

The Immunity Report 3.0

How to reignite immunity in a post-pandemic world





We bring progress to life



The World Health Organization (WHO) might have declared COVID-19 no longer constitutes a public health emergency, but consumer interest in immunity isn't decreasing. We have, however, identified a shift in focus—a move from short-term measures designed to boost defenses to a greater emphasis on overall health and quality of life as a result of improved immunity.

Within the constantly evolving supplements market, our 2023 Immunity Report reveals consumers' wellness priorities, shares expert insights, and offers actionable advice to enable brands to maintain a competitive edge.

From refining communication strategies to formulating supplements that support specific health needs, we can help you transform research into tangible real-world impact. Stay ahead of the curve by discovering what immunity means in a post-pandemic world and elevate both consumer well-being and your brand's success.



Key Trends

01 Immunity, Plus

Multifunctional supplements present an opportunity to take a holistic approach to health that connects the dots between mind and body.

02 Healthy Aging

Short-term defenses have given way to long-term lifestyle changes as consumers seek to understand immune aging and discover solutions that support well-being in later life.

03 Behind The Label

Knowledge-hungry and keen to take control of their health journey, consumers want to identify the best possible ingredients—for themselves and the planet.

04 Personalization

Supplements must meet consumers' health needs and be convenient, while innovative delivery formats that seamlessly support their lifestyles are key.

Executive Summary

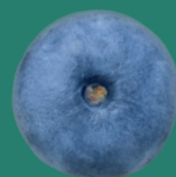
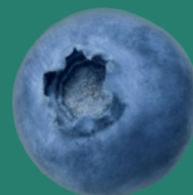
Immunity remains the number one reason consumers take dietary supplements¹.

Consumers have become increasingly aware of the crucial link between immunity and their overall physical and mental well-being. This holistic perspective on health is driving the popularity of multifunctional supplements, while tailored solutions and single-ingredient vitamins have also captured the attention of consumers looking to support different life stages and meet specific nutritional needs. In addition, as consumers seek to ensure lasting health benefits that will accompany them as they age, preventative measures and proactive habits are shaping today's concept of immunity.

Discover the key trends currently influencing immune health and what you can do to support consumers on their journey to optimal well-being in a post-pandemic world.

¹ DSM – Global Consumer Immunity Panel, September 2022

Immunity, Plus








Consumers no longer look at immunity in isolation. Instead, they're interested in supporting a range of physical and mental health factors that—when combined—build the foundation for a robust immune system.



01

Immunity is the number one area consumers plan to address over the next 12 months, and going forward, a strong immune system will increasingly be regarded as something that goes hand in hand with good overall health.

How people defined health in 2022:






-  **65%** mental wellbeing
-  **62%** healthy immune system
-  **59%** getting enough sleep
-  **58%** feeling 'good'
-  **56%** emotional well-being²

²Euromonitor International – Consumer Health in 2022: Priorities, Opportunities and Concerns (https://www.euromonitor.com/article/consumer_health_in_2022_priorities_opportunities_and_concerns)



Top five health areas that consumers plan to address over the next 12 months:



-  **66%** immune health
-  **56%** digestive health
-  **53%** heart health
-  **48%** mental well-being
-  **38%** cognitive health³

Holistic healthcare is here

Consumers are now more aware than ever of the interconnectedness between various aspects of their health, ranging from skincare to sleep hygiene. One area gaining significant attention is gut health, which has become a top priority for many individuals seeking to prevent infections, reduce inflammation, and support overall immune health.

This heightened focus stems from a growing understanding of the vital role played by the gut microbiome, with 79% of global consumers recognizing the direct impact of a poor digestive system on the immune system and vice versa⁴. This strong consumer interest creates an opportunity for brands to leverage emerging science to bring innovative gut health solutions to the dietary supplements market. For example, human milk oligosaccharides (HMOs) are unique, gut-strengthening nutrients that are scientifically proven to support digestive health and immunity.

