Health and Wellness in Australia

December 2025

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EXECUTIVE SUMMARY

Health and wellness in Australia pivots towards sugar reduction, functionality and credible everyday benefits

INDUSTRY PERFORMANCE

Sugar reduction and metabolic health concerns shape category-wide performance

Functionality, gut health and protein move health and wellness beyond avoidance

WHAT'S NEXT?

Mainstream integration of functional, lower-sugar and clean-label products will drive future growth

COUNTRY REPORTS DISCLAIMER

HW Hot Drinks in Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Functional innovation and clean-label expectations redefine hot drinks wellness

INDUSTRY PERFORMANCE

Functional benefits gain momentum across other hot drinks and tea

Natural positioning remains relevant but increasingly overlaps with premium and sustainable cues

No sugar expands from indulgent powders into more everyday hot drink occasions

WHAT'S NEXT

Functional hot drinks expand into targeted wellbeing, including mental health

Natural hot drinks recover through sharper positioning and stronger value propositions

No sugar becomes more mainstream as taste improves and permissible indulgence grows

CATEGORY DATA

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HW Soft Drinks in Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

The “sugar revolution” accelerates as functional benefits reshape innovation

INDUSTRY PERFORMANCE

Reformulation and functionalisation widen health and wellness appeal beyond carbonates

No sugar consolidates leadership across carbonates, sports drinks and energy drinks

Natural positioning holds up through clean labels, botanicals and “credible” functionality

WHAT'S NEXT

Sugar reduction and benefit-led hydration will drive health and wellness soft drinks growth

No sugar is expected to sustain strong growth as reformulation becomes the default

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HW Snacks in Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Healthier snacking accelerates through protein, portion control and "permissible indulgence"

INDUSTRY PERFORMANCE

Health-conscious snacking broadens from restriction to "better for you" value and taste

Gluten free remains mainstream in savoury snacks, supported by ease of adoption and clear communication

Natural positioning gains relevance as consumers scrutinise ingredients and seek cleaner labels

WHAT'S NEXT

Health and wellness growth will be shaped by protein, healthier impulse occasions and tighter advertising controls

Gluten free is expected to grow steadily as portfolios widen and the claim remains a trusted shortcut

Natural is expected to expand through cleaner formulations and emerging challenger brands

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KEY DATA FINDINGS

2024 DEVELOPMENTS

Digestive health, plant-based nutrition and sugar reduction reshape dairy wellness

INDUSTRY PERFORMANCE

Digestive health and functional positioning drive product development across dairy and alternatives

Good source of minerals remains a strong nutrition cue, supported by fortification in both dairy and plant-based

High protein expands beyond fitness into mainstream “everyday nutrition” consumption

WHAT’S NEXT

Digestive health, nutrient-enhanced plant-based and lower sugar renovation will drive future growth

Good source of minerals is expected to remain relevant, supported by fortification and ageing-related health priorities

High protein is expected to sustain momentum, with growth supported by multifunctional propositions

CATEGORY DATA

COUNTRY REPORTS DISCLAIMER

HW Cooking Ingredients and Meals in Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Health-led renovation accelerates across sauces, oils and convenient meals

INDUSTRY PERFORMANCE

Clearer labelling and reformulation support sugar avoidance and healthier everyday choices

Gluten free becomes an everyday expectation, supported by mainstream innovation and strict compliance

Natural and “less processed” cues gain importance, reinforced by trust and provenance

WHAT’S NEXT

Value-led health innovation will centre on cooking confidence, convenience and “better for you” staples

Gluten free is expected to keep growing through broader formats and more family-friendly innovation

Natural is expected to remain resilient, strengthened by anti-ultra-processed sentiment and transparency demands

CATEGORY DATA

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