

THE Wellness TRENDS REPORT 2023



Holland & Barrett

INTRODUCTION



Welcome to the latest H&B Wellness Trends Report. In 2022, we've seen our customers turning to health solutions to help them through the aftermath of the pandemic, with a focus on sleep, mental wellness and getting back to the gym. We all know about the healthcare backlogs caused by COVID, so we're seeing a move towards preventative health and a rise in awareness of under-served healthcare needs, while the personalisation and tracking of wellness is becoming even more attainable.

We've always been famous for making new trends accessible, from CBD and collagen to free from and vegan foods – and now our customers expect us to be a leading voice on wider wellness issues, too. At H&B, we're championing these needs by providing services, diagnostics and personalised solutions to manage our customers' health goals.

Looking ahead to 2023, our dedicated team of expert nutritionists, trend forecasters and innovators have picked the ingredients, products, services and behaviours that everyone will be talking about – and trying – in the coming year.

You can expect plenty of exciting new trends but as everyone tightens their belts, arguably the biggest trend will be finding great value products and advice that make a real difference. We'll play our part by applying 150 years of expertise to continue to bring wellness for all to 2023.

I hope you enjoy reading the report.

April Preston,
Global Product Director, Holland & Barrett

{ Wellness in numbers }

48%

of UK people are prioritising their health and wellness because they want to bolster their immune system to ward off illness and disease*



\$4.4 TRILLION

is how much the world wellness economy is worth. It's set to reach \$7 trillion by 2025**

80%

of people plan to keep up, or increase, their health and fitness spending despite the financial squeeze***

SOURCES: *www.mindbodyonline.com/en-gb/business/education/blog/7-uk-wellness-trends-watch-2022 **Wellness Estimates, The Global Wellness Institute, 2022 globalwellnessinstitute.org/press-room/statistics-and-facts/ ***Accenture, September 2022 newsroom.accenture.com/news/consumers-see-health-and-well-being-as-essential-spend-category-accenture-survey-finds.htm



Contents

4

What was #trending in 2022?

First, a recap on the wellness trends we've seen this year

6

Sync your sleep

How to get quality ZZZs naturally, plus the ultimate supps for sound snoozing

8

Back to our roots

Why we should make room for functional mushrooms and other adaptogens – your health will thank you for it

10

Go with your gut

Fermentation reimaged, plus seed spreads and chia seed milk – how we'll eat in 2023

10

11

Wellness tech gets personal

From personalised nutrition to tracking carbon levels to determine metabolic function, how we're using health tech in the coming year

12

The return of Ayurveda

How ancient healthcare traditions are getting a fresh spin, backed by science

13

The rise of eco-conscious collagen

Glow-boosting benefits without the guilt? Step forward vegan collagen – plus other ingredients for natural beauty from within

14

Women's wellness

It's finally in the spotlight and it's all about good health from first period to last period – and beyond

{#trending in 2022}

Before we dive into 2023's trends, we **look back** at what our customers loved this year



WELLNESS, ACCORDING TO TIKTOK

From #selfcare to #seamoss, through to #vegan #cleanbeauty and #sleeptips, billions of people have turned to the social media platform for health inspiration this year.

59% INCREASE IN SALES
OF COLLAGEN AT H&B
IN THE LAST YEAR

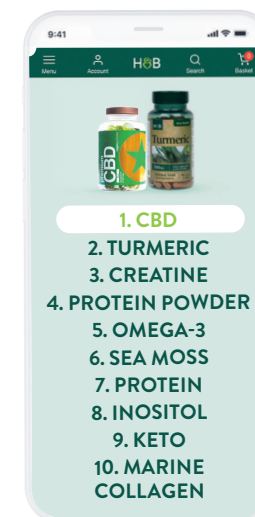
TOP 5 SEARCHED-FOR ARTICLES ON H&B'S HEALTH HUB

1. Sea moss health benefits
2. 9 expert-approved benefits and uses of apple cider vinegar
3. What are the best CBD gummies?
4. 9 ways to get rid of phlegm
5. Natural ways to support arthritis



*Bestselling H&B own-brand products

10
most searched
terms
on hollandandbarrett.com in 2022



24%
GROWTH IN OUR SALES
OF PRODUCTS SUPPORTING
EYE HEALTH BETWEEN 2021 AND
2022, THANKS TO INCREASED
SCREEN TIME AND WFH

Sporting chance

Our sports supplements, bars and drinks were H&B's fastest-growing category in 2022 as customers reclaimed their fitness routines post-pandemic.

