



hermes consilium



immune support market data.

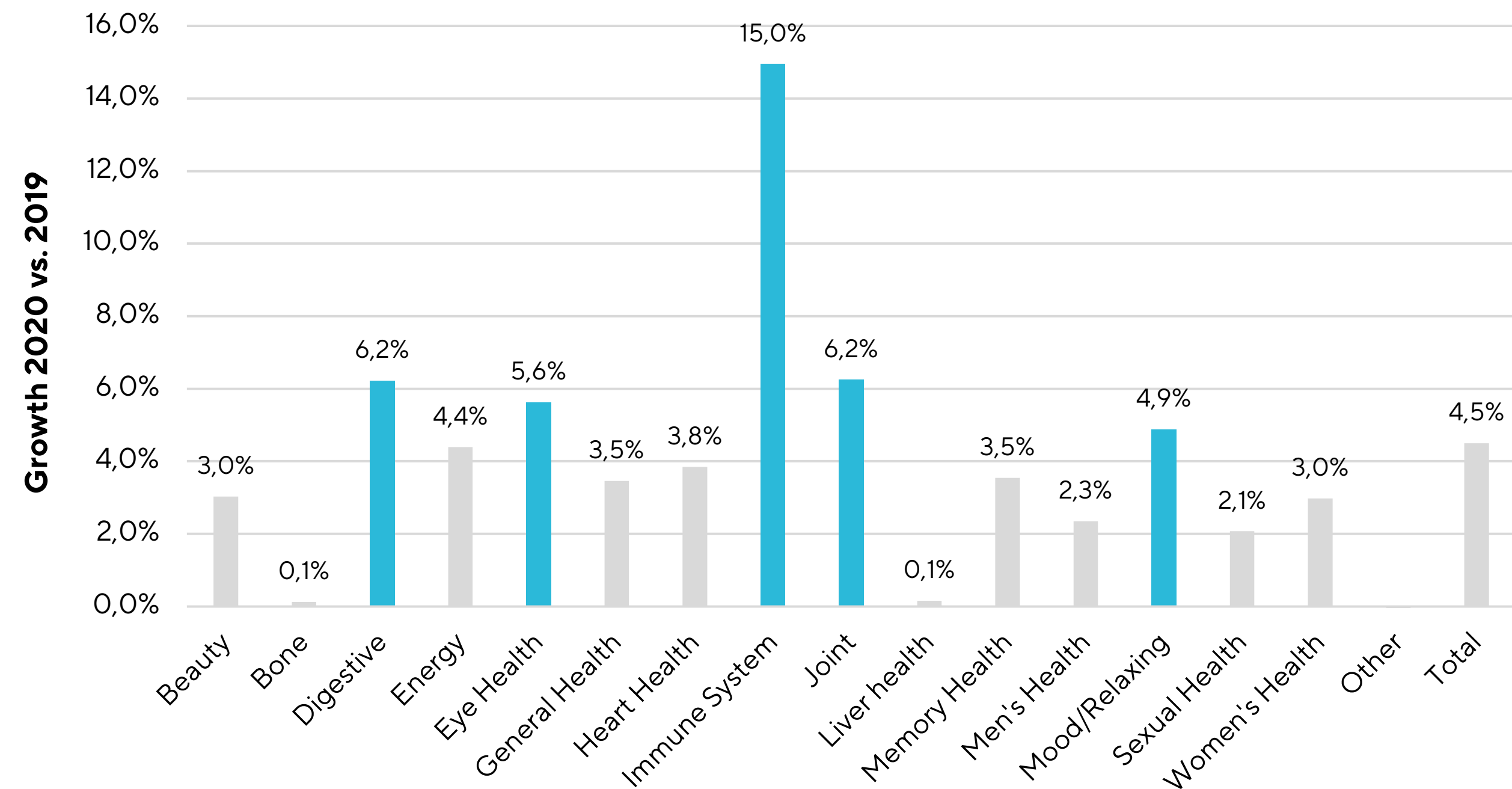
market data
ingredients
effect on different regions
combined positioning



immunity growth.

