

Immune Support in the Eye of the Storm

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Seasonal Wellness

Finding a responsible way forward for immune health and seasonal wellness nutrition.

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The elephant in the immune health “room” is the global COVID-19, or coronavirus, pandemic.

Recognizing that no ingredient or supplement can (or ever should) be marketed with implicit or explicit claims regarding this virus or any disease for that matter, our panel of experts talk about the challenges that ingredient companies and brands now face.

They discuss the current ordering crush for vitamin C and zinc, while talking about whether we have, aside from that, entered a new age of immune health.

With that in mind, roundtable participants also discuss not only the incredible rise in probiotics, but also the sea change from just seasonal immune support, and just “cold and flu season” support, to potentially much more holistic consumer and marketplace attitudes about immunity.

In addition, they shed light on predictions for the category, aside from and in light of the current crisis.

NIE: While no ingredient or supplement can (or should) ever be marketed with implicit or explicit claims regarding this virus or any disease, please briefly talk about the challenges that ingredient companies and brands now face—they have products that do help immunity and they want to remind customers about that, but they need to tread super-

cautiously talking about their products/ingredients’ immune-support benefits.

Eng: A key challenge is fulfilling demand and remaining sustainable. Globally, consumers are aware of dietary supplements for immune support, and naturally do turn to our industry’s products to remain relatively healthy. And yes, it would be tempting for new companies to jump in and take advantage of the unprecedented fear that is pervasive throughout the world. Ingredient suppliers must also vet new requests for immune ingredients, as we are susceptible to regulatory rebuke as well.

Weiss: Unfortunately, due to some misguided decision making by a minority of companies who make unsubstantiated disease prevention/treatment claims to gain sales, the immune health market will continue to get scrutinized. The dietary supplement industry must work harder than ever to counterbalance these few acts of mistrust.

On the flip side, the consumer segment that are looking for supplements for immune health may do their research, which is a huge positive. Ingredient companies should continue to publish their research and nutritional experts should continue to analyze, report and provide helpful consumer content. If we as an industry keep pushing out educational and truthful information (backed by strong science) to consumers, word about efficacious ingredients for immune health will get noticed.

Lifton: We should remember that the natural products industry has a special responsibility to be even more careful than perhaps ever before, and precisely because consumers are feeling desperate and vulnerable right now.

That being said, this is a time for brands to show their true colors. Brands should, for example, be doing everything they can to support enhanced online ordering and fulfillment, to provide outstanding customer service, to reduce seams and pain points throughout the entire customer experience.

Companies have an opportunity to become a better version of themselves. It’s sort of like an open-enrollment period for brand rediscovery. But let’s just do it right. There are products that do help support immunity and immune function, but the biggest challenge we face, especially during this global pandemic, is educating the consumer so they understand which product is right for them.

Pal: There are supplements, like vitamin C, that the consumer understands, but other ingredients that may be far more impactful on the immune system are less familiar, like spirulina. For instance, a study out of UC (University of California) Davis found that spirulina helps the immune system make more infection-fighting molecules. Spirulina does not act directly on the infection, but it can help the immune system mount a response.

Getting the right message, like this, to the consumer when they are worried about their immune health makes the challenge tougher, but the more we focus on health and immunity education along with supplement science, the better for the brand and for the consumer, too.

Laaman: Yes, I think this is a perpetual challenge made all the more difficult in the current climate. It’s frustrating because we have products that truly make a difference, but are limited in what we can say. We can only do what we’ve always done, which is work within the system to highlight products that promote immune health with a two-pronged approach, 1) primarily highlighting scientific research, and 2) using anecdotal evidence.

***NIE:* Immune health; the more the category changes, the more it stays the same. With all of our sophistication and scientific advancements regarding specialty nutraceuticals, consumers have been buying huge quantities of vitamin C and zinc. These nutrients are super-important, however, is this a good thing for the immune health category or not, or something else, and why?**

Parikh: Our research shows that 80 percent of dietary supplement consumers indicate that knowing the source of ingredients is important when making a purchasing decision. As such, clean-label immune support products and ingredients which are plant-based, or naturally derived, are of increasing interest to consumers—a trend which shows no signs of slowing down.