TOP 5 BESTSELLERS IN 2022*

1. H&B Cod Liver Oil ↑
2. H&B High Strength Turmeric ↓
3. H&B Slow Release Vitamin B12 ↑
4. H&B Vitamin D ↓
5. H&B Magnesium ↑

↑↓ Chart movements from 2021 list

We explore **four ways** to **sleep fitness** including supps to snooze to and the rise of natural sleep-fit routines

Sync your sleep



1 CIRCADIAN EATING: That means going easy on heavy evening meals and instead turning to late afternoon 'light' eating to help aid digestion before bed, particularly in the winter months.

2 THE GREAT SWITCH-OFF GOES MAINSTREAM: Switching off the TV earlier in the evening? Yep. Leaving our phones out of the bedroom? Yep. Using our tech wisely before bed is already common practice for some and it will become the norm, as we recognise that bright screens can result in 'lightmares' that delay us from dropping off.

3 SUPPS FOR SLEEP: Vitamin D and magnesium are well-known for the role they play in sleep. Meanwhile, new ingredients on the block for 2023 include glycine, spearmint and plant polyphenols, EGCG and L-Theanine, which can help aid deeper sleep, lead to fewer disturbances and more alertness when morning comes.

4 SEE OFF ORTHOSOMNIA: This is the name given to the worry about getting enough sleep – and customers are keeping it at bay with natural remedies like lavender, camomile and CBD. In fact, CBD was our most-searched term on the H&B website in 2022.

SPOTLIGHT ON

H&B EXPERT GOOD NIGHT SLEEP TABLETS



Our sleep supplement contains clinically studied daily Zz, a blend of spearmint polyphenols and L-Theanine, which has been shown to modulate GABA, and acetylcholine, a key neurotransmitter for restorative and good quality sleep. Plus there's also magnesium and Montmorency cherry.



“THERE ARE MANY REASONS FOR SLEEPLESS NIGHTS, FROM COST OF LIVING WORRIES TO STREAMING GIANTS COMPETING FOR OUR NIGHTLY SCHEDULES, SO RESEARCHING AND IMPLEMENTING A PERSONAL SLEEP ROUTINE WILL BE ESSENTIAL IN 2023. WE’LL SEE A RISE IN THE DEVELOPMENT OF TECHNOLOGIES, MEDICINES AND WELLNESS SOLUTIONS THAT HELP US TO REALIGN WITH OUR INTERNAL CIRCADIAN CLOCKS.”

ALEX GLOVER,
SENIOR NUTRITIONIST,
HOLLAND & BARRETT

Say goodbye to generic sleep solutions. We'll be using smart tech to sync to our circadian routines, carefully timing our biological clocks for regular daylight and dark exposure.

{ Snooze stats }



2 IN 3

people have had poor quality sleep in the last six months*



9.5%

growth in sales of our Sleep and Calm ranges between 2021 and 2022

SOURCE: *Holland & Barrett customer research

Back to our roots

From functional mushrooms to underwater finds – these are the **new ingredients** for great health

Mushrooms are having a moment. Supplements, extracts and mushroom-derived beverages are set to surge in popularity in 2023.

This ‘shroom boom’ is partly down to wanting to eat more sustainably – the growing demand for vegan and plant-based meat alternatives will see the likes of button and shiitake mushrooms as desirable meat substitutes that also pack a real flavour punch.

We’ll also see fermentation technology in the spotlight as a growing tribe of start-ups transform fungi into meat-free protein used in animal-free meat and dairy products.

ONES TO WATCH



SUPERFOOD SPRINKLES

From earthy fungi to underwater finds, nutrient-packed sprinkles

go mainstream as we

turn to microalgae and water-based plant protein. Spirulina, the algae superstar, is back – expect to see it added to smoothies and raw juices. It’s highly nutritious and some studies show that it may improve cholesterol and reduce blood pressure.