- within dietary supplements, there is considerable variability in sales of products, depending on their positioning
- immunity, digestive, joint, eye health, and mood/relaxing supplements grew more than the total market average in 2020 global sales

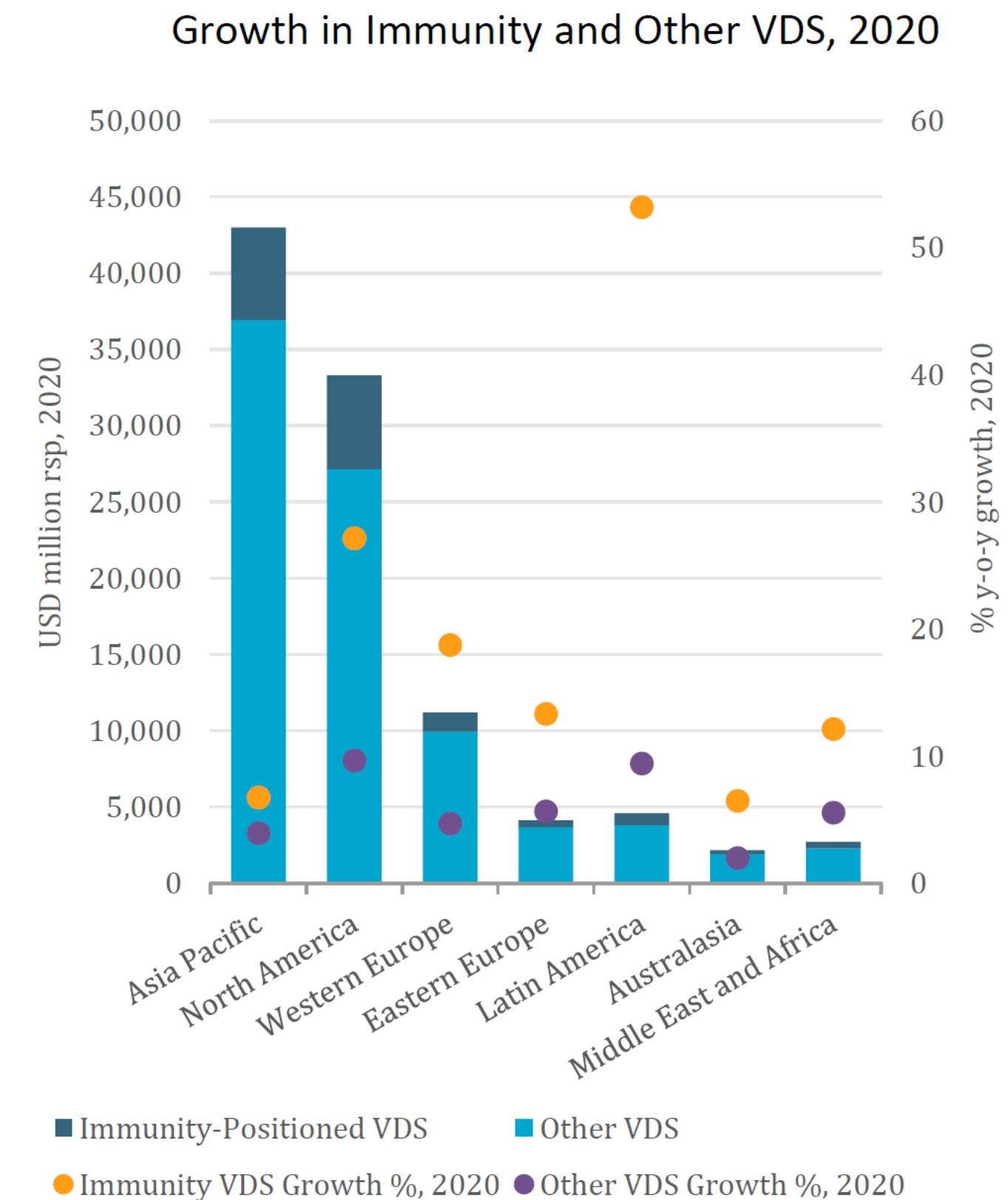
Dietary supplements by positioning



Source: Euromonitor Consumer Health data, December 2020. Note: vitamins not included.

immunity growth.

