



Passport

Weight Management and Wellbeing in Australia

Euromonitor International

October 2021

This sample report is for illustration
purposes only.

Some content and data have been
changed.

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WEIGHT MANAGEMENT AND WELLBEING IN AUSTRALIA - CATEGORY ANALYSIS

HEADLINES

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2021 DEVELOPMENTS

Trend towards healthy, home-cooked meals hampers growth of meal replacement

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Supplement nutrition drinks remains only positive performer in 2021

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Content removed from sample

Herbalife retains overall leadership, while Abbott Australasia continues to gain significant ground in supplement nutrition drinks

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PROSPECTS AND OPPORTUNITIES

Obesity rates in Australia expected to contribute to improving demand for OTC obesity over course of forecast period

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Holistic approach to food to further reduce reliance on weight management

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Supplement nutrition drinks to remain strongest performer

Content removed from sample

CATEGORY DATA

Table 1 Sales of Weight Management and Wellbeing by Category: Value 2016-2021

AUD million	2016	2017	2018	2019	2020	2021
Meal Replacement	Data removed from sample					
OTC Obesity						
Slimming Teas						
Supplement Nutrition						
Drinks						
Weight Loss Supplements						
Weight Management and Wellbeing						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

Table 2 Sales of Weight Management and Wellbeing by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Meal Replacement	Data removed from sample		
OTC Obesity			
Slimming Teas			
Supplement Nutrition Drinks			
Weight Loss Supplements			
Weight Management and Wellbeing			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

Table 3 NBO Company Shares of Weight Management and Wellbeing: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 LBN Brand Shares of Weight Management and Wellbeing: % Value 2018-2021

% retail value rsp
Brand (GBO)

Company (NBO)

2018

2019

2020

2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Forecast Sales of Weight Management and Wellbeing by Category: Value 2021-2026

AUD million	2021	2022	2023	2024	2025	2026
Meal Replacement	Data removed from sample					
OTC Obesity						
Slimming Teas						
Supplement Nutrition Drinks						
Weight Loss Supplements						
Weight Management and Wellbeing						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

Table 6 Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Meal Replacement	Data removed from sample		
OTC Obesity			
Slimming Teas			
Supplement Nutrition Drinks			
Weight Loss Supplements			
Weight Management and Wellbeing			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

CONSUMER HEALTH IN AUSTRALIA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Consumer health in 2021: The big picture

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2021 key trends

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Competitive landscape

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Retailing developments

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What next for consumer health?

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Content removed from sample

MARKET INDICATORS

Table 7 Consumer Expenditure on Health Goods and Medical Services: Value 2016-2021

AUD million	2016	2017	2018	2019	2020	2021
Pharmaceuticals, medical appliances/ equipment	Data removed from sample					
Outpatient services						
Hospital services						
Total						

Source: Euromonitor International from official statistics, trade associations, trade interviews

Table 8 Life Expectancy at Birth 2016-2021

years	2016	2017	2018	2019	2020	2021
Males	Data removed from sample					
Females						

Source: Euromonitor International from official statistics

MARKET DATA

Table 9 Sales of Consumer Health by Category: Value 2016-2021

AUD million	2016	2017	2018	2019	2020	2021
OTC	Data removed from sample					
Sports Nutrition						
Vitamins and Dietary Supplements						
Weight Management and Wellbeing						
Herbal/Traditional Products						
Allergy Care						
Paediatric Consumer Health						
Consumer Health						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

- Note 1: Consumer health total is the sum of OTC, sports nutrition, vitamins and dietary supplements and weight management and wellbeing
- Note 2: Sum of categories is greater than the market size because allergy care is a duplicate of categories found in cough, cold and allergy remedies, dermatologicals and eye care; paediatric consumer health is an aggregate of paediatric categories in OTC and vitamins and dietary supplements; and herbal/traditional products is an aggregate of herbal/traditional categories in OTC and vitamins and dietary supplements
- Note 3: 2021 data is provisional and based on part-year estimates

Table 10 Sales of Consumer Health by Category: % Value Growth 2016-2021

% current value growth

2020/21 2016-21 CAGR 2016/21 Total

OTC
Sports Nutrition
Vitamins and Dietary Supplements
Weight Management and Wellbeing
Herbal/Traditional Products
Allergy Care
Paediatric Consumer Health
Consumer Health

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note 1: Consumer health total is the sum of OTC, sports nutrition, vitamins and dietary supplements and weight management and wellbeing

Note 2: Sum of categories is greater than the market size because allergy care is a duplicate of categories found in cough, cold and allergy remedies, dermatologicals and eye care; paediatric consumer health is an aggregate of paediatric categories in OTC and vitamins and dietary supplements; and herbal/traditional products is an aggregate of herbal/traditional categories in OTC and vitamins and dietary supplements