\$47.2bn

DID YOU KNOW? The global functional mushroom category is predicted to soar from \$24.9bn in 2022 to \$47.2bn by 2028.*

SOURCE: *The Grocer, 2022



“WE’LL BE EATING THE RAINBOW WITH PLANT-BASED FOODS, FUNCTIONAL MUSHROOMS AND ADAPTOGENS – ALL OF WHICH CAN HELP YOUR BODY DEAL WITH STRESS. PEOPLE ARE MOVING TOWARDS FOODS THAT MULTI-TASK – FROM HELPING TO RELIEVE STRESS, TO HELPING WITH BETTER SLEEP AND RELAXATION, ENERGY AND IMMUNITY.”

RACHEL CHATTERTON,
HEAD OF FOOD DEVELOPMENT,
HOLLAND & BARRETT



SPOTLIGHT ON



LION'S MANE:

This tufty mushroom that looks a bit like a lion's mane is a winner when it comes

to supporting your general wellbeing. What's more, there's evidence that it may help support brain, heart and gut health.



DUCKWEED:

That's right, those tiny green plants you see floating at the top of ponds are

set to become a superfood staple. Duckweed is commonly eaten in south-east Asia – it's sustainable and very high in protein. Coming to a table near you...



SEA MOSS:

This seaweed superfood continues to grow in popularity, thanks to its

potential wellness benefits, from supporting digestive and thyroid function, to skin nourishment and mood-boosting qualities. Look out for H&B Sea Moss Gel launching in 2023.

Go with your gut

Fermentation gets a reboot for 2023 – plus four other ways we'll be **changing what we eat** next year

1 FERMENTATION IS BACK

But this time it's about a new approach to packing natural products with flavour. Meanwhile, brands are choosing eco- and health-conscious ingredients such as legumes, grains and classic root vegetables. These ingredients are turning up in high-protein, hardworking multi-tasking formats, as we expect more from our food than ever.

2 CHICKPEA POWER

Roasted chickpea flour and black chickpeas are being used as protein swaps in pasta and baking.

3 SEED SPREADS

Nudge your nut butters to one side for now – seed spreads are an eco-friendly alternative, with sunflower seed and hemp seed spreads becoming more and more popular.

4 ALT-MILK

Looking for an alternative to oat and almond? Step forward chia seed milk. A nutritionally supercharged option containing omega-3, calcium and MCT (medium chain triglyceride) oil.

5 SNACKIFICATION

As more people move away from set meal times throughout the day snack choices will continue to evolve to cater to changing demand as consumers increasingly seek tasty, nutritional, and sustainable foods to fuel their on-the-go lifestyles. We're also seeing more and more snacks blurring the lines with vitamins and dietary supplements as consumers search for tummy fillers that offer functional benefits too. Snacks are diversifying to target needs ranging from diet-specific hunger-busters to pick-me-up hedonistic moments.



“WE EXPECT FERMENTED FOODS TO MAKE A BIG COMEBACK IN 2023, PROVIDING ‘GOOD’ GUT BACTERIA BUT THIS TIME AROUND THEY’RE GOING TO TASTE DELICIOUS.”

RACHEL CHATTERTON,
HEAD OF FOOD
DEVELOPMENT,
HOLLAND & BARRETT

WELLNESS TECH GETS PERSONAL

Think **personalised nutrition** and AI for health

People are increasingly aware of their immune health as a holistic matter. Age, sex, infection history and genetics can all affect our immune system, while the food we eat, sleep and stress levels, plus microbiome health, can all support our immune responses.

We'll see the medical world putting more focus on metabolic and microbiome health. We expect more breakthroughs in understanding the powerful effects of the microbiome and diet on the immune system and how to apply this knowledge to develop therapies, testing platforms and personalised nutrition models.

From patches tracking dietary biomarkers to using carbon levels in the breath to determine metabolic function, the future is all about using health data for optimum health. Health tech innovation is also becoming more focused on key target groups, such as those suffering from, or at risk of, chronic conditions. And it's not just the preserve of athletes or the young. In Japan and the Netherlands over-60s are trialling nutrition advice based on blood and DNA tests.