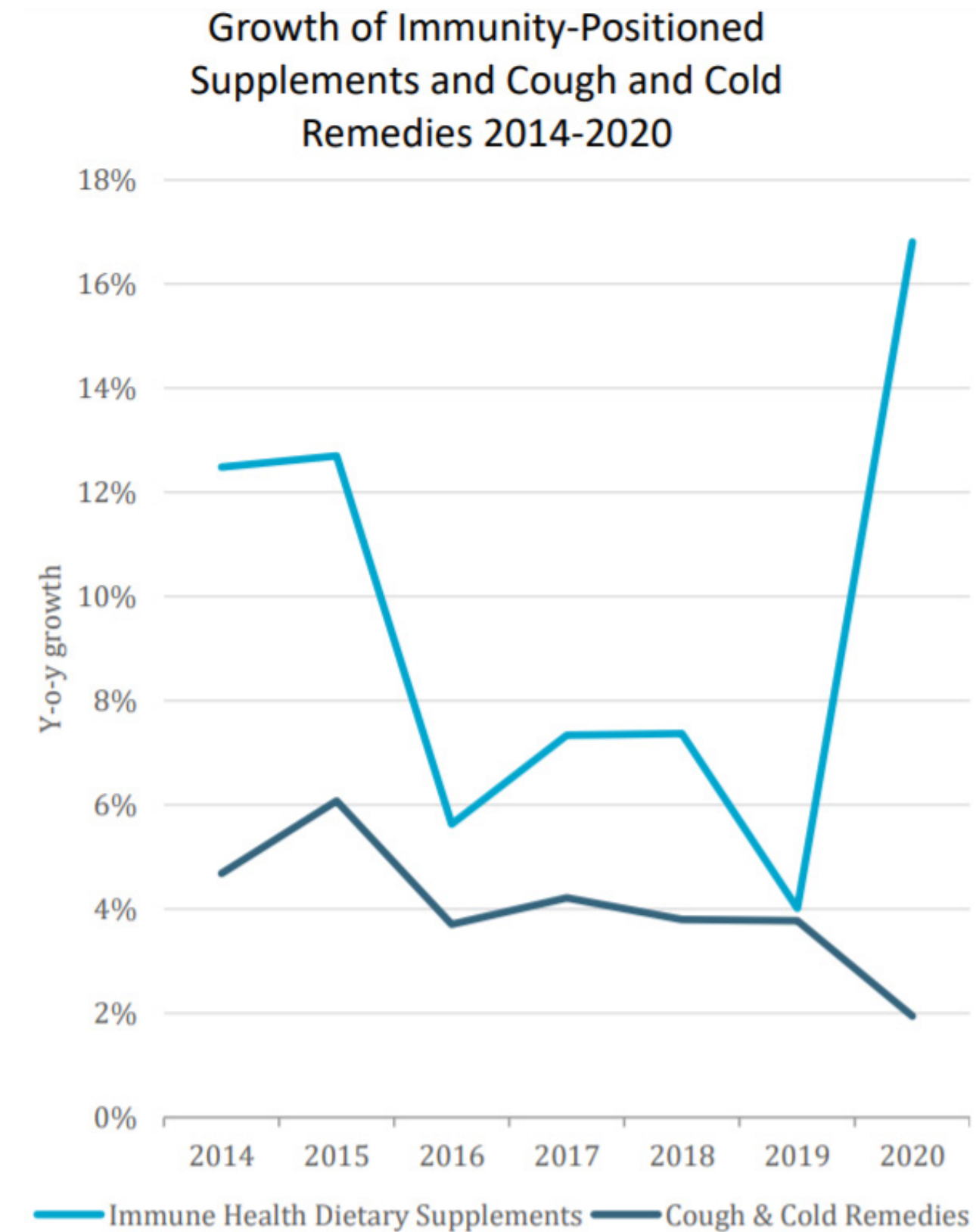
- **immunity growth has “carried”** the VDS (vitamins and dietary supplements) segment in 2020
- **some markets are extreme cases -** Latin America saw 53% growth for immunity VDS versus just 9% growth for VDS with other positionings
- **immunity represented 15%** of the global VDS marketplace in 2020



Source: Euromonitor - Consumer Health: World market, October 2020.

preventive vs. acute.