Meanwhile, manufacturers have more options than ever for plant-based or naturally derived immune health ingredients with a science-backed mechanism of action (MOA). This offers innovative and efficacious alternatives to well-known products like vitamin C or zinc. Highly informed, aspirational consumers are more receptive than ever to new formulations when the science behind them is robust and they are positioned in line with their values, such as clean-label, vegetarian etc.

Bulger: Vitamin C and zinc are important, but they're not the beginning and end of the immune health story by any means. Part of maintaining a strong immune system is directly supporting the over 70 percent of our immune system that resides in the gut by putting a close eye on digestive health.

What proves challenging for general health and wellbeing is that there's no silver bullet to strengthening the immune system, because it's not a straightforward function. It's far too complex to boil down into a small pool of nutrients. Vitamin C and zinc serve a specific nutritional purpose to the body, but there are significant benefits to taking a more rounded view of health, and that starts with gastrointestinal health first and foremost.

Ulve: Even if this is a good thing, it indicates that there's a lot of demand, but the consumer has limited options. The chaga mushroom, for example, is one ingredient consumers could consider for their immune health. Its clinical studies have demonstrated chaga's beneficial effects as an immune-modulator, with positive effects on white blood cells and improving viral resistance.

The industry needs to lift its standard for actual substantiation and consumer education. We need to get rid of the lower quartile of products that often have unsubstantiated claims, if not fake and adulterated claims.

Kreienbrink: There is more to the immune health category than just vitamin C and zinc. This, in itself, is not a bad thing for the category since both have a proven track record. The "limitation," however, may be more on the consumer end, where people could benefit from a greater diversity of botanical options.

***NIE:* And the flip side is, if we have entered a new age of vitamin C and zinc popularity, what should formulators keep in mind in choosing the most effective forms?**

Weiss: Whether it is the immune health market, pre-workout market or other markets, formulators should keep in mind the doses and forms of ingredients used in studies, for efficacy and established safety.

This certainly applies to immune health ingredients like zinc. Formulators could choose the cheapest, least absorbed form of zinc just to have it on their label. But I think they will find consumers will ultimately go toward the premium forms of zinc, like Zinmax zinc picolinate, where the research and consumer press will drive customers who are targeting efficacious products.

Pal: A key point here is that more is not necessarily better. For example, the body needs a certain number of calories a day to maintain healthy weight—not less, and certainly not more. In addition to the right amount, we also need to think about bioavailability, or more specifically the ability of the body to take in and use the ingredient. So, in choosing the most effective form, it is important to know if any data are available on the body's ability to use the ingredient, and how much is needed.

***NIE:* Broadly speaking, what is the overall state of the market for natural ingredients and products for immune support?**

Jenkins: The natural ingredient and products market has seen increased interest in support of immune health as well as overall health and wellness. People are looking for ways to improve overall health, and in turn, help maintain a healthy immune system.

It also happens to be allergy season, where more people look for solutions for allergy-related symptoms. We suspect that this trend will continue upward and while this is exciting as an industry to see new interest, it might also become concerning for some in terms of supply for that demand.

Botanicals are seasonal, which can in turn impact acquisition for these materials and could lead to sourcing from less reputable sources. It is critical that traceability, sustainability and quality standards are at the forefront for ingredient suppliers and finished formulators alike to ensure seasonality or increased demand does not impact the quality of these ingredients.

Additionally, we are hyper-aware that the industry must refrain from overpromising on claims and should understand, and communicate, the science backing the ingredients. Formulation and marketing must be done responsibly and ethically, and as an industry we must stay vigilant and ethical in bringing forward the best options.

Bulger: The overall market for immune health supplements is growing at a significant 7.5 percent CAGR (compound annual growth rate) and is currently anticipated to reach a collective value of \$28 billion by 2027, according to statistics from intelligence agency MarketWatch. In the current climate, this may be even higher, and the nutraceutical market today has abundant opportunity—perhaps nowhere more so than in gut health. Collectively, we understand the gastrointestinal tract and its

behaviors more than ever before, and we're continually finding out more about its role as the "control tower" of the body.