SPOTLIGHT ON SPERM HEALTH

Sperm health checks are growing in popularity as a general health marker for men, with advances in technology making it easier for men to monitor. Regular checks for volume, motility and concentration are being used as a marker of vitality and not just fertility. Supplements and changes in lifestyle can help to support sperm health* and we're seeing more social media conversation around this topic.

SOURCE: *Diet and Nutritional Factors in Male (In)fertility, 2020



H&B
MALE SEXUAL
HEALTH

Our H&B Expert Male Sexual Health supplement launched this year containing saffron to support libido, green tea to support blood flow, plus zinc to support testosterone levels.



“AS PRESSURE ON THE UK HEALTH SYSTEM CONTINUES, PEOPLE WILL BE TAKING CHARGE OF THEIR HEALTH. WE PREDICT A RISE IN POPULARITY FOR SIMPLE HEALTH CHECKS CARRIED OUT AT IN-STORE CONSULTATION ROOMS OR AT HOME, BACKED UP WITH ACTIONABLE SUPPORT. AI IS TRANSFORMING HOW INFORMATION IS DELIVERED, THROUGH PERSONALISED VIDEO Q&AS, INFOGRAPHICS OR OLD-FASHIONED ADVICE FROM AN EXPERT IN REAL TIME, IN PERSON OR ON A DEVICE.”

DR TARLOCHAN TOOR,
DIRECTOR OF WELLNESS INNOVATION,
HOLLAND & BARRETT

THE RETURN OF Ayurveda

...and other **health** systems of the **past**. In the coming year, old is the new new

We're seeing a resurgence of interest in remedies and ingredients of the past, with many once dismissed as old wives' tales by Western medicine now experiencing a rise in popularity as they're being combined with scientific scrutiny. Take the ancient Indian medical system of Ayurveda, which believes that health problems happen when our mind, body and spirit are out of kilter. Expect to see much more of natural ingredients which have been at the core of Ayurvedic practice for thousands of years.

Moving east, we're seeing an uptick in Chinese native ingredients such as ginkgo biloba which may support memory function, plus ginseng which can help fight fatigue and stabilise blood sugar levels.

3 INGREDIENTS TO KNOW NOW

1 KSM-66 Ashwagandha: A superior, clinically-studied form of Ashwagandha (a shrub native to India, the Middle East and Africa) which can support emotional balance, relaxation and general wellbeing. Some studies suggest it can bolster our

defences against stress – possibly through reducing the stress hormone, cortisol.

2 Curcumin: The main compound in turmeric supports mobility and flexibility and it's widely used in joint supplements. New research shows this ingredient, used for centuries in Ayurvedic cultures, may help the body counteract the effects of chronic stress.

3 Saffron: Some evidence shows that this Asian spice may improve PMS symptoms.

"WE'RE SEEING ANCIENT WISDOM BLEND WITH MODERN SCIENTIFIC EVIDENCE ACROSS A NUMBER OF TRADITIONAL INGREDIENTS. IT'S AN EXCITING STEP FORWARD IN BEING ABLE TO SUBSTANTIATE THEIR NATURAL EFFECTIVENESS."

ALEX GLOVER, SENIOR NUTRITIONIST, HOLLAND & BARRETT

COMING IN 2023



H&B CALM DAILY SUPPORT: Formulated with Safr'Inside™ a clinically-studied saffron extract which helps support emotional balance.



H&B CALM NIGHT RESET: Made with clinically studied KSM-66® Ashwagandha which supports emotional balance and relaxation. Also contains L-Theanine to support sleep, plus curcumin.

The rise of eco-conscious collagen...

...and other super-charged extracts for **beauty from within**. It's all about eating

natural the look

Collagen's status as a skin-smoothing beauty superhero is here to stay. For 2023, people want their collagen fix to be more sustainable and environmentally friendly – and that means looking beyond marine versions.

The solution? Vegan collagen. New formulations are being engineered to match type 1 collagen – the main form of collagen found in our skin – so the body will recognise them and use them more effectively. How is it done? Through the process of biomimetics, which mimics biology.