³FMCG Gurus – Top Ten Trends For 2023, January 2023 (<https://fmcggurus.com/reports/fmcg-gurus-top-ten-trends-for-2023-global-report/>)

⁴FMCG Gurus – Evolving Trends in the Immune Health Market – Global Report, 2022 (<https://fmcggurus.com/reports/fmcg-gurus-evolving-trends-in-the-immune-health-market-global-report-2022/>)

Single supplement, multiple benefits

Multifunctional supplements represent a cost-effective solution during challenging economic times and offer the convenience needed to support busy lifestyles. And by clearly explaining a product's active health claims and the many benefits it provides, brands can win the approval of consumers keen to optimize their overall health.

In Europe, **80%** of consumers value multifunctional claims on food, drink, and supplement products that are positioned around supporting the immune system⁵.

As you evolve your immunity portfolio, we offer support every step of the way—from science and formulations to marketing and regulation, with premix and market-ready solutions that help simplify and achieve speed to market.



⁵FMCG Gurus – Immune Health: Consumer Perceptions in Europe 2022 (<https://fmcggurus.com/blog/immune-health-consumer-perceptions-in-europe-2022/>)

“We have a broad portfolio of core immunity ingredients, including access to best-in-class botanical adaptogens and nootropics, and scientifically proven biotics, to address holistic health and meet desired health outcomes.”

– Martín dos Ramos Farías

Vice President, Global Marketing and Business Development – Dietary Supplements
Health, Nutrition & Care

Healthy Aging



To ensure the best possible quality of life as they get older, consumers are taking preventative measures and adopting proactive health practices.



02

For today's consumers, immunity is about more than fighting pathogens. Therefore, brands should focus on educating and empowering consumers to strengthen their immune systems and support their long-term health goals.

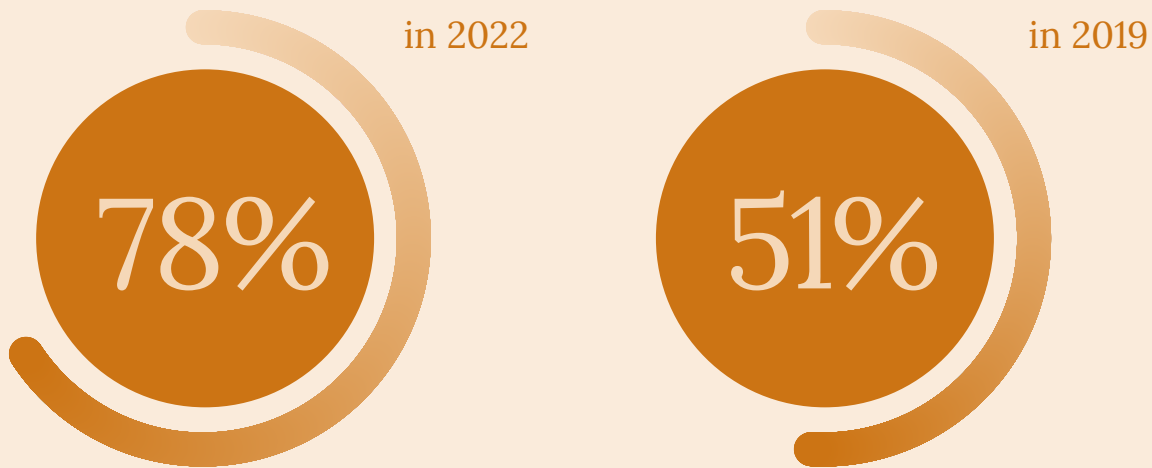
Supporting aging immunity

Aging weakens people's immune response to infections, increasing the risk, severity, and duration of infections, including respiratory infections such as the flu. Older people also tend to have reduced antibody response to vaccinations and are at risk of chronic inflammation—called inflammaging—which can further impair immunity.

As a result, making lifestyle adjustments to support immune health and overall well-being becomes paramount. To counter the effects of immunosenescence—the natural decline of the immune system’s function with age—a growing body of evidence indicates that getting the optimal status of certain nutrients can help.

