







Immune Support & Other Functional Claims Market Trends May 2021



For more information, please contact Tree Top Ingredients at 509-698-1435

Source: Michael Sellitto, Mintel, Contributing Editor Mintel Global New Products Database (GNPD)



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Immune Support Claim Becomes Paramount to Consumers in 2020

"Real" food must feature familiar ingredients

Low/no claims are becoming less prevalent within the food market while claims associated with clean labels (eg, presser-vative-free) and other free-from claims are growing. Consumers now associate clean labels with a product's overall healthfulness.

Consumers turn to beverages for functional benefits

Beverages feature more functional claims than food, reflecting how consumers often turn to beverages for specific need states (eg for afternoon energy) and the desire for tasty drinks that also provide a healthful benefits.

Current stressors offer product opportunities

The pandemic created new opportunities for products that promote immune support, and high levels of stress indicate an opportunity for products that help consumers relax, unwind and enjoy a good night's sleep.

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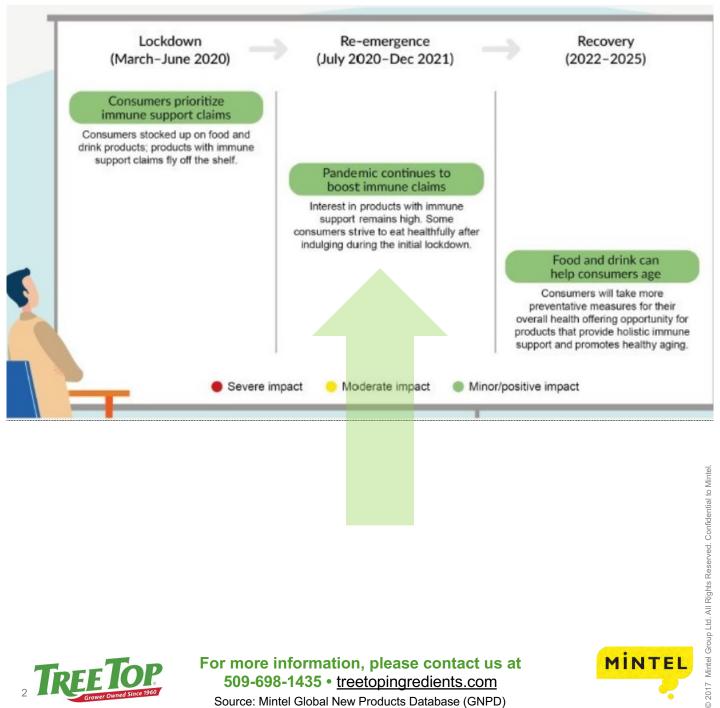
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Short-, Medium- and Long-Term Impact of **COVID-19 on Nutrition Claims**





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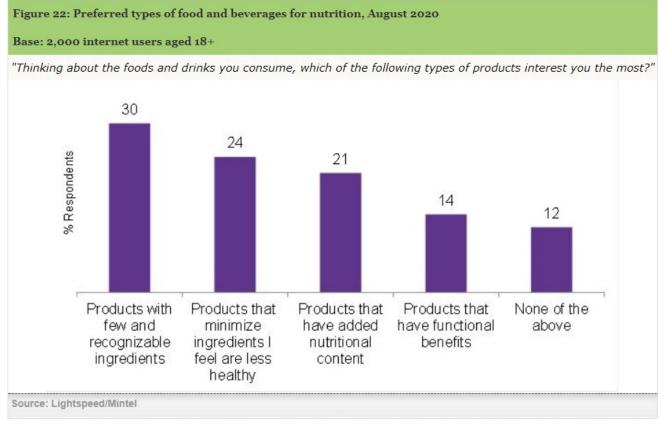


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Keep it Simple

Healthfulness and nutrition are very much connected to real ingredients in the minds of consumers. Consumers are more interested in food/drinks featuring clean labels than those with minimal unhealthy ingredients or foods/drinks with added nutrients. Interest in clean label formulations has had a major impact on the food industry as companies launch more products with free-from claims while the incidence of food product launches with "no" claims (eg no fat, no cholesterol, etc), signifying formulation reductions, has decreased.

While overt nutrition claims are important, consumers now largely expect healthy foods/drinks to also feature all-natural ingredients and clean labels.





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Probiotics for Immunity

Probiotics offer several functional properties beyond gut health, including stimulation of the immune system. Already, 43% of US consumers who take probiotics do so for immune system health.

Probiotics that are proven to support immune health will appeal to consumers who are taking a proactive approach to health. While the immune system is complex, research is exploring the role probiotics may have in supporting the body's defense system. A recent study found that a combination of probiotics could significantly reduce the incidence of upper respiratory infections.

The COVID-19 crisis is leaving consumers to grapple with uncertainty. Food and drink products that offer immune system support will appeal to consumers looking to protect themselves.



Hibiscus Mango Water Blossom Water Hibiscus Mango

<u>Water</u> is infused with crisp Nigerian hibiscus and succulent mellow mango and contains 10 calories. The Kosher certified products is claimed to contain as much immune benefit as one billion CFUs of probiotic. (USA)



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Immune Health is Untapped Opportunity

In products making a probiotic claim, functional claims related to digestive health are more common than immune system claims across most categories.