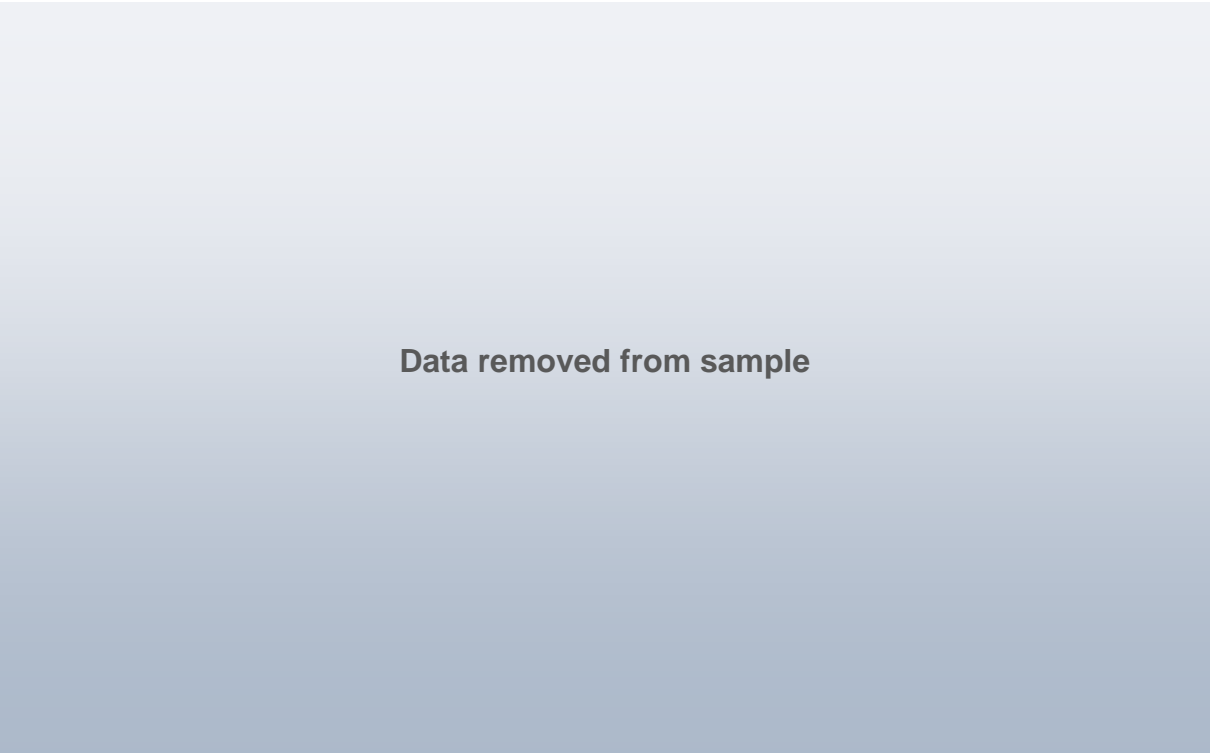
Note 3: 2021 data is provisional and based on part-year estimates

Table 11 NBO Company Shares of Consumer Health: % Value 2017-2021

% retail value rsp

Company 2017 2018 2019 2020 2021

Data removed from sample



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 LBN Brand Shares of Consumer Health: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
Data removed from sample					

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Penetration of Private Label in Consumer Health by Category: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Consumer Health	Data removed from sample					
Herbal/Traditional Products						
OTC						
Paediatric Consumer Health						
Sports Nutrition						

Vitamins and Dietary Supplements	1.2	1.2	1.0	0.8	0.8	0.8
Weight Management and Wellbeing	0.3	-	-	-	-	-

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Distribution of Consumer Health by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Other Grocery Retailers						
---- Healthfood shops						
---- Other Other Grocery Retailers						
- Mixed Retailers						
-- Department Stores						
-- Mass Merchandisers						
-- Variety Stores						
-- Warehouse Clubs						
- Non-Grocery Specialists						
-- Health and Beauty Specialist Retailers						
--- Beauty Specialist Retailers						
--- Chemists/Pharmacies						
--- Optical Goods Stores						
--- Drugstores/parapharmacies						
--- Vitamins and Dietary Supplements Specialist Retailers						
--- Other Consumer Health Non-Grocery Specialists						
Non-Store Retailing						
- Vending						
- Homeshopping						
- E-Commerce						
- Direct Selling						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 Distribution of Consumer Health by Format and Category: % Value 2021

% retail value rsp

	OTC	Sports Nutrition	Vitamins and Dietary Supplements	Weight Management and Wellbeing	Herbal/ Traditional Products	Allergy Care
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Other Grocery Retailers						
---- Healthfood shops						
---- Other Other Grocery Retailers						
- Mixed Retailers						
-- Department Stores						
-- Mass Merchandisers						
-- Variety Stores						
-- Warehouse Clubs						
- Non-Grocery Specialists						
-- Health and Beauty Specialist Retailers						
--- Beauty Specialist Retailers						
--- Chemists/Pharmacies						
--- Optical Goods Stores						
--- Drugstores/ parapharmacies						
--- Vitamins and Dietary Supplements Specialist Retailers						
--- Other Consumer Health Non-Grocery Specialists						
Non-Store Retailing						
- Vending						
- Homeshopping						
- E-Commerce						
- Direct Selling						
Total						
	Paediatric Consumer Health					
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery						