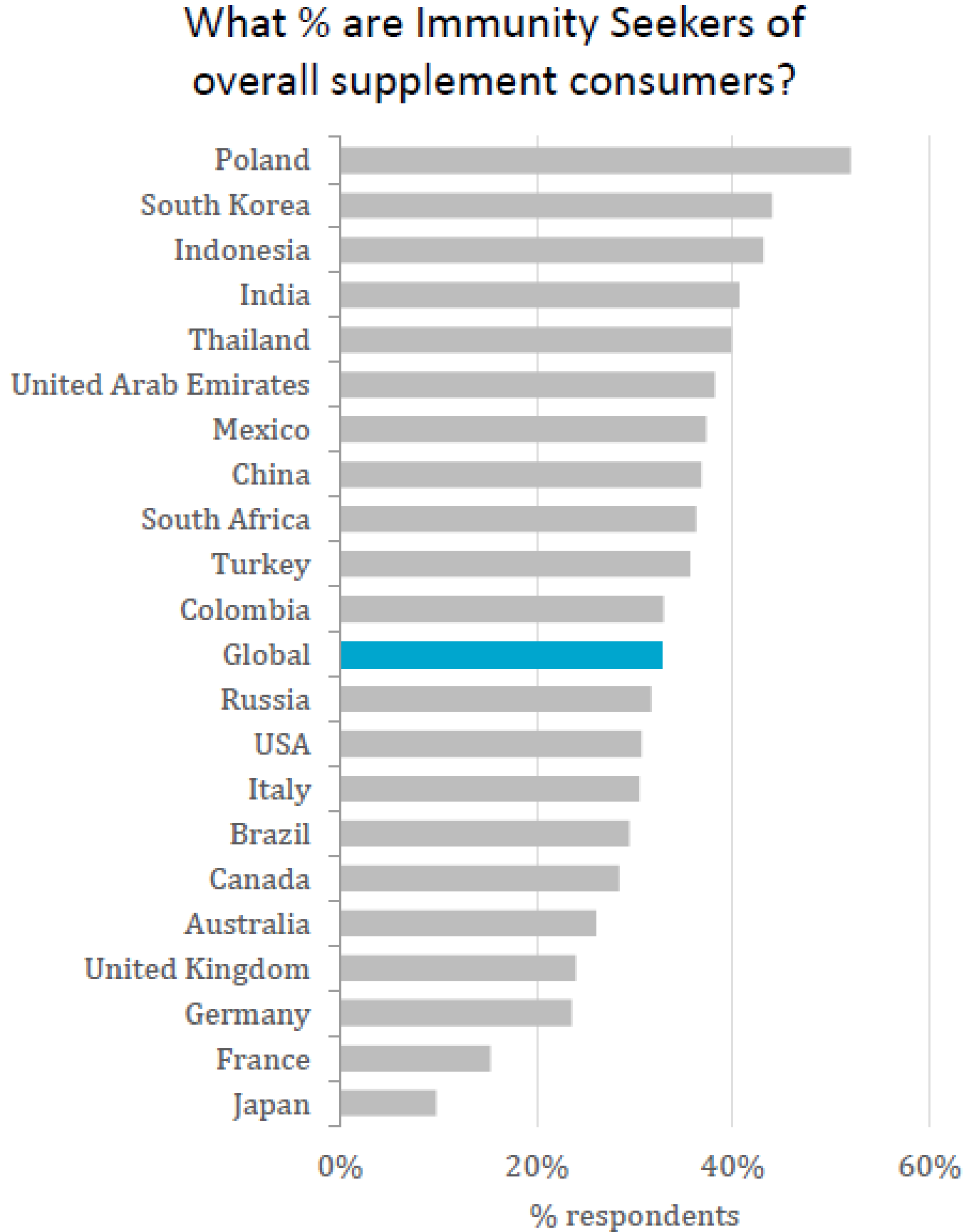
- **the effect of the pandemic is not uniformly positive for the immunity category**
 - cough and cold remedies (OTC) have seen an even steeper decline in growth
- **clearly, 2020 has brought outstanding focus on prevention** - immune health dietary supplements thus flourished



Source: Euromonitor Immune support report, October 2020.

markets.