Our expert review found Vitamins C, D, and E, selenium, and zinc, as well as the omega-3 (n-3) fatty acids DHA and EPA, can help compensate for age-related changes. This is especially important as the intake of certain nutrients among the elderly tends to be low.

% of consumers who associate poor immunity with susceptibility to long-term health problems:



⁶FMCG Gurus – Evolving Trends in the Immune Health Market – Global Report, 2022
(<https://fmcggurus.com/reports/fmcg-gurus-evolving-trends-in-the-immune-health-market-global-report-2022/>)



Promoting quality of life



52% of global consumers are adopting a long-term approach to their health⁷.

Eating a nutritious diet, exercising more regularly, quitting smoking, and cutting back on alcohol—consumers are taking the long view as they look to ensure their future health. It's all about ensuring mobility and physical and mental well-being so they can continue living a full life well into old age. And with more people citing the sustained benefits (74%) of supplements over the instant benefits (69%), prevention and protection are clear priorities going forward.

To support an increasingly health-conscious aging population, brands should align their offerings with consumers' long-term health goals and emphasize the benefits of sustained health management.

⁷FMCG Gurus – Top Ten Trends For 2022, January 2022
(<https://fmcggurus.com/reports/fmcg-gurus-top-ten-trends-for-2022-global-report/>)

“At dsm-firmenich, we’re committed to empowering brands to deliver health-boosting solutions designed to address various aging-related conditions like decreased immunity, chronic inflammation, and reduced mobility.”

– Jane Chen

Global Immunity & Healthy Aging Lead – Dietary Supplements
Health, Nutrition & Care

Behind The Label



Taking an increasingly proactive approach to managing their health, consumers are paying attention to ingredients.



03

With the online world providing a constant source of wellness information, consumers are conscious of what they put in (or on) their bodies and are wary of misinformation. That's why assuring the quality, effectiveness, and sustainability of a supplement is crucial to earning their trust. In addition, consumers are interested in natural ingredients, such as botanical extracts, that they know and trust—53% of supplement users stopped using supplements because they are uncertain of the ingredients the products contain⁸.

⁸FMCG Gurus – Nutritional Supplement Trends in 2023, February 2023

Consumers wear lab coats

Consumers are taking a scientific approach to their health and looking for high-quality ingredients, efficient delivery formats, and effective products, that represent good value.

Brands need to reassure the **55%** of global consumers who are concerned about hidden ingredients in products and the **55%** who believe nutritional information could be simplified⁹.

And with bioavailability fast becoming one of the biggest immunity buzzwords in 2023, purchase decisions are informed by the potency and efficacy of active ingredients. Consumers want to know that what they're taking works and are keen to receive advice on achieving maximum nutrient absorption, like ampli-D[®], which achieves optimal levels of vitamin D three times faster on average than regular vitamin D3¹⁰.

Similarly, sustained-release formulas are an important part of the growing focus on efficacy and represent a way for brands to tap into consumer desire for supplements that effortlessly fit into their busy lifestyles. By gradually and consistently releasing beneficial nutrients and maximizing their absorption and utilization by the body over time, these formulas can make consumers feel supported 24/7.



⁹FMCG Gurus – Top Ten Trends For 2022, January 2022 (<https://fmcggurus.com/reports/fmcg-gurus-top-ten-trends-for-2022-global-report/>)

¹⁰<https://www.dsm.com/human-nutrition/en/products/vitamins/ampli-d.html>

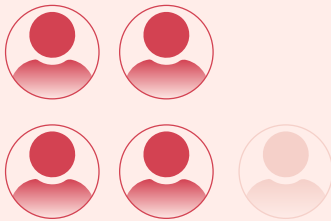


Sustainability reigns supreme



4 in 5

global consumers* say a combination of criteria would help them buy more sustainable products:



- Better product quality
- Better value for the money
- More information on how their purchases can help make an impact¹¹

Over the past 12 months, 66% of global consumers have become more attentive to the ingredient listings on food and drink products¹², and this trend will extend to supplements. To meet consumer demand for sustainably sourced ingredients that aid the immune system and are safe for the environment¹³, brands need to provide information on their positive impact.

