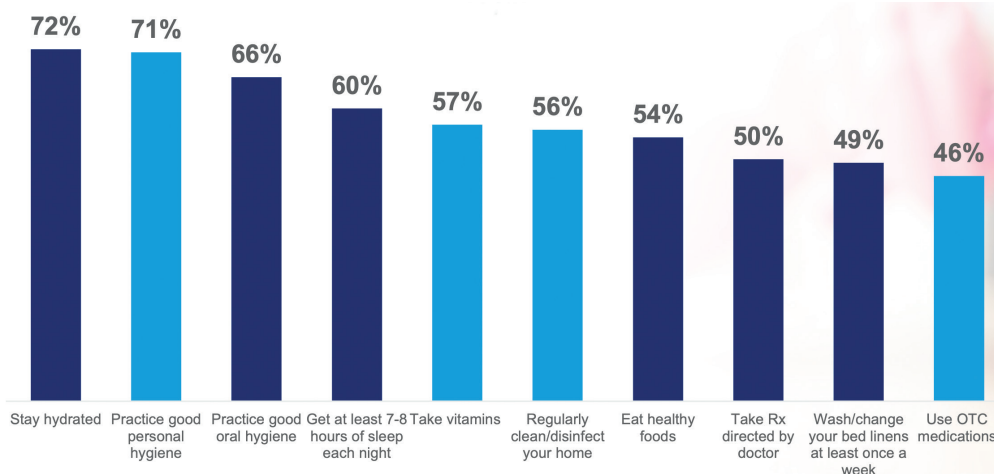
Global infant formula sales are projected by Hexa Market Research to top \$90.5 billion by 2025, with a CAGR of 9.4%. HMOs (human milk oligosaccharides) have been one of the most important developments in infant formula and appear to hold immune-boosting promise for adults.

FIGURE 3: Global Meaning of Being Healthy



Source: Euromonitor, 2019 Health & Nutrition

FIGURE 4: How Do Consumers Practice Self Care?



Q2. Which of the following do you, personally, consider ways to practice self care?
We want to know what you believe is self care, not what your friends, family or society overall may think is self care.

Source: IRI 2020 Harnessing the Power of Self Care to Drive Sustainable Growth

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Lastly, immunity has also been an important quality for sports nutrition products for both serious athletes and today's mainstream "fit consumers" who try to live an active healthy lifestyle—and may represent as much as 40% of U.S. consumers (For more about the Fit Consumer, see Sloan/Hutt, *Getting Ahead of the Curve: The Fit Consumer*, March 2019, *Nutraceuticals World*).

"Fit consumers" look for products high in probiotics (40%) and prebiotics (45%), per FMCG Gurus' 2019 Global Active Nutrition report. Olly offers elderberry and blood orange gummies for "active immunity."

With the Medicare-supported Senior-

Sneakers has taken to the Internet during the pandemic, immune-boosting senior sports nutrition programs will be in vogue.

With "exercise as medicine," "fitness for older adults," and "exercise for lifestyle medicine" ranking sixth, eighth, and 16th, respectively, among the top global sports nutrition trends for 2020, according to the American Academy of Sports Medicine, immune-boosting sports support products will find a welcome market.

Globally, 42% of consumers who drink sports drinks do so for hydration, per Euromonitor's 2019 Health & Nutrition Survey.

Functional Foods

With more consumers now looking for foods with benefits than for passive health positionings, (e.g., organic, clean, or all-natural), per FMI's 2019 U.S. Grocery Shopper Trends, the timing is right for touting immune-boosting components, whether naturally occurring or through fortification.

Euromonitor estimated the global fortified/functional food market at \$267 billion and the naturally healthy segment at \$260 billion in February 2020.

