



THE
Wellness
TREND
REPORT
2022

Holland & Barrett

INTRODUCTION



Welcome to the first H&B Wellness Trends report. When it comes to wellness, we've been looking after the nation for over 150 years, and we want to make it a way of life for everyone. From the products we develop, to the passion and knowledge of our colleagues and our commitment to becoming a more responsible retailer, at H&B we constantly look forwards to make sure our customers have everything they need to thrive.

It's fair to say that, for many, putting our health and wellbeing first has been a challenge over the last couple of years. With normal life at a standstill and the regular routines of millions of people turned on their heads, even if we've been fortunate enough to stay well, many of us have felt an absence of 'wellness'.

As we head into 2022, there's an opportunity for our wellness to flourish once again and this report is a first-look at some of the latest wellness trends that can help us do that.

From the hot new ingredients you've not yet heard of, to the latest in diagnostics, our expert team of nutritionists, trend forecasters and product developers have identified the top wellness trends for 2022. These are what make up the inaugural Holland & Barrett Wellness Trends Report.

I hope you enjoy reading it as much as we've enjoyed creating it.

Harvey Bennett,
Customer MD Holland & Barrett

{ Wellness in numbers }



Once viewed as a seasonal interest, wellness is now 'always on', throughout the year*

21%

of British workers started taking vitamin D more regularly during the Covid-19 pandemic**

NEARLY
40%

of people experienced anxiety either for the first time or more severely during the Covid-19 pandemic***

SOURCE: *'In 2021, wellness is always on', thinkwithgoogle.com
** YouGov Vit D Day Survey, 2021 *** Pegasus Game Changers Report, 2020

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Before we look ahead at what's to come in 2022, let us first **look back** on what made our customers tick in 2021

{ A brief look back }



IMMUNITY ON THE MIND

In a year where more than ever before, the strength of our immune systems was at the forefront of our minds, immune-supporting supplements such as vitamin D and cod liver oil were, perhaps unsurprisingly, most popular among our customers.



11%
GROWTH IN SALES OF VITAMIN SUPPLEMENTS LAST YEAR

Crazy for collagen






At H&B we also saw huge increases in collagen sales, with our newly launched H&B Expert range helping to drive that growth, along with welcoming new products from celeb-backed brands like Dose & Co and Revive



10 most searched terms on hollandandbarrett.com in 2021

94%
INCREASE IN SALES OF COLLAGEN WAS SEEN BETWEEN 2020 AND 2021

TOP 5 BESTSELLERS IN 2021

- 1  H&B Vitamin D3
- 2  H&B Cod Liver Oil
- 3  H&B Vitamin C & Zinc Effervescent Orange
- 4  H&B High Strength Turmeric
- 5  H&B Vitamin B12

THE BIG ZZZZZZ

Amino acid-based natural supplements: **5-HTP** and **L-glycine** – the key to quality shut-eye

Not all sleep is created equal. Sedatives, whether that's in the form of a glass of wine or medication, might help you drop off but they disrupt your body's natural rhythms and don't help you get through all the different sleep stages that ultimately end in the important restorative REM stage. So, you're missing out on quality sleep even if you're dozing on and off for 7+ hours.



“AS PART OF THE RANGE EXPANSION OF SUPPLEMENTS COMING IN 2022, L-GLYCINE AND 5-HTP WILL FEATURE HEAVILY. PRODUCED IN THE BODY FROM THE ESSENTIAL AMINO ACID TRYPTOPHAN, 5-HTP IS A PRECURSOR TO SEROTONIN – KNOWN AS ‘THE HAPPY HORMONE’. WE’RE EXCITED TO INTRODUCE OUR CUSTOMERS TO THESE GREAT NATURAL NIGHT-TIME SUPPLEMENTS IN 2022.”