Demonstrating a commitment to people and the planet not only increases consumer sentiment—it can also boost consumer spending. In 2022, 49% of consumers paid a premium for products branded as 'sustainable' or 'socially responsible'¹⁴.

dsm-firmenich aims to be at the forefront of positive change for a more sustainable future. Vitamin C produced in our Dalry plant in Scotland has the lowest carbon footprint of all Vitamin C on the market¹⁵, and we are revolutionizing supply chains for Omega-3s with the sustainable production of algal-based DHA and EPA.

¹¹(*83%) IBM – Balancing Sustainability and Profitability, 2022 (<https://www.ibm.com/downloads/cas/5NGR8ZW2>)

¹²FMCG Gurus – Top Ten Trends For 2022, January 2022 (<https://fmcggurus.com/reports/fmcg-gurus-top-ten-trends-for-2022-global-report/>)

¹³FMCG Gurus – Evolving Trends in the Immune Health Market – Global Report, 2022 (<https://fmcggurus.com/reports/fmcg-gurus-evolving-trends-in-the-immune-health-market-global-report-2022/>)

¹⁴IBM – Balancing Sustainability and Profitability, 2022 (<https://www.ibm.com/downloads/cas/5NGR8ZW2>)

¹⁵In comparison with average competitors, according to our Life Cycle Assessment validated by a third party in 2018 and refreshed in 2022

“Transparency builds trust.
We at dsm-firmenich offer
reliable information as well as
ingredients and solutions
that work.”

– Martín dos Ramos Farías

Vice President, Global Marketing and Business Development – Dietary Supplements
Health, Nutrition & Care

Personalization

The background is a solid blue color. It features several overlapping circles in a lighter shade of blue. Scattered across the page are various pills and capsules: a white pill at the top center, a yellow capsule on the left, a red and white capsule in the middle, a white pill in the middle, a yellow capsule at the bottom center, a red pill at the bottom left, a pink pill at the bottom right, and a white pill at the bottom center.

To meet consumer demand, brands must provide targeted solutions, precise formulations, and convenient delivery formats.



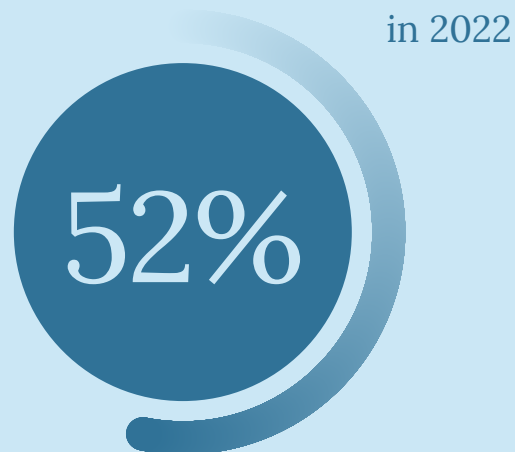
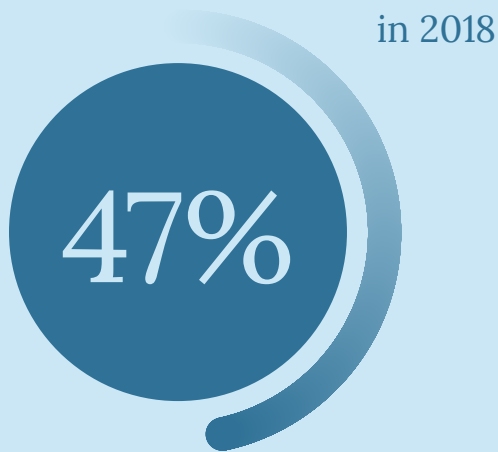
04

Brands should prioritize individual preferences if they want to foster consumer loyalty and generate positive word-of-mouth. Understanding and addressing age, gender, nutritional needs, and health concerns is the key to success in a competitive market.