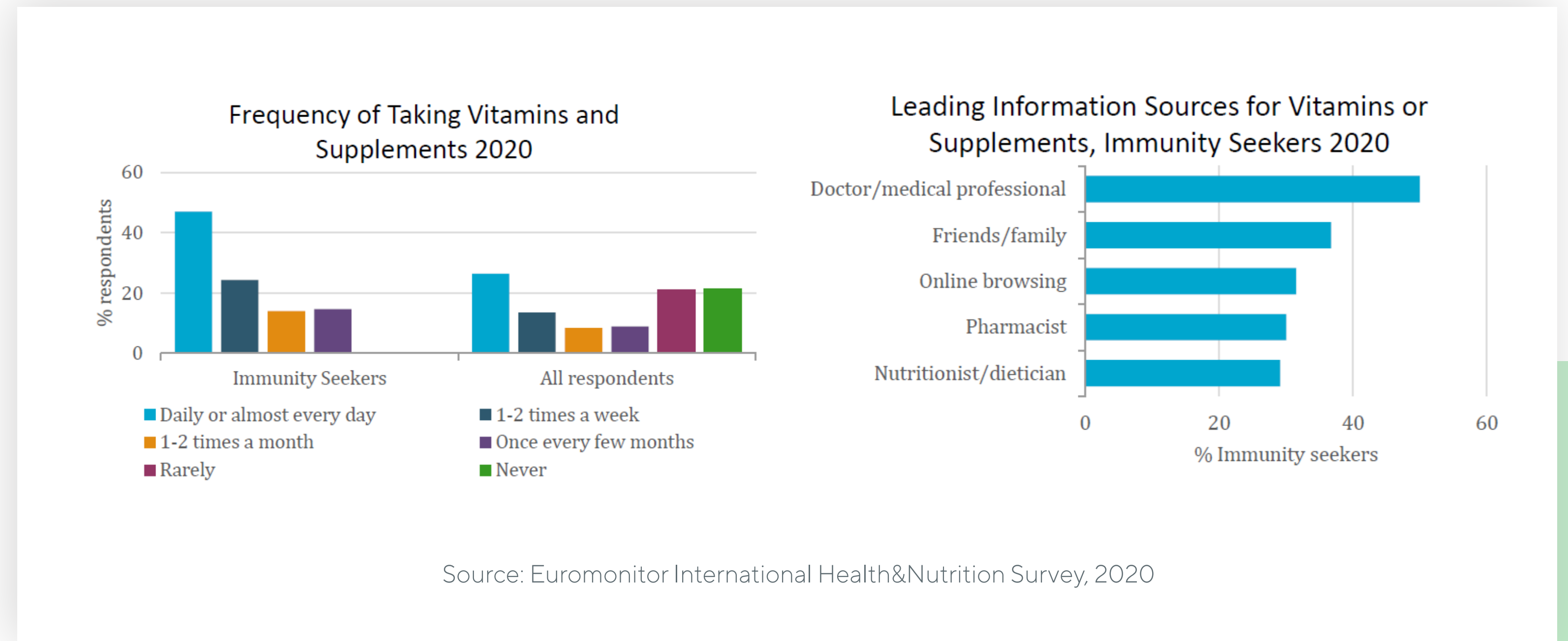
- **32,6% of supplement consumers are immunity seekers** (people who report consuming vitamins and dietary supplements specifically for immune health)
- **even within Europe, the percent of immunity-focused supplement consumers varies significantly** - from over 22% in Germany to over 50% in Poland



