

# Emerging Opportunities for Immune Health

**Immune health concerns consumers globally. Increasingly stressful and busier lifestyles, polluted environments and unhealthy diets are contributing to an increase in health concerns related to poor immunity.**

In an era of heightened health consciousness, consumers are becoming aware of the impact of immunity to their overall wellness and are starting to take action.

**Consumers are acknowledging the importance of supporting their immune health.**

**1 in 4**

consumers globally consider their immunity poor to very poor

**67%**

recognize the link between immune system and overall health

**1 in 3**

consumers globally claim to suffer health problems in the last twelve months that have noticeably impacted on the quality of their day-to-day life

**66%**

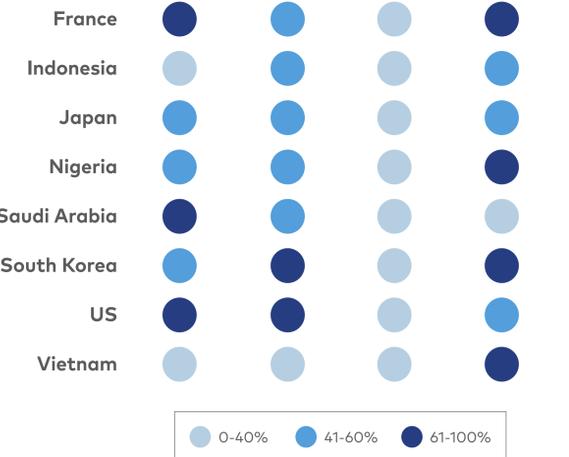
agree that a healthy immune system reduces the risk of illness

**Consumers are taking a proactive approach to support their immunity and are making changes.**

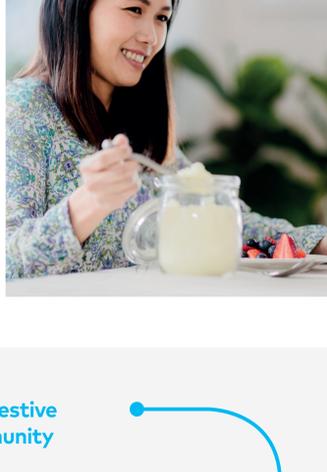
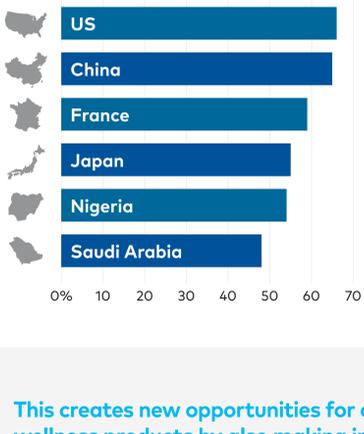
Percentage of consumers willing to purchase products that help boost their immune system, even when they are not suffering from specific health problems.



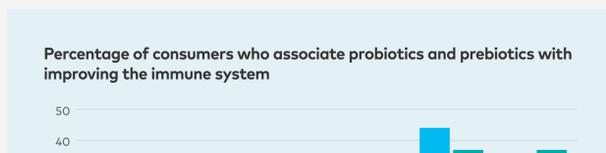
**Managing their diet and promoting self-care (both physically and mentally) are key strategies employed by consumers to support their immune health**



Percentage of consumers interested in food and drink products that aid the immune system



**This creates new opportunities for digestive wellness products by also making immunity support claims.**



Percentage of consumers who associate probiotics and prebiotics with improving the immune system



Percentage of consumers who are willing to pay a premium for products that contain these probiotics and prebiotics\*



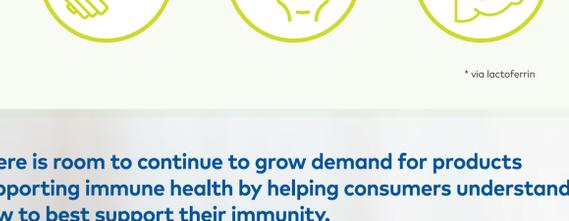
\*among those who associate the ingredient with improving immune system

**Beyond prebiotics and probiotics, other nutrients found in dairy can tap into immunity as an opportunity.**

Percentage of consumers globally who associate the following ingredients with improving the immune system



Percentage of consumers globally who are willing to pay a premium for products that contain the following ingredients



\* via lactoferrin

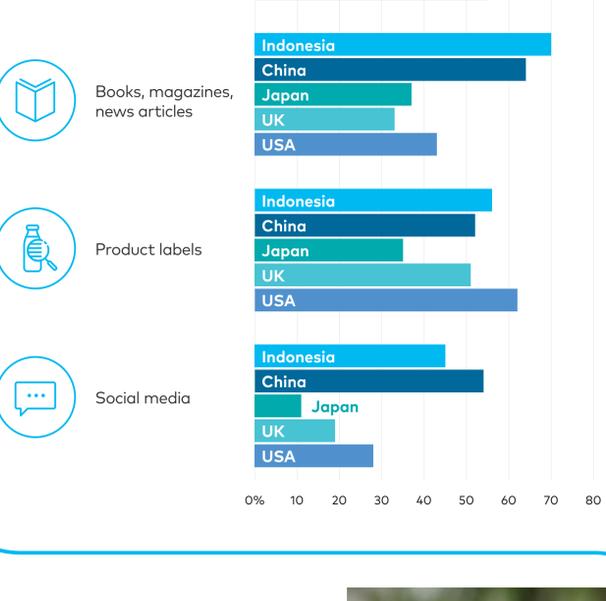
**There is room to continue to grow demand for products supporting immune health by helping consumers understand how to best support their immunity.**

Percentage of consumers who did not take any steps to improve immunity because "I don't know how to"



**Be aware of how consumers source nutrition information to address the information gap**

Percentage of consumers who find nutrition information from different sources<sup>1</sup>



## Opportunities

Consumer awareness on the importance of immune health is growing, but still in early stages. With education and awareness, the immunity market will continue to grow.

Products originally positioned purely for digestive wellness will have yet another avenue to line extend and enter a new benefit area through immunity as consumers correlate the benefits between the two. This can be done by highlighting immunity as an additional benefit or using ingredients like prebiotics and probiotics to create an entirely new category/product offering positioned specifically to address immune health issues.

Beyond probiotics and prebiotics, these opportunities can be replicated in dairy through other nutrients like protein, calcium and iron.

Being an emerging opportunity, it is important that companies support this growing trend through consumer education and awareness of possible solutions that empowers consumers to act.