USA: Launch Activity of Select Drink Categories with Probiotic Claim, by digestive & immune claims, 2018 - 2020

| | Hot Beverages | Juice Drinks | Nutritional Drinks & Other Beverages | RTDs | Water | Total Sample |
|------------------|------------------|-----------------|---|-------|-------|-----------------|
| Digestive | 60.0% | 55.6% | 26.7% | 50.0% | 33.3% | 32.9% |
| Immune System | 40.0% | 41.7% | 9.1% | 0.0% | 50.0% | 16.2% |



Elevated Nutrients Immunity Carrot Mango Juice Drink

Suja Organic Elevated Nutrients Immunity Carrot Mango Juice Drink contains 19% juice, 8g of sugar and live probiotics. The product is enriched with key vitamins, minerals, and functional ingredients including vitamin C from acerola cherry and vitamin E from annatto.



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COVID-19 Puts Spotlight on Immune Support Claims

Consumers purchased any and all products carrying an immunity support claim during the initial period of the pandemic, leading to stellar sales of juice, tea and vitamins/minerals/supplements. High interest in immune support products will remain throughout and after the pandemic as consumers seek products that help prevent illness. Products that provide convenient immune support such as juice shots will increase in popularity. Gut health and immune support claims will merge as consumers take a holistic approach to supporting their immune system, indicating new opportunities for pre- and probiotics.



IQ Bar – Lemon Blueberry: The bar contains the following six brain nutrients: Lion's mane that is a superfood for staying sharp; MCTs, slow-burning fats for mental energy; omega-3s, the building blocks for cell membranes; flavonoids, polyphenols to fight free radicals; vitamin E which is an antioxidant for cell membrane support; and choline, which is a compound for neurotransmitter support.

WellWell – Pear + Ginger Wake Drink: – a

adaptogen blend for the brain and mind made with lion's mane mushroom, Rhodiola rosea, Bacopa monnieri, ginseng and green tea extract.



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Recent Studies Reveal the Link Between the Gut Microbiome & Immune Health

The association between the immune system and gut has sparked a new era of research. The gut microbiota plays an important role in educating and modulating the immune system of an individual by stimulating the maturation and functionality of immune cells through their metabolites. Any change in gut flora directly influences the immune function and vice-versa.

Recent patents also elaborate on the association of gut microbiome and immune system:

A granted patent by Kyung Hee University covers a novel lactic acid bacteria (*Lactobacillus fermentum* IM12-accession number: KCCM 11806P) derived from the human digestive tract having immunoregulatory activities.



Active probiotics for gut and immunity

North Coast Organic Apple Sauce + Probiotics Pouches claim to help gut and immune health with probiotic Bacillus coagulans Unique IS-2 (US).

| Purchase Intelligence | This Product | Fruit Snacks - USA 2017+ |
|-----------------------|--------------|--------------------------|
| Instant Reaction | 59%* | 42% |

Highest Performing Attribute Based on Perception



Apple Sauce + Probiotics Pouches received a high rating when it comes to Healthy. 74.0% of consumers believe products in Apple Sauce + Probiotics Pouches are Healthy.



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The Power of Berries



Rostaa Gourmet Berrylicious Mix

contains mixed berries which claim to be "a fantastic source of antioxidants...rich in fiber, and minerals...high in anti-inflammatory properties, and also a boost to immunity". The product can be consumed as a snack or added to cereals, yogurt, fruit salads and ice creams.

Del Monte Foods Strawberry Fruit Crunch Parfait comprises a coconut creme parfait with strawberry, apple, and granola. The non-dairy product provides one serving of fruit, contains 2 billion probiotics per serving, and is free from artificial flavors and sweeteners.





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Probiotics Have the Potential to Improve Immune Function

Prebiotics, for example inulin, dietary fibers and polysaccharides, have the ability to increase cytokine secretion and the activity of natural killer cells, thereby boosting immune response.

Kyonggi University Industry-Academic Cooperation Foundation and K-Medicoop Co have a pending patent for the use of glucan with a specific structure as an immunity enhancing ingredient in food and pharmaceuticals.

A pending patent by Sandol Food Co. covers the use of corn-derived polysaccharide as an immunity-enhancing agent in food and pharmaceutical compositions. The claimed polysaccharide has the ability to enhance cytokine secretion and the activity of natural killer cells.

BK Bio Co. and Chungnam National University have granted patents that cover the use of broccoli polysaccharides, red cabbage polysaccharides, and kale polysaccharides as immune-boosting ingredients in functional food and drinks.



Mali Ong Banana Sheet (Thailand)

Charm & Competence Mali Ong Banana Sheet is made with selected Mali-Ong banana from the Sukhothai province of Thailand. The 100% natural banana sheet has been prepared using solar powered parabola dome. According to the manufacturer, benefits of Numwah banana are: ripe banana fruits have mild laxative properties due to high watersoluble pectin, is said to increase fiber in the gastrointestinal tract; fiber helps boosting gut bacteria and is a natural source of prebiotics which is known to improve the digestive system



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