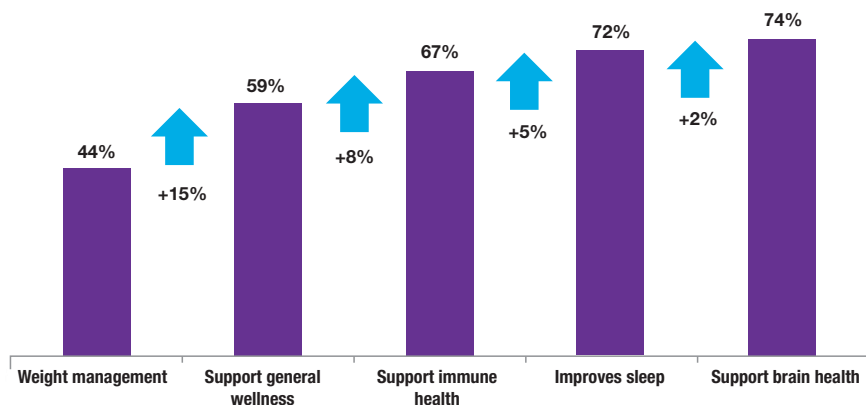
Juices (especially orange), fruit, yogurt, and teas are most often associated by consumers with boosting immunity. Tropicana's Trop50 has three times the amount of vitamin C in orange juice and is fortified with zinc. Ocean Spray's Growing Goodness kids' juices "may help support immune health."

Carnation's Breakfast Essentials Nutritional Drink Mix with Probiotics claims "digestive & immune" support; Stonyfield Organic Daily Probiotics shots are designed to boost immune and digestive health daily.

Yogi offers Echinacea Immune Support tea. Twinings' Support tea "promotes a healthy immune system."

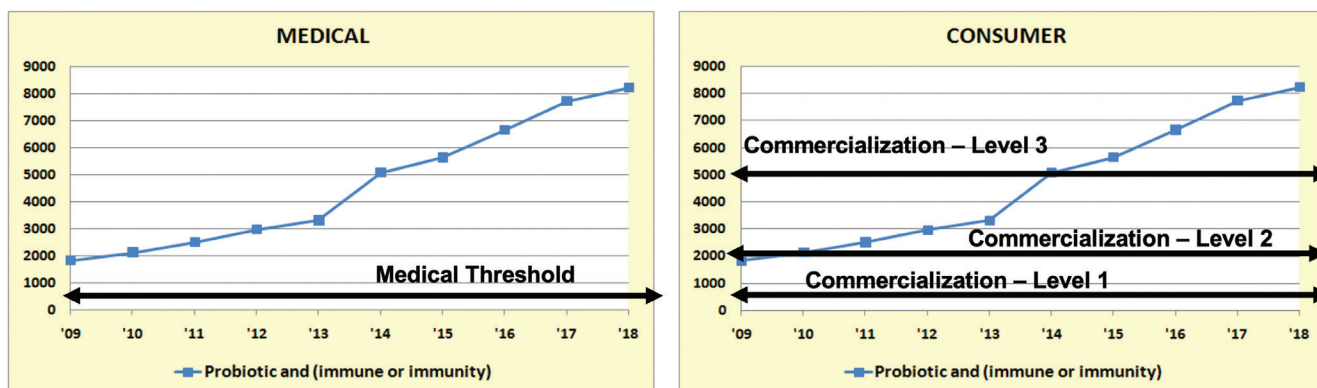
Starbuck's offers three Teavana Wellness teas to boost immunity. Defense Wellness Tea is a blend of white tea, blackberry leaves, and vitamin C. Evolution's cold-pressed fresh juices include Organic Defense Up for a natural immune-boost.

FIGURE 5. Which of the following health benefits would motivate you to purchase a weight loss, nutrition or meal replacement drink?