THE GLOBAL COLLAGEN MARKET IS SET TO BE WORTH \$5.3 BILLION BY 2026*

ONES TO WATCH

NAD+: This is a molecule found in the body that plays a key role in generating energy in your cells. Levels of NAD+ decline with age so this supp is set to become another pro-ageing beauty routine staple.

There's also a possible link between drinking green tea and protection against ageing skin, plus reduced hyperpigmentation caused by ultraviolet (UV) light. We'll see EGCG become a key beauty buy.

EGCG: This compound is found in green tea and some research shows it may promote longevity and protect against ageing.



"AT H&B, WE'VE LAUNCHED OUR BIO-STRUCTURE COLLAGEN SUPPLEMENTS, FORMULATED WITH A BLEND OF FOUR KEY AMINO ACIDS, SOURCED FROM PLANTS, WHICH HAVE BEEN COMBINED TO SIMILAR LEVELS TO THOSE FOUND IN HUMAN TYPE 1 COLLAGEN. PEOPLE ARE STARTING TO BETTER UNDERSTAND THE BROADER BENEFITS OF COLLAGEN, SO WE'LL ALSO SEE YOUNGER CUSTOMERS USING TYPE 2 COLLAGEN SUPPLEMENTS TO KEEP THEIR JOINTS IN OPTIMAL HEALTH."

GERALDINE WATERTON, HEAD OF VITAMIN AND BEAUTY DEVELOPMENT, HOLLAND & BARRETT

SOURCE: *Collagen Market By Product Type, MarketsandMarkets, 2022

WOMEN'S WELLNESS


Finally part of the conversation, finally on the agenda – and it's **big business**

In 2022, the government launched its first Women's Health Strategy for England. Add in celebrity campaigners and female MPs, TV and social media discussions, and the tide is finally turning: women's health is getting the attention it deserves.

This will ramp up even more in 2023. We'll continue to break down the menopause taboo and we'll become more focused on a range of specific women's health issues, with personalised solutions and femtech founders continuing to help lead the revolution on breaking down taboos around menstrual health, endometriosis, PCOS, fertility, miscarriage and more.

ONES TO WATCH

INGREDIENTS FOR MENSTRUAL HEALTH

 90% of women who menstruate get premenstrual symptoms. There's increasing evidence on the role of gut health and probiotics in addressing those symptoms, as well as supporting vaginal and urinary tract health.

 Meanwhile, nootropics (brain-supporting botanical ingredients) and adaptogens (plant-based substances that can help our body deal with stress) are finding their way into innovative new products for menstrual health.

23%

increase in sales this year of H&B products supporting the menopause



21.9%

How much our pregnancy and fertility range sales are up by this year

SPOTLIGHT ON CYCLE INTELLIGENCE

High-intensity and endurance workouts during ovulation. Gentle walks during the luteal phase (the time frame between ovulation and our period). Gentle movements, restorative and yin yoga when it's period time. Increasingly, we'll be matching the right kind of exercise to the phase of our menstrual cycle – plus seeking out nutrients to support ourselves at different stages of the cycle.



"IMPROVING WOMEN'S HEALTH SITS AT THE HEART OF HOLLAND & BARRETT. FROM THEIR FIRST PERIOD, TO THEIR LAST AND BEYOND, WE'RE HERE TO SUPPORT WOMEN'S HEALTH AND WELLNESS JOURNEYS. EARLIER THIS YEAR H&B ACQUIRED THE FEMTECH BUSINESS, PARLA. THROUGH THIS INNOVATIVE BUSINESS WE'RE OFFERING ONLINE, EXPERT-LED GROUP PROGRAMMES TO HELP WITH CONDITIONS LIKE ENDOMETRIOSIS, POLYCYSTIC OVARY SYNDROME (PCOS) AND INFERTILITY, PLUS MISCARRIAGE, GRIEF AFTER PREGNANCY LOSS AND MENOPAUSE."

FIONA SWENY,
WELLNESS FUTURES SCIENCE
LEAD, HOLLAND & BARRETT

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