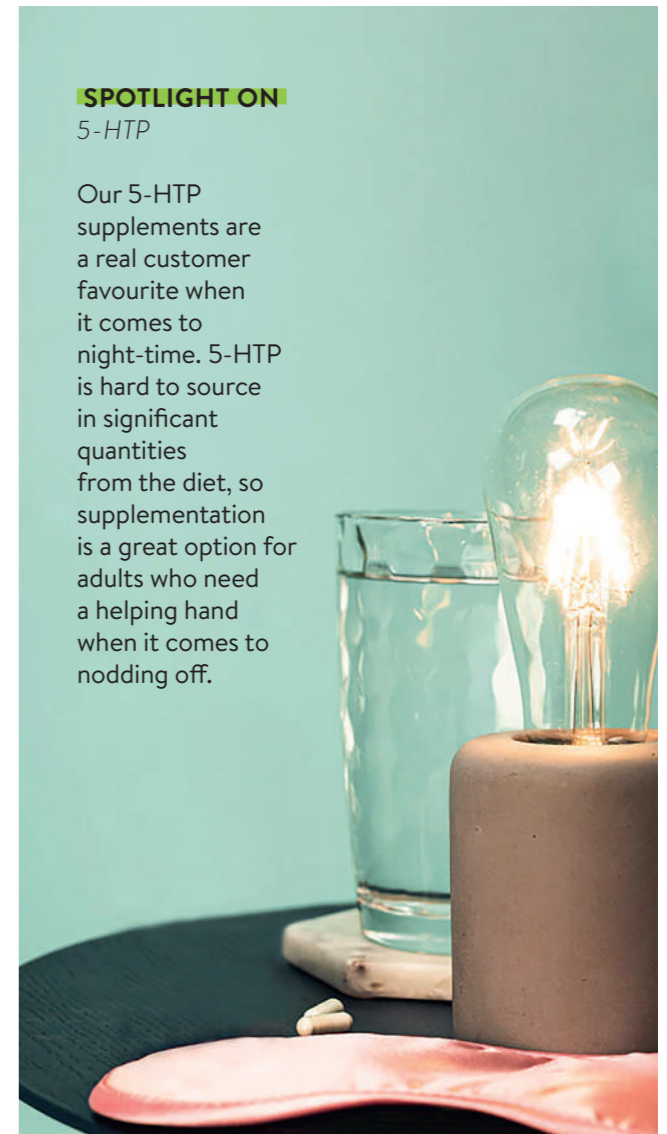
ALEX GLOVER,
SENIOR NUTRITIONIST,
HOLLAND & BARRETT

Natural alternatives work with your body's natural rhythms, and we see this already popular area as one which will grow strongly next year, with L-glycine and 5-HTP set to lead the charge when it comes to the compounds everybody will be talking about.

65% OF THE UK POPULATION EXPERIENCED A SLEEP ISSUE BETWEEN OCTOBER '20 - MARCH '21*

SPOTLIGHT ON
5-HTP

Our 5-HTP supplements are a real customer favourite when it comes to night-time. 5-HTP is hard to source in significant quantities from the diet, so supplementation is a great option for adults who need a helping hand when it comes to nodding off.



SOURCE: * Survey of 1000 UK consumers conducted by Harris on behalf of H&B in March 21



Mango leaf extract is supported by five clinical studies, while Rhodiola rosea has a huge breadth of clinical data across multiple areas of health and wellbeing

ADAPTOGENS



Tension-easing adaptogenics: Introducing **mango leaf extract** and **Rhodiola rosea**



We've seen various plant-based adaptogens steadily growing in popularity over the last few years, in line with the general shift that so many people have taken toward plant-based living.

Adaptogens are plant-based substances found in nature that may help the body during stressful times. Adaptogens such as ashwagandha have enjoyed widespread interest in recent times, supported by some convincing evidence.

Two adaptogens likely to become more popular are mango leaf and Rhodiola rosea. Like ashwagandha, both have some exciting research to support their use during emotional times, and at a time when our care and concern around mental health and wellbeing rightly continues to grow, this is another welcome trend.



The adaptogenic qualities of Rhodiola rosea are linked to its ability to positively influence the HPA axis, the body's central stress response system. Mango leaf extract interacts with an enzyme called COMT, which helps the body control levels of neurotransmitters such as dopamine



"PLANT-BASED ADAPTOGENS ARE DERIVED FROM CERTAIN HERBS OR MUSHROOMS. THEY CAN HELP TO MODULATE LEVELS OF HORMONES LIKE CORTISOL AND ADRENALINE, WHICH, WHEN CHRONICALLY ELEVATED, CAN LEAD TO FEELINGS OF TENSION."