Source: Euromonitor International Health&Nutrition Survey, 2020

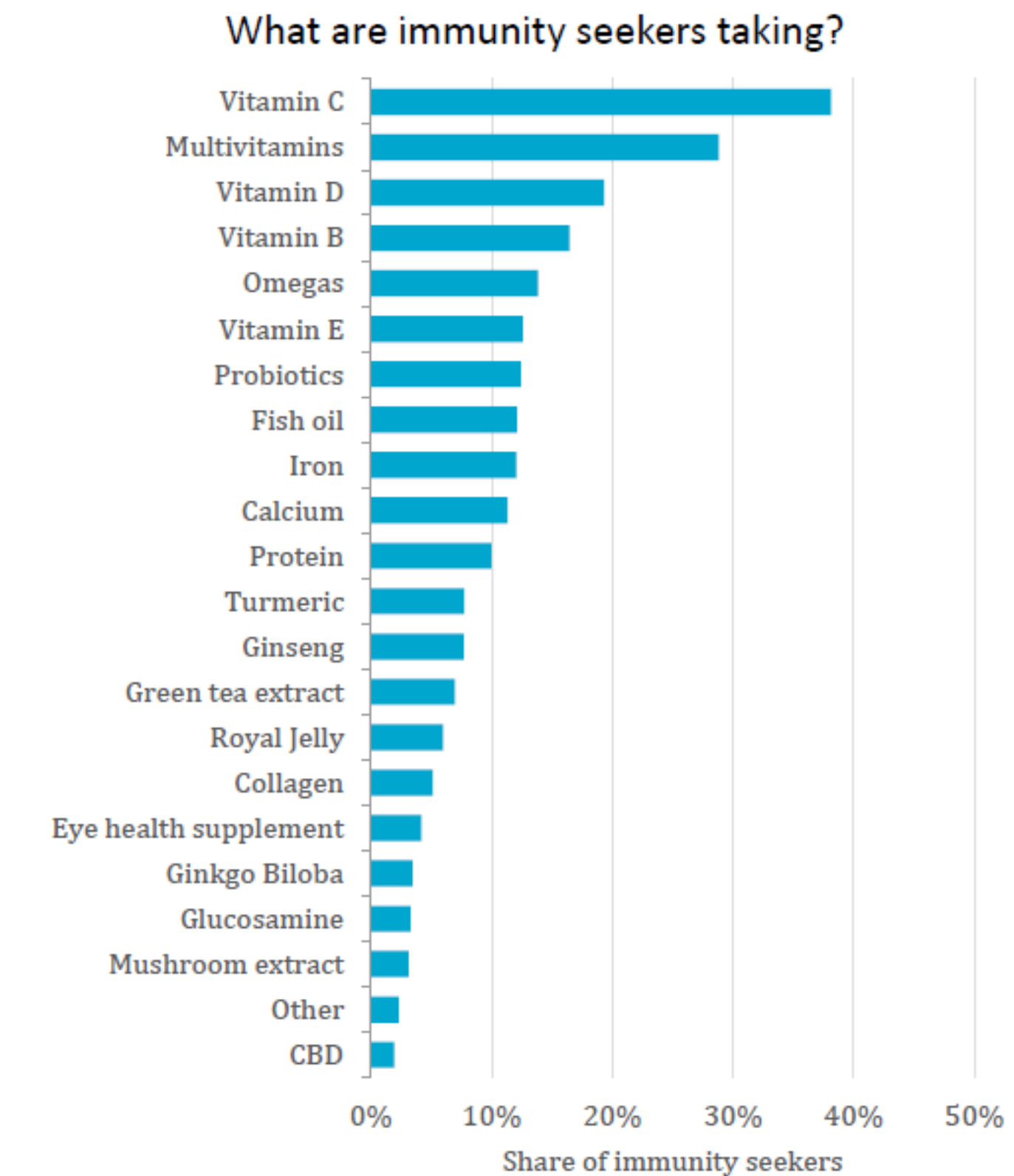
targeting immunity seekers.

- **immunity seekers are much more frequent users of VDS** - 47% claim usage daily or almost every day, as opposed to just 26% of all respondents
- **targeting immunity seekers with at least 1 product** could create loyal and frequent users also of other products under your brand
- **doctors/medical professionals are the leading source of information for immunity seekers** - formulating clinically supported products may thus be a prudent choice



ingredients.