Hippocrates famously said that "all disease begins in the gut." While not quite all, what we are finding is that the gut has an important influence over the rest of the body, and that includes the immune system.

To brands and consumers alike, the importance of the gut microbiome is still growing in awareness in terms of how we bolster and support an effective immune system. We know a great deal more about the gut's influence over areas such as cognition and cardiovascular health, but are only recently uncovering the benefits to immune system growth.

Brewster: Immune health has been and will most likely be, one of the top reasons that consumers seek out supplementation. While other categories of supplements may be perceived as situational—sports and joint health products, for example—immune health seems to always be relevant no matter the individual or the time of year. In 2018, vitamins made up \$6.6 billion in sales and vitamin C supplement sales grew 8.6 percent.

And now, with COVID-19, consumers are worried even more about their immune health. We believe the current spike in immune health sales will continue on a strong growth trajectory through this year and into the next as a preventative measure, even after things settle down.

***NIE:* In general, and not just this month, which consumer segments/demographics are most concerned with immune health?**

Brewster: Without a doubt, early infancy and the aging demographics are the most concerning with regard to immune health. Both are considered at-risk due to a newborn's immature immune system and the aging demographic facing the everyday effects of aging and typically a more sedentary lifestyle.

However, this does not mean that younger generations aren't worried about their immune health as well. According to the Natural Marketing Institute, 66 percent of U.S. consumers are already using a supplement to manage immune health. Whether it is because of work, athletics or scholastic activities, consumers of all ages are taking extra precautions to make sure they are fit to participate in their daily routines.

Edwards: Adult consumers are looking to stay healthy year-round, emphasized by the recent global health threats. Several surveys have identified overall health and well-being, digestive and immune health as top reasons consumers take supplements.

A Kemin Human Nutrition and Health survey on 1,200 U.S. supplement users to better understand their attitudes and usage of immune health supplements, found that over one quarter of supplement users were currently taking supplements for immune support and 70 percent planned to take immune support supplements in the near future.

Prescott: We at ProBiotix Health [have found that] those purchasing health supplements tend to be in their 50s and 60s. But this is beginning to broaden as those anywhere between 25 and 65 are now becoming much more engaged with their immune systems. Functional foods in the dairy

market, particularly yogurts, that can help lower harmful cholesterol and combat cardiovascular disease are gaining in popularity, as those in the younger demographics start thinking proactively about their weight.

Green: Immune health is increasingly important to people of all ages and generations, though research suggests certain groups, such as parents with children, are slightly ahead of the curve. According to HealthFocus International data, 45 percent of all consumers are “extremely concerned” or “very concerned” about a “weak” or “stressed” immune system. In particular, consumers age 30-39 (52 percent), 50-64 (51 percent) and households with children (49 percent) were most likely to report these results.

The HealthFocus research also suggested a sizable number of shoppers are interested in taking actions to support their immune health. In the HealthFocus survey, nearly a third (30 percent) of consumers reported “always” or “usually” choosing foods and beverages to boost their immune system. The highest interest was among consumers age 30-39 (40 percent) and households with children (37 percent).

Parikh: As global populations continue to get older on average, interest in immune health naturally continues to rise among [Baby] Boomers and Gen X consumers. We have also seen more Millennials and younger people who are looking to support their immune health, not just over winter but year-round. Parents, meanwhile, seek to support their children’s health and wellbeing in addition to their own.

Across demographics and backgrounds, the rising prominence of aspirational values signals that consumers are interested in supporting health over the long term, and immune health plays a major part in that.

NIE: **Has the market, or have consumers moved away from a strictly seasonal approach to immunity, e.g., “cold and flu season,” and over to daily immune support? If so, please expand.**

Lifton: People are more aware that sustained health and wellness is important to think about in a daily active approach as opposed to peak seasons or once they are more at risk. I think consumer demand and product offerings have been changing. With climate change even causing a blurring of the seasons themselves, and various “bugs” increasingly coming and going in non-winter seasons, it has been becoming increasingly clear that a more broad, less reactive and less seasonal approach to immune health is needed.