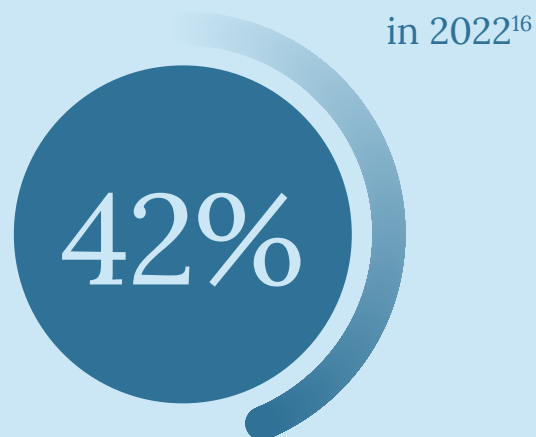
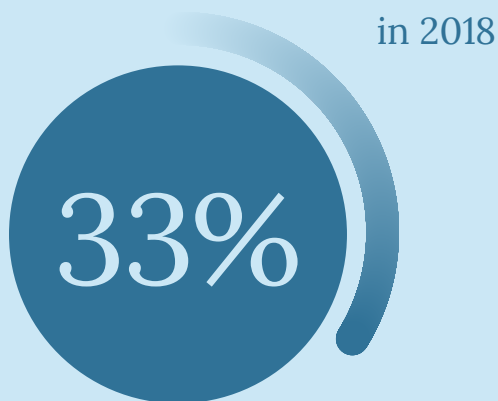
Especially for you

The growing popularity of letter vitamins and mineral supplements can be attributed to this increased interest in targeted formulations. With our wide range of ingredients (including vitamins, lipids, and botanicals) and application expertise, dsm-firmenich can develop targeted formulations that are not only technically optimized, but also backed by science to address specific health concerns. For instance, our Quali® brand of Western-produced vitamins assures quality, reliability, traceability, and sustainability.

Single-ingredient vitamin use:



Mineral supplement use:



¹⁶Mintel – Vitamin boost: Half of Millennials are using vitamins and supplements more often than they did before the pandemic (<https://www.mintel.com/press-centre/millennials-vitamins-and-supplements/>)



Convenience is key

Tablets and capsules continue to represent a convenient option, but as consumer interest in easy and efficient (and even enjoyable) delivery formats grows, innovations such as gummies, gels, chewable tablets, sachets, and sprinkles are rapidly gaining global traction.

41% of US supplements users prefer taking vitamins, minerals, or supplements in a gummy format¹⁷.