Retailers
 --- Convenience Stores
 --- Discounters
 --- Forecourt Retailers
 --- Hypermarkets
 --- Supermarkets
 -- Traditional Grocery
 Retailers
 --- Other Grocery
 Retailers
 ---- Healthfood shops
 ---- Other Other
 Grocery Retailers
 - Mixed Retailers
 -- Department Stores
 -- Mass Merchandisers
 -- Variety Stores
 -- Warehouse Clubs
 - Non-Grocery Specialists
 -- Health and Beauty
 Specialist Retailers
 --- Beauty Specialist
 Retailers
 --- Chemists/Pharmacies
 --- Optical Goods Stores
 --- Drugstores/
 parapharmacies
 --- Vitamins and
 Dietary Supplements
 Specialist Retailers
 --- Other Consumer
 Health Non-Grocery
 Specialists
 Non-Store Retailing
 - Vending
 - Homeshopping
 - E-Commerce
 - Direct Selling
 Total

**Data
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 from
 sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: OTC = over the counter; SN = sports nutrition; VDS = vitamins and dietary supplements; WMW = weight management and wellbeing; HTP = herbal/traditional products; AC = Allergy Care; PCH = paediatric consumer health

Table 16 Forecast Sales of Consumer Health by Category: Value 2021-2026

AUD million

2021 2022 2023 2024 2025 2026

OTC
 Sports Nutrition
 Vitamins and Dietary
 Supplements
 Weight Management and
 Wellbeing
 Herbal/Traditional
 Products
 Allergy Care

Data removed from sample

Paediatric Consumer
Health
Consumer Health

Data removed from sample

- Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
- Note 1: Consumer health total is the sum of OTC, sports nutrition, vitamins and dietary supplements and weight management and wellbeing
- Note 2: Sum of categories is greater than the market size because allergy care is a duplicate of categories found in cough, cold and allergy remedies, dermatologicals and eye care; paediatric consumer health is an aggregate of paediatric categories in OTC and vitamins and dietary supplements; and herbal/traditional products is an aggregate of herbal/traditional categories in OTC and vitamins and dietary supplements
- Note 3: 2021 data is provisional and based on part-year estimates

Table 17 Forecast Sales of Consumer Health by Category: % Value Growth 2021-2026

% constant value growth

2021/2022 2021-26 CAGR 2021/26 Total

OTC
Sports Nutrition
Vitamins and Dietary Supplements
Weight Management and Wellbeing
Herbal/Traditional Products
Allergy Care
Paediatric Consumer Health
Consumer Health

Data removed from sample

- Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
- Note 1: Consumer health total is the sum of OTC, sports nutrition, vitamins and dietary supplements and weight management and wellbeing
- Note 2: Sum of categories is greater than the market size because allergy care is a duplicate of categories found in cough, cold and allergy remedies, dermatologicals and eye care; paediatric consumer health is an aggregate of paediatric categories in OTC and vitamins and dietary supplements; and herbal/traditional products is an aggregate of herbal/traditional categories in OTC and vitamins and dietary supplements
- Note 3: 2021 data is provisional and based on part-year estimates

APPENDIX

OTC registration and classification

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Vitamins and dietary supplements registration and classification

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Self-medication/self-care and preventive medicine

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Switches

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Summary 1 OTC: Switches 2020-2021

Brand name	Manufacturer	Ingredient/dosage	Switch date
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Source: Euromonitor International from official statistics, trade associations, trade press, trade interviews.

DISCLAIMER

Forecast and scenario closing date: 6 September 2021

Report closing date: 5 October 2021

Analysis and data in this report give full consideration to consumer behaviour and market performance in 2021 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on www.euromonitor.com and via the Passport system, where new content is being added on a systematic basis.

DEFINITIONS

The total market size given for consumer health is the sum of OTC, sports nutrition, vitamins and dietary supplements as well as weight management and wellbeing.

The sum of these categories is greater than actual market size because allergy care is a duplicate of categories found in cough, cold and allergy (hay fever) remedies, dermatologicals and eye care; paediatric consumer health is an aggregate of paediatric categories in OTC and vitamins and dietary supplements; and herbal/traditional products is an aggregate of herbal/traditional categories in OTC and vitamins and dietary supplements.

2021 data are provisional and based on part-year estimates.

Explanations of words and/or terminology used in this report are as follows:

- TGA refers to the Therapeutic Goods Administration
- Daigou: the practice of Chinese people purchasing goods in bulk in countries such as Australia and then privately importing them into China and selling them on through online channels.

SOURCES

Sources used during the research included the following:

Summary 2 Research Sources

Official Sources

Trade Associations

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Trade Press

Other Sources

Content removed from sample

Source: Euromonitor International