Jenkins: Yes, [people] are more aware of the many factors on an ongoing basis that impact immune health including environmental stress, physical stress and the impact diet has on maintaining a healthy immune response. Not only are people looking for immune support during specific times during the year, they are looking for ongoing support to remain healthy all year long.

We see the same trends in many segments, like healthy aging for example. It is not only older adults looking for cognitive support benefits, but young adults looking to support cognitive acuity for today and for the future. The same is true here for immune health as people look for solutions for year-round benefits.

Laaman: The seasonal approach has definitely been eliminated for the time being. We foresee consumers will continue to think of immune health in the foreseeable future as a year-round concern. The pandemic is going to change our approach to a lot of things.

***NIE:* Since we are in the “Age of the Microbiome,” what impact is this having on research and development for immune-supportive ingredients and products?**

Bulger: The complex symbiosis of the gut microbiome has had a huge impact on not only immune health, but how we approach wellness overall. Particularly, following the first part of the Human Microbiome Project, we are finding new avenues of exploration in disease management and getting a clearer picture of how each part of the human body plays its role. What is central to this understanding, is how we can modulate the overall health of the body from within, by first taking note of gut health and microbial biodiversity. For the nutraceutical industry—and even more so for functional food manufacturers—the future is looking extremely promising.

Lifton: Fortunately, research has been increasing, and an understanding in the importance of strain-specific science is also building. Also encouraging is the movement away from a pure numbers game in probiotics focused on how many billions of CFUs (colony forming units) does this product provide compared to that product.

Prescott: Recent advances in molecular and analytical techniques have permitted identification of bacterial species and strains that inhabit the gastrointestinal tract, their metabolic activity and interactions with the human host. These studies have provided greater insight into the role of gut microbes and their metabolites in health and disease. Following research into the microbiome, including the study from Oxford University, we now have a clearer understanding of how the human and microbial cells interact with each other. This has enabled ProBiotix Health, among others, to develop a range of technologies which modulate the microbiome to prevent and manage human disease. With continued investment, the immune health market will flourish through evidence-backed products.

***NIE:* What are the most exciting delivery forms for immune support products today?**

Jenkins: It's exciting to see innovative approaches for immune support products and how formulators seem to be seeking out ways to make these solutions effective, efficient, and in some cases even delicious.

Gummies are of course a common delivery form popular with consumers for immune support, but we are seeing more interest in food and drink grade ingredients to add to finished products to stand out in such a crowded area.

Capsules are another important delivery form for immune support products as they offer unique mixes of synergistic ingredients and offer protection for sensitive ingredients. This offers opportunity for formulators to provide multiple benefits in one solution.

Pal: Consumers are driving the need for innovation, and new delivery forms are certainly available. Powders and ad-mix options are becoming popular because the consumer can customize the way they approach immune support.

***NIE:* What are your predictions for the immune health category in the second half of 2020 and for 2021?**

Kreienbrink: I predict the immune-health category will grow by at least 10 to 15 percent in the coming year. The global pandemic has everyone on “health watch” for themselves and their families. Whatever can be done through diet, exercise and supplementation to keep the general public healthier is going to be tested by large populations. This translates to large growth for dietary supplements in the immune-health category.

Ulve: This category will make a big jump [now] and then continue to increase through 2020 and 2021. [We] will see very rapid growth for the next five to 10 years.

We predict that there will be a significant boost in the general population’s curiosity and later knowledge-base regarding immune system functions because of SARS-CoV-2 and COVID-19.

Consumers might become much more aware of terms like “innate immunity,” “adaptive immunity,” and the difference between the two. Consumer education and awareness will be improved, and as a consequence of that, they could become more informed and specific in [what they want].

Green: It seems clear that interest and demand for products that support immune health will increase in the weeks and months ahead—but consumers will be looking for products backed by scientific research. NIE