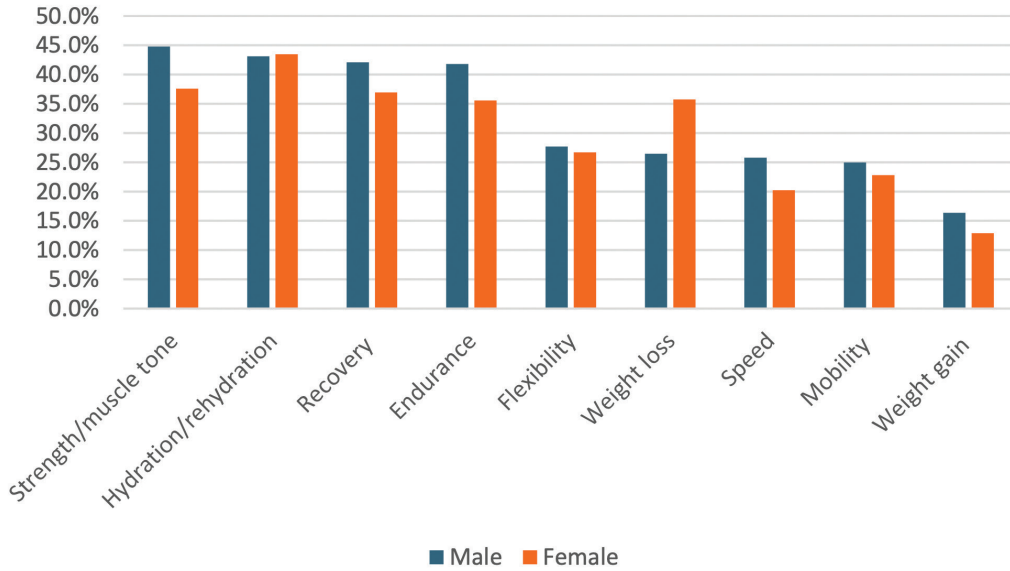
Source: Mintel, *Nutrition Drinks – US – Feb. 2020*

FIGURE 6. TrendSense Predictive Model: Probiotic & Immunity Level 3 Mass Market



Source: Sloan Trends, 2019

FIGURE 7. Reasons for Sports Nutrition Product Use, Global



Source: Euromonitor, Health & Nutrition Survey, 2019

Fermented foods are also getting attention as an immune booster. Fermented foods remained the top trendy superfood for 2020, per Pollock Communications' What's Trending in Nutrition Survey.

Globally, consumers said that breakfast is the mealtime best suited for immune-boosting foods/drinks; 82% in South America, 71% in North America, 68% in Europe, and 64% in Asia, per Kerry's 2019 survey.

Four in 10 also favor immunity claims for mid-morning or afternoon snacks. MyBites Triple Defense Immune Dark Chocolate Bites include vitamin C, zinc, and Echinacea for immune support.

In households with children age 12 and under, globally, there is greater interest in purchasing immune-boosting children's beverages, toddler foods, snacks, dietary supplements, energy, and sports nutrition products, per Kerry.

Sports consumers are most interested in immune-boosting cereal/breakfast bars, per Kerry. Cocommune Bar is a coconut filled, high fiber immunity bar.

Consumers in North America and

Asia are more interested in purchasing immune boosting fruit and vegetable juices, per Kerry; Europe and Asia yogurt/probiotics.

Personal & Peripheral Products

Consumers also realize that sleep, being calm, and minimizing anxiety/stress are extremely important immunity criteria. For example, for the year ending Mar. 22, sales of valerian jumped 19%, 38% for the previous four weeks, and 89% for the past week, per IRI; kava 68%, 29%, and 23%, respectively.

Watch for more immune-boosting personal products (e.g., Swisse Wellness' Immune Support jelly and beauty masks, essential oils, and cosmeceutical skin creams). True Botanicals offers an Immune-boost essential oil.

With hydration currently an in-vogue trend, immune-boosting powders and waters will find a welcome market. One third buy foods/drinks that claim to provide hydration, 38% of those on a special diet, 40% of core wellness consumers, and

47% of those who describe themselves as new and trendy, per Mintel's Functional Ingredients report.

Lastly, of the 50% of U.S. consumers who experimented with an eating plan in 2019, 7% tried a juice cleanse or "detox" program, per Hartman's 2019 Health and Wellness report. One in 10 (13%) of consumers overall consumed a food/beverage which had a detoxification claim/positioning, per Mintel's functional ingredients report (see Figure 2). ^{NW}

About the authors: Dr. A. Elizabeth Sloan and Dr. Catherine Adams Hutt are president and chief scientific and regulatory officer, respectively, of Sloan Trends, Inc., Escondido, CA, a 20-year-old consulting firm that offers trend interpretation/predictions; identifies emerging high potential opportunities; and provides strategic counsel on issues and regulatory claims guidance for food/beverage, supplement and pharmaceutical marketers. For more information: E-mail: lizsloan@sloantrend.com; Website: www.sloantrend.com.