

Immune Support During Coronavirus: How Vitamins and Supplements are Responding

October 2020

Table of Contents

INTRODUCTION

Key findings

Introducing Euromonitor's Immunity Series

HISTORY OF IMMUNITY IN VITAMINS AND DIETARY SUPPLEMENTS

COVID-19 fears generate an unprecedented interest in immunity

What is meant by "immune support" or "immunity-boosting" claims?

Immune system claims: "supporting" over "boosting" immune benefits

Strong link exists between supplements and immunity

History of immunity: strong US growth in established, new ingredients

History of immunity: Asian growth strong in herbal/traditional offerings

Where does immunity play in 2020?

Consumer response to COVID-19 not the same as typical cold and flu

How long will interest in immunity continue?

The state of immunity in 2020-2021

EXAMINING IMMUNITY SEEKERS

Immunity as part of the larger supplement universe

The Immunity Seekers: more urban and more educated

Where are Immunity Seekers likely to be?

Immunity Seekers proliferate among professionals, older aged

Immunity Seekers have a broad conception of health

Immunity Seekers have a positive view on vitamins and supplements

Immunity Seekers are frequent users of vitamins and dietary supplements

Immunity Seekers are heavier users of health tech to support goals

Immunity Seekers: multiple ingredients used for immune support

Some immunity ingredients are universal, but regionalism remains

The state of Immunity Seekers in 2020-2021

THE PATH TO "IMMUNITY PLUS"

Immunity Seekers engage with other supplement benefits as well

"Immunity Plus" pathway #1: general health and mainstreaming

Despite movement to mainstream, vitamins and supplements dominate

"Immunity Plus" as an extension of general heath

Expansion of cough/cold to include immunity

Herbal/traditional ingredients make an immunity push

"Immunity Plus" pathway #2: immunity's link to other conditions

Stress suppresses immune response and is constant in modern societies

Adaptogens moving to incorporate immunity messaging

Sleep is an easy extension for immunity positioning

Strong link between gut health and immunity through probiotics

Probiotics usage by age supports movement towards immunity

Probiotics push to more explicit immunity messaging

The next generation of immunity positioning: Sports nutrition

The next generation of immunity positioning: Weight management

Reintroducing long-standing ingredients around immunity

The state of "Immunity Plus" in 2020-2021

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/immune-support-during-coronavirus-how-vitamins-and-supplements-are-responding/report.