

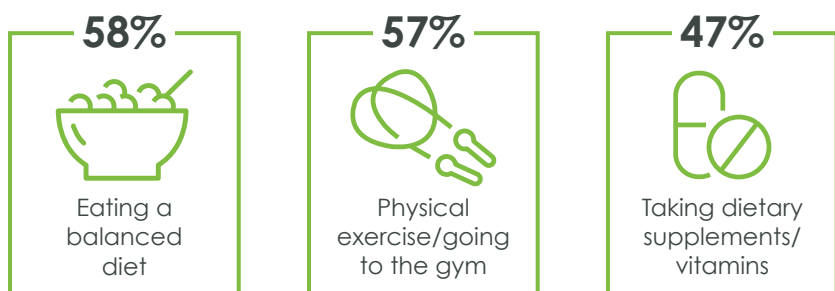
Why are people taking dietary supplements?



DEMAND FOR SUPPLEMENTAL NUTRITION IS STRONG

While diet and exercise are the right tools for people to support their health, research points to consumers' sentiment that that it's not enough.

– Top Ways Consumers Manage Their Health –



Kerry Proprietary Marketing Insights "Proactive Health" 2019

65% of U.S. consumers seek added functional benefits from food and beverages.¹

45% of consumers have purchased functional foods.²

53% of consumers have purchased vitamins and dietary supplements.³

Vital nutrients for immune health

People buy dietary supplements to support specific health outcomes.



49% of consumers take supplements to prevent or treat ailments.⁴



63% of consumers chose immune system support as a reason for purchasing a healthy lifestyle product.⁵

Immune health demand is strong across many of the biggest markets



In the U.S., **53%** say their ideal supplement would support immune health.⁶



46% of consumers in Brazil said they had taken immune health supplements in the past 12 months.⁷



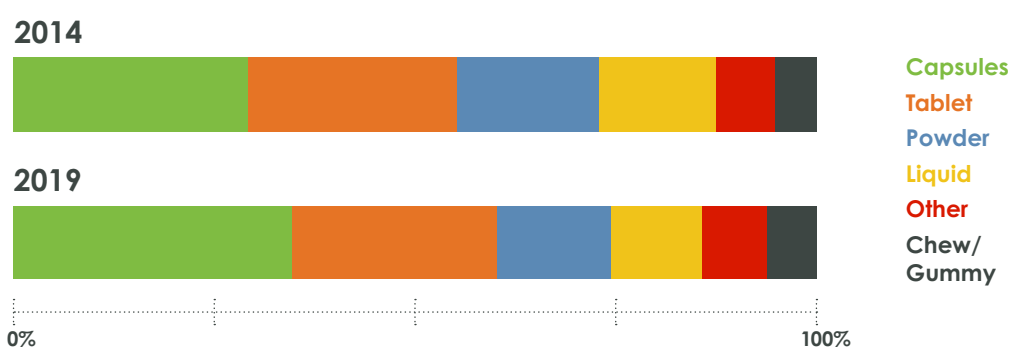
In China, **59%** of health supplement consumers aged between 20 and 59 said they prefer to take health supplements to prevent illness.⁸

Dietary supplement format demands

Consumers are interested in a **variety of formats**, creating **innovation opportunities** for immune health dietary supplements.



Vitamin/Dietary Supplement Product Launches by Format - 2014-2019



BUT RESEARCH IS KEY

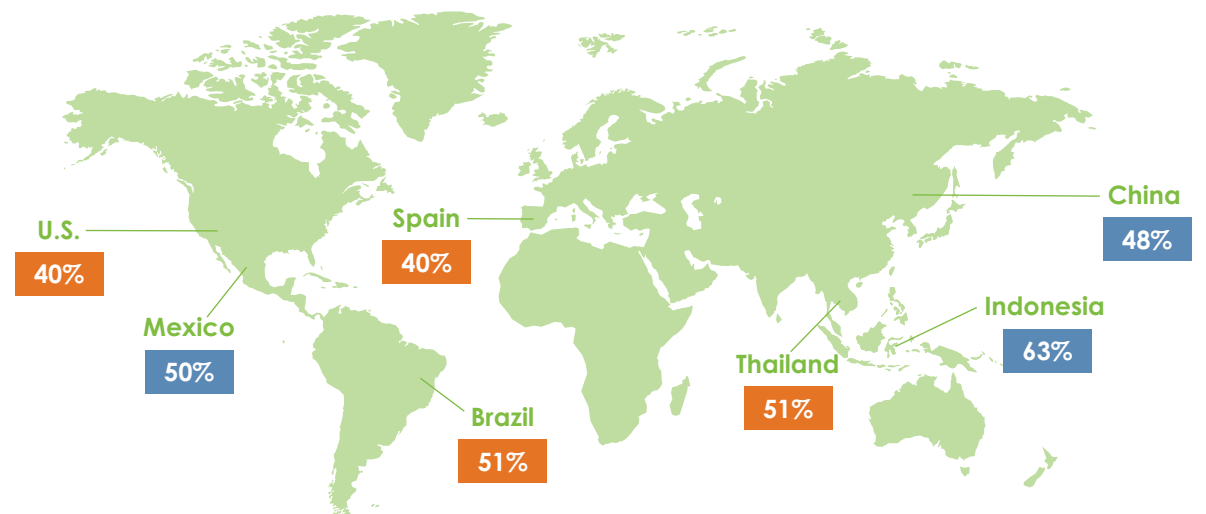
When choosing an immune health dietary supplement, **research on efficacy is important.**

39% of people say that seeing claims based on research or scientific data would make them more likely to buy a healthy lifestyle product.⁹



In Europe, well-recognized 'hero ingredients' are in demand.¹⁰

- % of consumers who want to see the benefits of a healthy lifestyle product explained and supported on the packaging.¹¹
- % of consumers who consider research data to be a top driver for purchases.¹²



How to choose the right immune health ingredient for dietary supplements?

When evaluating an immune health ingredient, focus on the research. Here are some questions to ask:

- ✓ Is the ingredient safe, and how has safety been verified?
- ✓ Has the mechanism of action been explained, defined, or published?
- ✓ Is the ingredient an immune stimulator or immune modulator?
- ✓ How was the clinical study designed?
- ✓ What kind of outcomes were described in the study?
- ✓ Is the ingredient well-characterized?
- ✓ How is serving size determined?
- ✓ What are the formulation characteristics?

With immune health top of mind for consumers, Wellmune is committed to helping food, beverage and supplement manufacturers create safe, efficacious products consumers will value.

Contact us to learn how we can help you meet this growing demand.



1 Kerry, Proactive Health, March 2019
2,3,5,9,10,11,12 Kerry Global Consumer Survey, Digestive & Immune Health, 2019

4 Mintel, Vitamins, Minerals and Supplements
6 Mintel, Supplements, US, October 2019

7 Mintel, Vitamins and Supplements, Brazil, October 2019
8 Mintel, The Future of Vitamins and Supplements, 2019