

# Trends in Immune Health Products

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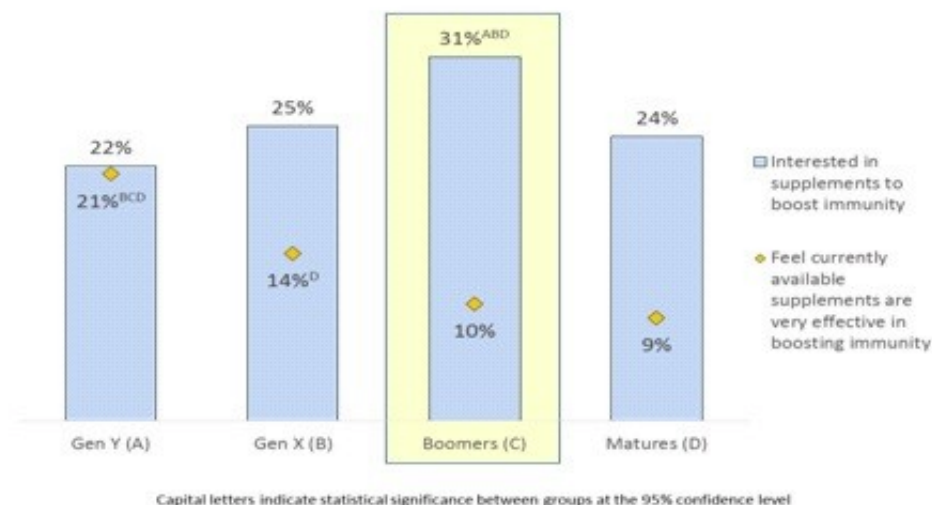
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A healthy immune system is essential for protection from various diseases and conditions, as it is the natural resistance of the human body to infectious microorganisms. Various factors such as stress, aging and environmental toxins contribute to weakened immune systems, facts that resonate with the American population. According to Natural Marketing Institute's (NMI) 2013 Healthy Aging Database®, one-half of U.S. adults claim to be concerned about boosting their immunity at some point in their lives, with a notable spike in concern among those in their 30s. Still, less than 5 percent of the population is actively managing (treating) a compromised immune system, indicating that products designed for prevention will reach a larger share of potential consumers—a trend that has remained stable for the past several years.

## Efficacy of Immunity Products

Consumers have various means by which they can proactively strengthen their immune system, the most common being condition-specific or targeted nutrient supplements and functional foods/beverages. About one-fourth of the U.S. general population—regardless of age, gender, marital status or income—is more likely to purchase a food or beverage if it claims to boost immunity. A similar proportion is interested in nutritional supplements that serve the same purpose, but in this case, the Boomer generation (particularly those ages 50 to 64) is the most captive audience.

While Boomers represent a core market for immune-support supplements, they are relatively dissatisfied, compared to their younger counterparts, with the efficacy of the options currently available to them:



This dissatisfaction with supplements currently available for immune support may be why few Boomers (4 percent) report actually using them in the past 30 days. In fact, Millennial consumers are significantly more likely than all other generational segments to have recently used immunity-boosting supplements, although even their numbers are low (10 percent).

## Beyond Antioxidants

In recent years, a host of products have launched claiming to maintain and/or boost immunity. While the

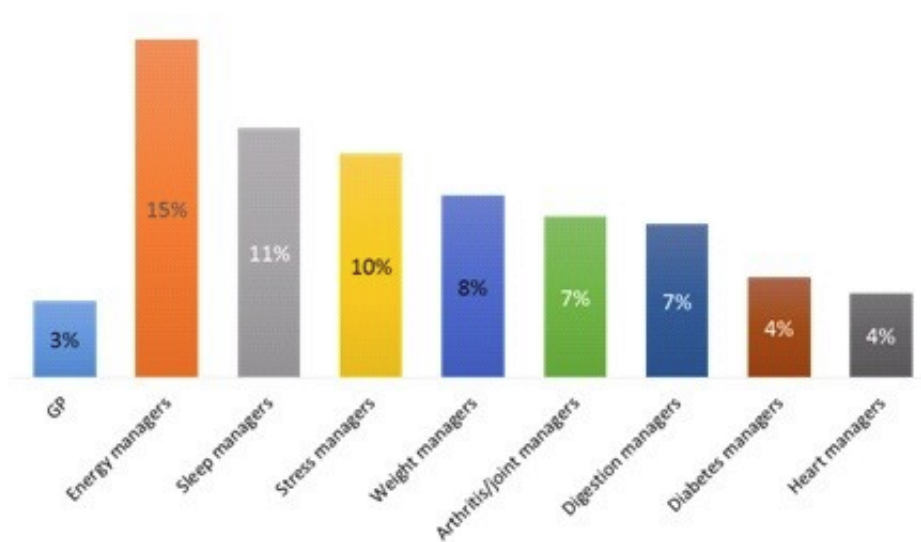
focus continues to be on foods and supplements that are antioxidant-rich, other nutrients such as probiotics and omega-3s are gaining awareness among consumers for immune support properties.

Nutrient	% of General Population Associating Nutrient with Immune Support Benefits	Compound Annual Growth Rate (CAGR) 2008-2012
Antioxidants	44%	+7%
Probiotics	26%	+29%
Superfruits (e.g., acai, goji, mangosteen)	25%	+20%
Omega-3s	25%	+23%
Vitamin D	19%	+20%
Protein	13%	+3%
Whole grains	11%	+10%
Fiber	11%	+24%

Source: NMI's 2012 Health & Wellness Trends Database®

### Cross-Marketing Possibilities

The need to strengthen immunity is tightly linked with other health conditions. Compared to just 3 percent of the total U.S. adult population, those currently managing stress, sleep and energy issues are much more likely to be treating a compromised immune system at the same time. As such, an expanded market exists for manufacturers of foods, beverages and nutritional supplements claiming to strengthen immunity. Of course, the ultimate determinant of success for combination formulas treating immune weakness and other conditions is how well they work.



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