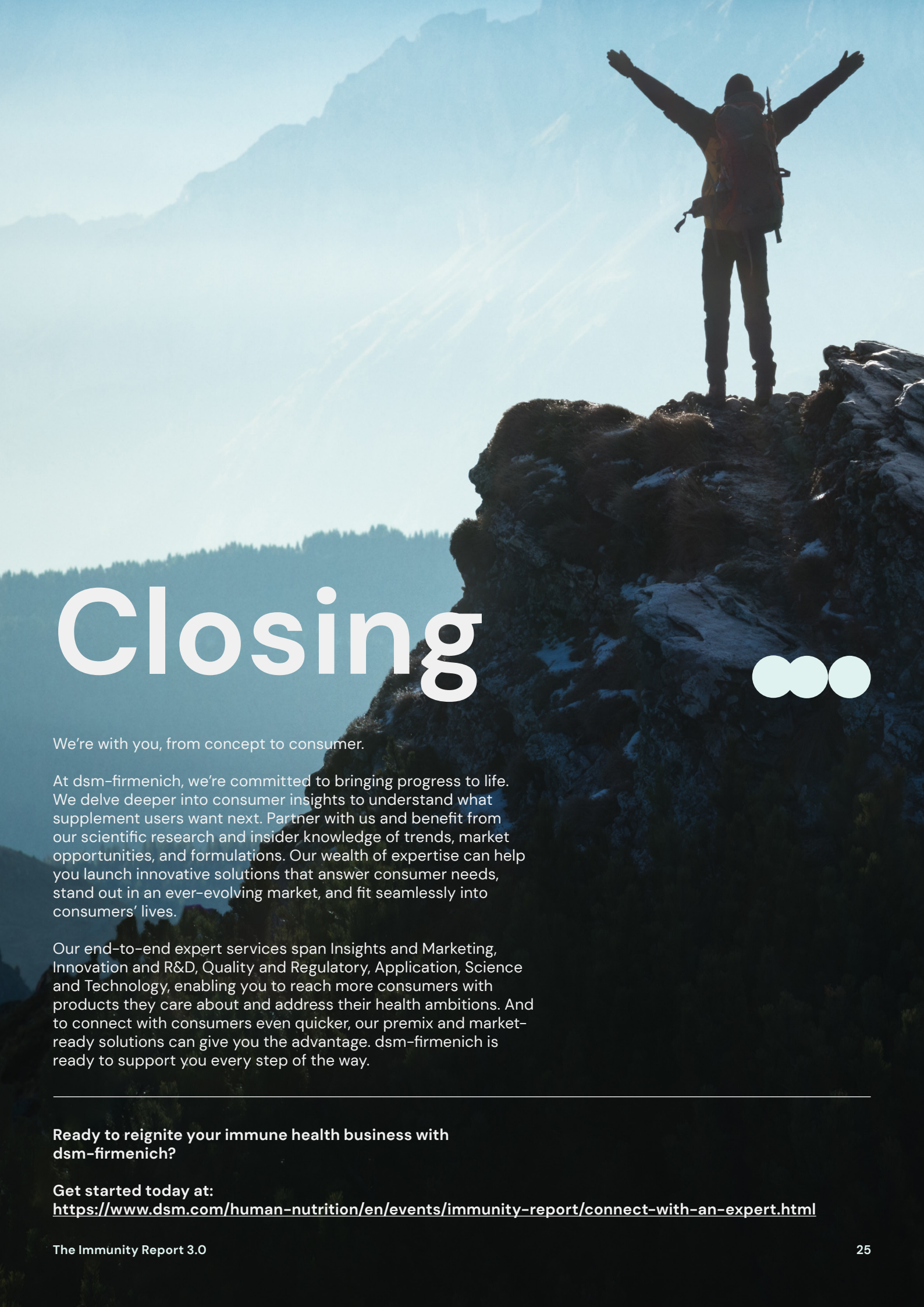
Our premix solutions are more than just ingredients. They are consumer-inspired formulations. Our portfolio of dosage forms—various dilutions of vitamins and minerals—and technical know-how allow for the optimization of gummies, tablets, capsules, and other formats.

In addition, our expertise in managing overages and working with dosage forms ensures our customers' products overcome production hurdles and meet label claims. For example, our immunity gummies and sachets with dsm-firmenich's Quali®-C and Quali®-D vitamins and zinc.

¹⁷Mintel – US Vitamins, Minerals and Supplements Market Report 2022 (<https://reports.mintel.com/display/1100911/>)

“With preferences shifting towards convenience and personalization, brands should seek to seamlessly integrate their products into people’s lives. Let dsm-firmenich support you with new formats and formulations for specific age groups and genders based on the category’s needs.”

– Anneleen Spooren
Head of Innovation, R&D and Regulatory
Health, Nutrition & Care



Closing



We're with you, from concept to consumer.

At dsm-firmenich, we're committed to bringing progress to life. We delve deeper into consumer insights to understand what supplement users want next. Partner with us and benefit from our scientific research and insider knowledge of trends, market opportunities, and formulations. Our wealth of expertise can help you launch innovative solutions that answer consumer needs, stand out in an ever-evolving market, and fit seamlessly into consumers' lives.

Our end-to-end expert services span Insights and Marketing, Innovation and R&D, Quality and Regulatory, Application, Science and Technology, enabling you to reach more consumers with products they care about and address their health ambitions. And to connect with consumers even quicker, our premix and market-ready solutions can give you the advantage. dsm-firmenich is ready to support you every step of the way.

Ready to reignite your immune health business with dsm-firmenich?

Get started today at:

<https://www.dsm.com/human-nutrition/en/events/immunity-report/connect-with-an-expert.html>