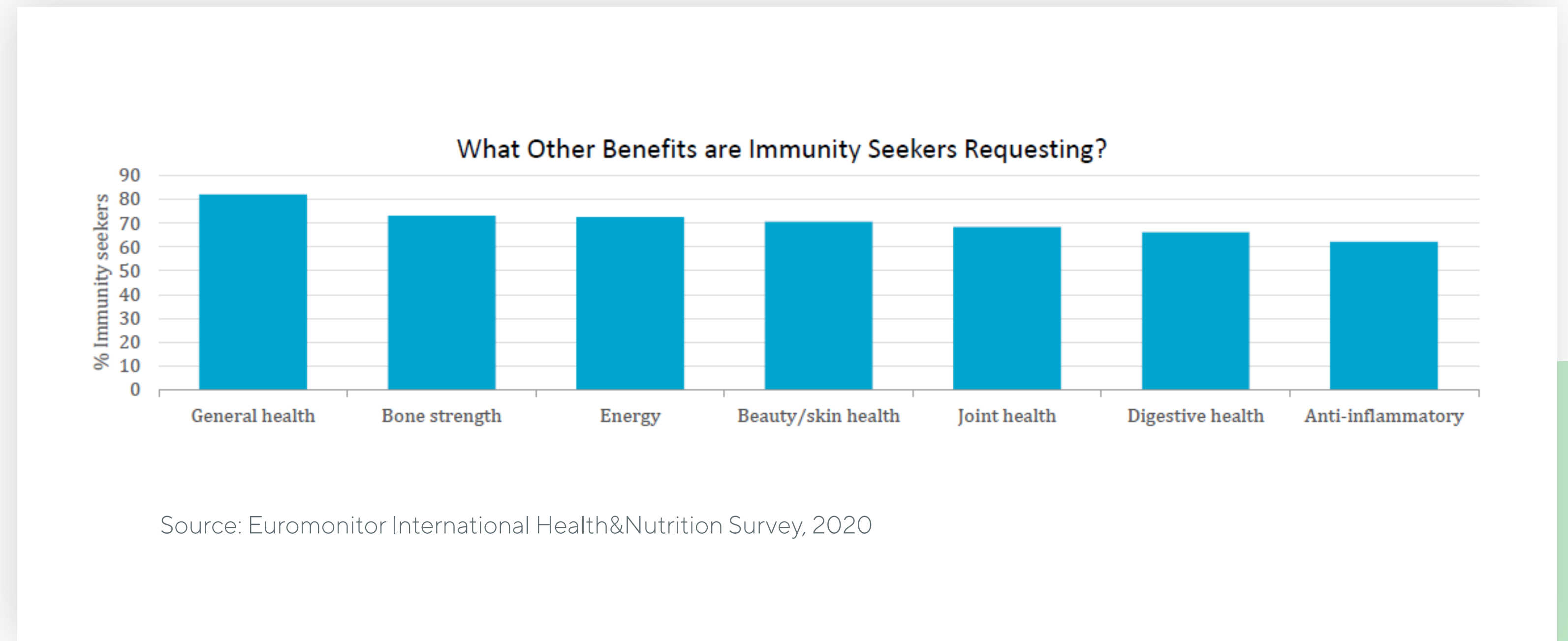
- even the most popular ingredients such as **vitamin C** are being consumed by less than **40%** of global immunity seekers, which means that this group engages broadly on the topic of immunity
- **immunity seekers report engaging with various supplement ingredients** widely known and used for adjacent health benefits
- **formulating with several and diverse ingredients with additional health benefits** may appeal to a larger spectrum of supplement consumers



Source: Euromonitor International Health&Nutrition Survey, 2020

combined positioning.

- **immunity seekers are also interested in other benefits aside from immune support - 82% of them also request general health**
- **other benefits, from bone strength and anti-inflammatory effects, are also in high demand**, opening many options for combined or multiple positionings of immunity products





hermes consilium

Hermes Consilium Ltd.

www.hermes-consilium.com | info@hermes-consilium.com | +386 1 434 56 78

Cesta v Mestni log 88a, 1000 Ljubljana,

SI - European Union