ALEX GLOVER, SENIOR NUTRITIONIST, HOLLAND & BARRETT

Postbiotics

If you want to supercharge your regime, look out for the new **'biotic'** on the block: **postbiotics**



Set to make their debut on the high street in 2022 after years of discussion in nutrition circles, Holland & Barrett is launching its very own range of 'Tri-biotics' – one of the first supplements that contains all three stages of the biotic journey.

With a sales increase of nearly 10% across the gut health range in the last year, this latest addition is sure to pique customer interest and introduce yet more people to the benefits of biotics.

Our friendly bacteria range currently stands at

59

products and counting.

"WE BELIEVE IT'S REALLY KEY TO SUPPORT THE DEVELOPMENT OF A DIVERSE MICROBIOME FROM BIRTH. OUR MOST ADVANCED BIOTIC GUT HEALTH RANGE, WHICH WE'RE EXCITED TO LAUNCH IN 2022, FEATURES ADVANCED TRIPLE BIOTICS, SPECIALLY FORMULATED FOR BABY MICROBIOMES."

GERALDINE WATERTON, HEAD OF BRAND, HOLLAND & BARRETT

SPOTLIGHT ON HOLLAND & BARRETT TRI-BIOTICS



In 2022 we'll welcome our most advanced Biotic Gut Health range. With products for different wellness needs – including immunity, mental balance and women's intimate health – each has its own tailored blend of friendly bacteria strains based on the results from clinical studies.



{TREND}

COLLAGEN+

Collagen complementing **lycopene** and **ceramides**: The next beauty from within frontier



Beauty from within is a trend that shows no sign of abating and in 2021 ingestible collagen went stratospheric. Holland & Barrett has been at the forefront of the ingestible collagen boom over the past year, having developed our own collagen range alongside products from hot new brands including Dose & Co, Revive and NeoCell.



“THE NEXT PHASE IN THE BEAUTY FROM WITHIN REVOLUTION IS THE EXTENSION OF INGESTIBLE COLLAGEN PRODUCTS TO INCLUDE CLINICALLY STUDIED BEAUTY ACTIVES, SUCH AS LYCOPENE AND CERAMIDE EXTRACTS. LYCOPENE IS A POWERFUL ANTIOXIDANT – AND ALSO HAPPENS TO BE WHAT GIVES TOMATOES THEIR RED COLOUR. CERAMIDES ARE FANTASTIC FOR HELPING TO LOCK IN MOISTURE, AND COMBINED WITH THE EFFECTS OF COLLAGEN, OFFER SOME REALLY EXCITING RESULTS.”

SOPHIE ROSE,
TRADING DIRECTOR,
VITAMINS & SUPPLEMENTS,
HOLLAND & BARRETT

We see the category going from strength to strength in 2022, with new actives being added to the great benefits collagen has to offer – what we think of as ‘Collagen+’. In particular, we’re excited about the potential benefits of combinations of collagen with lycopene and ceramide extracts.

SPOTLIGHT ON
HOLLAND & BARRETT
EXPERT LIQUID COLLAGEN



How you look on the outside is often a good indicator of your overall health. Liquid collagen supplements can help to nourish you from the inside out, with their high-strength daily dose of collagen, vitamins and minerals. Our H&B Expert Marine Collagen Liquid Sachets feature our most advanced and clinically studied liquid, Verisol® collagen, to support the appearance of wrinkles and your skin’s elasticity.

{ The growing trend }

22% increase in sales of ingestible collagen products in the last 12 months at H&B

68% overall increase in sales of all beauty supplements over the past three years

THE KOMBUCHA

Fermented supplements:
The next step in the kombucha revolution



REVOLUTION



Fermentation has been a huge trend over the last few years. Kombucha, sauerkraut and kefir have gone from niche products to mainstream food and drink found in fridges across the nation. But therein lies one of the challenges to regularly incorporating the benefits of fermentation in your diet: they need to be kept in the fridge.

Research into how to incorporate the benefits of fermented nutrients into supplements is snowballing. H&B has been working behind the scenes to bring a quality kombucha supplement to the market and continues to expand both our knowledge and range when it comes to all things fermented.



