

Holistic Health, Part 2: Focus on digestive health and immunity



Introduction

There is growing recognition that all aspects of health are interlinked: more consumers are aware of the relationship between the gut, immunity, and brain health, while the beauty-from-within category is benefiting from a shift from an anti-ageing mindset towards a preventative approach. But with consumers sceptical of “magic bullet” solutions, it is not enough to make vague promises about product benefits; brands need to create multifunctional offerings with verified claims.

The Holistic Health Report is written in two parts that will be published throughout 2023. This is part two.





**The push toward
multifunctional
products**

Food makers must get their green credentials in order, but the nutrition story must stack up as well, especially among digitally saturated consumers who are wary of anything sold as a diet-based quick fix.

“The absolutely basic concept of holistic health is consumers recognising that all aspects of health are interlinked and impact on each other, rather than [exist] in isolation,” said Mike Hughes, head of research and insights at FMCG Gurus. “In some developing countries with less job stability and government support, if you're unwell, you might lose your job.”



Yet, “consumers are sceptical of the health and wellness industry”, Hughes added.

“They want to improve their health but they’re also cautious of products positioned as magic bullet health solutions,” he said. “What they want to see is clinically proven claims – it’s not enough any more to say, ‘Here is a juice or a yoghurt, it’s good for your health.’ It’s multifunctional products that are going to really benefit you in 2023 and beyond.

“Consumers want to see these verified claims across a variety of product categories.”

Areas like brain health and cognitive function; the microbiome, digestive health, and the gut-brain axis; immunity; and beauty from within all fit easily under the holistic health umbrella because of the wellness optimisation they promise.

These areas represent key parameters within holistic health in 2023.



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A close-up photograph of a woman with voluminous, curly brown hair. She is holding a white tissue to her nose and sneezing, with her eyes closed and a pained expression. The background is blurred, showing what appears to be an indoor setting with some greenery.

Digestive and immune health

A 2021 survey conducted by NMI found 76% of Americans viewed gut health as important to the health of the whole body – up from 68% in 2020.¹

Three out of four consumers concerned with preventing digestive issues sought out foods and drinks that could also bolster immune function.

Mike Hughes, of FMCG Gurus, noted that there has been recognition of holistic concepts like a broadening understanding of the gut's role in bodily health, even if more specific terms are still broaching the mainstream.

"Many consumers may not have heard of the concept of the microbiome, but they know about these beneficial bacteria in the gut that help them, so it's not an issue of whether they've heard the phrase; it's whether they understand the principle – and increasingly they do," the analyst reflected.

Patent spotting

- 4D Pharma Research Ltd has a pending patent for *Roseburia hominis*, a bacteria species that can be used as a probiotic to improve gut microflora, thereby regulating the innate and adaptive immune system of an individual.
- Morinaga Milk Industry has a pending patent for a food comprising *Bifidobacterium breve M-16V (LMG23729)* in addition to lactulose, raffinose, and galacto-oligosaccharide to promote immune development by increasing the number of T-cells.
- Yakult has a patent for *Lactobacillus Bacillus momentum HY7301*, which produces polysaccharides with immune-stimulating activity in fermented milk products.²

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Deeper awareness is obviously growing. Type #microbiome into Instagram and you'll return 600,000+ posts.

YouTube is awash with microbiome education content, much of it with reference to prebiotics and probiotics, and sometimes extending beyond the gut microbiome to the skin microbiome or the



vaginal microbiome. Meanwhile, the hashtag #Microbiomediet has about 12,000 Instagram posts referencing things like fermented foods, vagus nerve exercises, gut health signalling,

inflammation, diets low in FODMAPs (fermentable oligosaccharides, disaccharides, monosaccharides, and polyols), bacterial vaginosis, and healing the gut.



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A photograph of an elderly woman with short, curly grey hair, wearing a light blue surgical face mask. She is looking out of a window with vertical blinds. She is wearing a grey cardigan over a light blue button-down shirt. The background is slightly blurred, showing the window frame and the blinds.

Holistic health and Covid-19

The Covid-19 pandemic has played its part as well. For many people, it drove home the realisation that compromised diets usually mean compromised immune function.

“Consumers have had the time to step back and re-evaluate with the pandemic,” said Mike Hughes, of FMCG Gurus. “They’ve been able to make changes to their lives and we found something like 44% believe that their health has actually improved in the last two years. Holistic nutrition is a big part of that.

“So even though concern over Covid drops, consumers are committed to improving their health and their lifestyles because they’re focused on the issue of healthy ageing and recognising that all aspects are interlinked.”

