

INTRODUCTION



elcome 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 }



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**

 $40^{\%}$

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

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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 bac **IMMUNITY ON THE MIND** In a year where more than ever before, the

1. TURMERIC 2. HONEY 3. CHLOROPHYLL 4. KETO 5. SLEEP 6. MANUKA 7. GINGER 8. CRANBERRY 9. COCONUT OIL 10. OIL

10 most searched terms on hollandandbarrett.com in 2021

SEEN BETWEEN 2020 AND 2021







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.



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





ot 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*



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



ADAPTOGE

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

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

e'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.

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"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**

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

EXCITING RESULTS."

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 }

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

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

KOMBUCHA

Fermented supplements: The next

The next step in the kombucha revolution



ermentation 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.

60%

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

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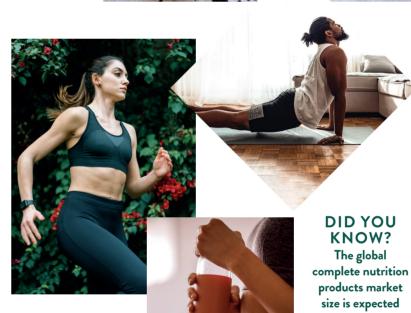
"THERE ARE TWO TYPES OF FERMENTATION:
ONE THAT HAPPENS OUTSIDE THE BODY,
WHICH IS CALLED EXOGENOUS, AND
ENDOGENOUS, WHICH REFERS TO
FERMENTATION PROCESSES THAT HAPPEN
INSIDE THE BODY. EXOGENOUSLY
FERMENTED PRODUCTS LIKE SAUERKRAUT
AND KOMBUCHA ARE THOUGHT TO PLAY
A ROLE IN DIGESTION, WHEREAS
ENDOGENOUS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

ALEX GLOVER, SENIOR NUTRITIONIST, HOLLAND & BARRETT



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





omplete nutritio products market size is expected to reach \$6.3 billion by 2028* ollowing 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: The rise of nutrient testing and diagnostics

nce 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% in m

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.



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