“THERE ARE TWO TYPES OF FERMENTATION: ONE THAT HAPPENS OUTSIDE THE BODY, WHICH IS CALLED EXOGENOUS, AND ENDOGENOUS, WHICH REFERS TO FERMENTATION PROCESSES THAT HAPPEN INSIDE THE BODY. EXOGENOUSLY FERMENTED PRODUCTS LIKE SAUERKRAUT AND KOMBUCHA ARE THOUGHT TO PLAY A ROLE IN DIGESTION, WHEREAS ENDOGENOUS FERMENTATION LEADS TO THE CREATION OF POSTBIOTICS IN THE GUT.”

ALEX GLOVER, SENIOR NUTRITIONIST,
HOLLAND & BARRETT

60% year-on-year increase in sales of fermented food products such as kombucha at Holland & Barrett



2022 will see H&B welcome nutritionally complete ranges from the likes of Huel, YFood, PhD and many more...



ON-THE-GO Nutrition

Complete nutrition:
The solution for lives lived 'on-the-go'



DID YOU KNOW?
The global complete nutrition products market size is expected to reach \$6.3 billion by 2028*

Following the collective pause for breath brought about by the pandemic, we are now seeing life return to what we were all used to pre-Covid. More and more of us are looking for no-regrets, on-the-go meal choices. We want to know exactly what we eat, even if we're too busy for sit-down meals.

2022 will see Holland & Barrett launch our newest category, introducing customers to an exciting new selection of nutritionally complete products from a number of leading brands. As a high street leader in sports powders, H&B aims to become the natural destination for customers looking for on-the-go solutions that are as healthy and tasty as they are convenient.



“THIS IS A SUPER EXCITING NEW CATEGORY FOR US HERE AT H&B AND HOPEFULLY FOR OUR CUSTOMERS, PARTICULARLY AS LIFE IS CONTINUING TO SPEED BACK UP AND MORE OF US ARE IN NEED OF QUICK, EASY AND NUTRITIOUS MEAL OPTIONS.”

GERALDINE WATERTON, HEAD OF BRAND, HOLLAND & BARRETT

SOURCE: *Complete Nutrition Products by Grand View Research

NUTRIENT

BIO HACKING

Nutrient bio-hacking: The rise of nutrient testing and diagnostics

Once the domain of elite athletes, over recent years the 'quantified self' movement has become mainstream, with devices to track everything from sleep quality and heart rate to number of steps taken per day. The data these devices provide us has become increasingly important in helping us improve our wellbeing. Bio-hacking represents the next evolution in the movement.

15.5% expected annual growth in the nutrigenomics market worldwide over the next five years*

*SOURCE: Mordor Intelligence

Constantly evolving, bio-hacking can fundamentally be seen as the practice of trying to change your chemistry or physiology by what you put into your body, or what external factors you expose your body to.

One of the most accessible forms of bio-hacking is nutrigenomics, which looks at the effect food has on the expression of certain genes and genetic pathways and in turn, how our genes affect the nutritional environment.



“WE’RE SET TO SEE A RISE IN NUTRIENT TESTING AND DIAGNOSTICS IN 2022. AT H&B, WE’VE BEEN TRIALLING AN EVIDENCE-BASED PINPRICK BLOOD TEST TO HELP PEOPLE UNDERSTAND THEIR GUT MICROBIOME BETTER, WHICH IS AN IMPORTANT DEVELOPMENT IN OUR JOURNEY TO HELP OUR CUSTOMERS UNDERSTAND THEIR HEALTH FROM THE INSIDE OUT, AS BEST AS POSSIBLE.”

SOPHIE ROSE, TRADING DIRECTOR, VITAMINS & SUPPLEMENTS, HOLLAND & BARRETT

SPOTLIGHT ON

MUHDO DNA + EPIGENETICS GENETIC COLLECTION KIT

One of our popular existing products in the diagnostics range, the Muhdo kit is a DNA and biological age health kit with interactive mobile app. The analysis of your saliva swab uncovers your genetic dispositions to a whole range of health issues, helping you make informed adjustments to your diet, nutrition and lifestyle.





CONTACT THE H&B PRESS TEAM

PR@Hollandandbarrett.com
01273 094 676