The likes of vitamin C, vitamin D, zinc, melatonin, and botanicals such as ginger, ashwagandha, and echinacea have all been significantly boosted by the

pandemic, driving people to seek self-care options around immunity.

According to a 2021 Industry Transparency Center (ITC) survey of US, UK, and German probiotic supplement users, immune function is now the number one reason US citizens consume probiotics, surpassing gut health for the first time.³

In the US, *Nutrition Business Journal* found immunity-focused food supplements surged 51.2% to \$5.2bn in 2020.⁴ Between April 2021 and April 2022, 27% of global

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Stephanie Mattucci, associate director of global food science, Mintel

dietary supplement launches carried an immunity health claim, up from less than 20% five years ago, according to a 2022 supplements-focused report from Mintel.⁵

However, report author Stephanie Mattucci, Mintel’s associate director of global food science, warned that ever-more sophisticated consumers are demanding that immune health products meet their holistic needs.

“As the world learns to live alongside Covid-19, brands will need to go beyond immunity with personalised solutions that protect health holistically,” Mattucci said.

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Old-school holistics



However, displaying the complexity of the modern holistic consumer, a Euromonitor immunity-focused white paper found that global consumers still rank traditional lifestyle choices as having an impact on immunity.

Habits including getting adequate sleep; drinking water; eating fruits and vegetables; and playing sports were rated as having the highest impact on bodily immune function for 50% to 60% of



respondents to the survey.⁶ Meanwhile, taking various dietary supplements; participating in stress reduction activities; eating functional foods; eating legumes and pulses; drinking fruit juices and smoothies; and taking over-the-counter (OTC) medications had a moderate immunity impact for 30% to 40% of those surveyed.

Fewer than 15% of respondents thought these actions had no impact at all on the immune system.

Product spotting: Immunity shots

London-based startup MOJU has a range of botanical and vitamin-based shots aimed at younger consumers seeking gut health and immune benefits.⁷ Front-of-pack (FOP) references include “ACTIVE IMMUNITY”, “VITAL IMMUNITY” or “GUT & IMMUNITY”, all “powered by nature”, with quantities of key ingredients like ginger, turmeric, plant fibre, and vitamin D also listed FOP. The 210 ml, cold-pressed, high pressure processed (HPP) shots also come in 420 ml versions, containing seven shots per bottle to save 60% plastic.

MOJU’s website talks about “keeping our shots as close to their whole, natural form” and how “our functional ingredients are carefully sourced to support a life on the move”. But little information about the provenance of its ingredient supply chain or supporting claims evidence is provided. Its PET bottles use 50% post-consumer recycled material and 100% recycled and fully recyclable card on its other packaging. MOJU donates 1% of its sales to “support grassroots environmental non-profits”.

Holistic immunity foods

There is also a movement toward healthy and functional foods as some consumers experience “pill fatigue”. A 2022 International Food Information Council (IFIC) health survey found that 25% would like to see immunity-boosting benefits from their food, drink, or nutrients.⁸

In a 2022 immunity-focused report, Dutch-Swiss ingredients giant DSM noted opportunities to “educate consumers, introducing them to the plethora of innovative, easy-on-the-palette immunity formulas that are currently being developed”.⁹ DSM noted a convergence of immunity with personalised nutrition.

Mintel patent analyst Neha Srivastava noted in an immunity-focused report that botanicals were moving in on the likes of prebiotics and probiotics, certainly in the number of patents lodged.

The leading countries for granted patents in immunity foods and drinks were China

Product spotting: Cereal immunity

Kellogg’s in the UK markets a variant of its popular cereal Special K with the claim “Immune Support” prominent FOP. The multigrain flake product contains cherry, dark chocolate, and almonds, and is fortified with vitamin D, B6, B12, folic acid, zinc, and iron to “support normal function of the immune system”.¹⁰

(22%), South Korea (15%), US (6%), Japan (5%), and France (4%).

Nestlé, Groupe Danone, Meiji, and Yakult were the most active companies.

The most popular ingredients were botanicals (40%), probiotics (35%), fermented extracts (8%), prebiotics (6%), algae/fungi (6%), insect/animal origin (3%), and vitamins/minerals (2%).

Product spotting: An old herb

Echinacea has long been associated with cold and flu moderation, even if results are mixed in lab situations and authorised claims sparse. A 29-study review did find preventatively taking echinacea could reduce the likelihood of contracting an upper respiratory infection.¹¹ Vital Nutrients Echinacea Extract, at 1,000 mg per pill, delivers a high dosage with no documented safety concerns.





Beauty from within

Beauty from within growth is being driven by a broader shift across the nutraceutical and nutricosmetic space from medicalised/ specialist endpoint, such as heart health or skin health, to more holistic solutions centred around notions of wellbeing and inner and outer beauty.

Global Market Insights (GMI) valued the market at about \$7bn in 2021 and set to grow 8.1% a year to almost double in size to \$13.8bn in 2030.¹²

“Consumers are growing more inclined toward high-quality nutritious or natural products for preventive action against diseases,” wrote GMI in its sector analysis.

“The acceptance of preventive health management practices will provide lucrative growth opportunities for the nutricosmetics market.”

While \$7bn only accounts for a small share of a global beauty and personal care

Product spotting: Green powdered wellness

Super Elixir from Australian company WelleCo¹⁵ is a green powder that is firmly centred on the holistic beauty nexus, claiming to “support real beauty-through-wellness”.

Product literature highlights Super Elixir’s ability to support no less than 11 bodily systems, “from the immune and digestive systems to hair, skin, and nail health”.

The 40-ingredient offering includes a wide variety of botanical extracts (maca, ginger root, green tea, ginseng, psyllium, papaya, pomegranate, spirulina, beetroot, turmeric, and aloe vera, to name a few), mushroom extracts, prebiotics, and probiotics, as well as minerals and antioxidants.

“

I think the beauty-from-within industry has moved away from that concept of anti-ageing and it has benefited from that.”

Mike Hughes, head of research and insight,
FMCG Gurus



market that is worth about \$530bn, according to market analyst Statista,¹³ beauty-from-within products are growing 2% faster per annum than the entire beauty sector.

Product spotting: Moon Juice

Some brands, like Moon Juice,¹⁷ have made beauty from within their commercial core. The Californian wellness company brings “adaptogens, mushrooms, and clinical-level actives into supplements and skincare, with clinically studied, 100% traceable, bioavailable, and potently dosed ingredients”.

It has a four-strong range of supplements targeting inner and outer health. These include SuperYou to “help alleviate the emotional, mental, hormonal, and physical manifestations of stress”; SuperPower for immune function; SuperHair; and SuperBeauty.

“I think the beauty-from-within industry has moved away from that concept of anti-ageing and it has benefited from that,” said Mike Hughes, of FMCG Gurus.

“The prevailing attitude now is there's nothing wrong with getting older and people don't want to be typecast based [on] skin age.

“It's very much about healthy ageing now.”

Market analyst firm Kantar said in a recent report on beauty trends: “It is not a surprise



that there is rising interest in holistic wellbeing.¹⁴

“Within the context of beauty, this is linked to physical and mental health but also to the way we look and our environment.

“Over the last couple of years, we saw the rise of cosmetic procedures and beauty products that overlooked consumers' long-term health (eg peels, acids) and their environment (plastic pollution).”

Kantar added: “Consumers want to enable not only mental but also physical health

through the beauty category.”

The ‘Zoom effect’

The Covid-19 pandemic intensified people’s interest in health and beauty, which was amplified by the “Zoom effect”, with so many screen hours giving us ample time to zoom in on each other’s perfections and imperfections alike.



Another unlikely consequence for the beauty sector came as a result of mask-wearing.

“Unhealthy skin due to constantly wearing face masks and increased demand for skin health supplements due to health consciousness attracted new consumers to opt for beauty supplements,” concluded Mordor Intelligence in a 2022 nutricosmetics report.¹⁶

The turn to natural

The fact that beauty-from-within products often possess natural ingredients like botanical extracts, adaptogens, probiotics, or omega-3s gives another advantage.

Mordor Intelligence observed European cosmetics sector demand for natural ingredients was “visibly increasing due to the growing consumer awareness of natural cosmetics and the initiative of cosmetic companies to replace synthetic ingredients with natural variants”.

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Key takeaways



- **Holistic health messaging can be wishy-washy in a claims sense but evocative in a branding sense. Including ingredients with authorised health claims can help achieve the best of both worlds and overcome consumer scepticism towards industry claims that sometimes seem too good to be true.**
- **Terms like 'the microbiome' and 'gut-brain axis' may not be familiar to many consumers but most have heard about beneficial bacteria in their gut, are increasingly linking this to digestive health, immune health, and more, and are interested in relevant products.**
- **Food supplements and functional foods play an important role in immune health for many consumers – but up to twice as many believe more strongly in simply eating more fruit and vegetables and drinking water.**
- **Beauty-from-within products can tap into the holistic health trend and be positioned beyond more than just wrinkles and skin age; it's also about healthy ageing.**

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