



# Passport

## Wound Care in Australia

Euromonitor International

October 2021

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purposes only.

Some content and data have been  
changed.

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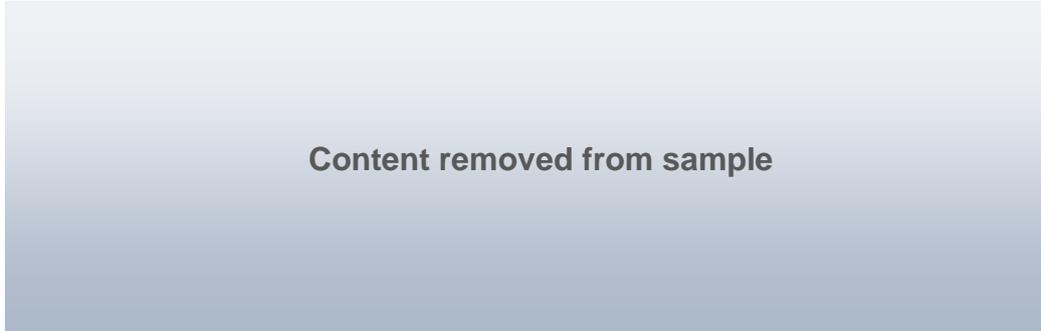
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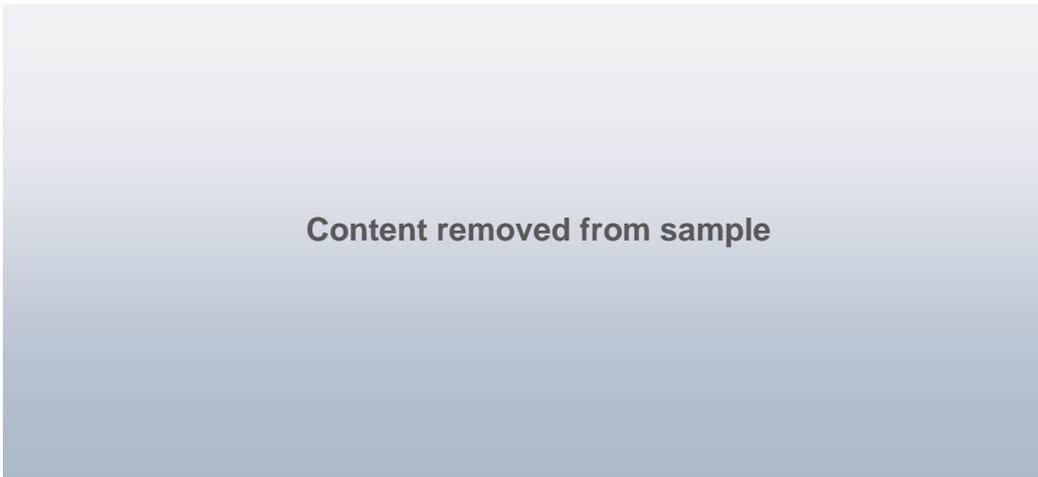
# WOUND CARE IN AUSTRALIA - CATEGORY ANALYSIS

## HEADLINES

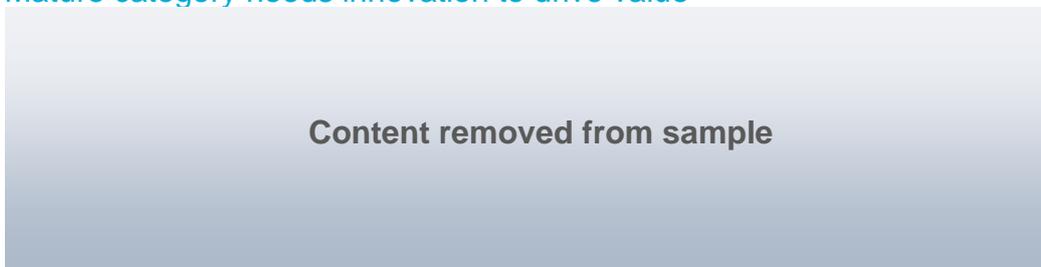


## 2021 DEVELOPMENTS

Return to low undynamic growth rates for wound care in 2021 as  
Australians use accumulated stock



Mature category needs innovation to drive value



## Elastoplast and Band-Aid remain popular trusted wound care brands

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## PROSPECTS AND OPPORTUNITIES

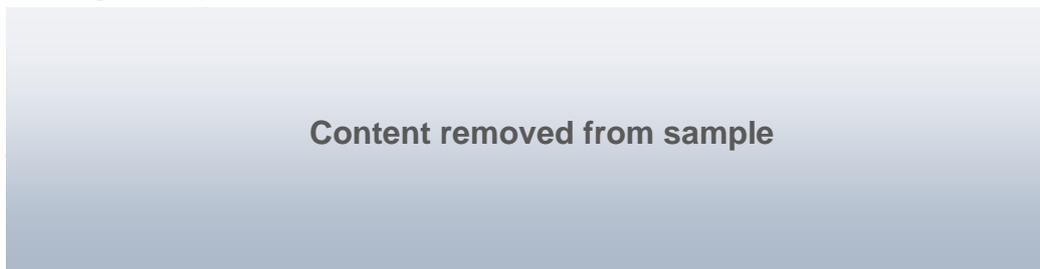
Ageing population to stimulate demand for wound care over forecast period

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Rising number of diabetes patients in Australia contributing factor to demand

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Offering innovative products with natural positioning could offer stronger value growth potential



**CATEGORY DATA**

**Table 1 Sales of Wound Care by Category: Value 2016-2021**

AUD million	2016	2017	2018	2019	2020	2021
- First Aid Kits	<b>Data removed from sample</b>					
- Gauze, Tape and Other Wound Care						
- Sticking Plasters/ Adhesive Bandages Wound Care						

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 Wound Care by Category: % Value Growth 2016-2021**

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
- First Aid Kits	<b>Data removed from sample</b>		
- Gauze, Tape and Other Wound Care			
- Sticking Plasters/Adhesive Bandages Wound Care			

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 Wound Care: % Value 2017-2021**

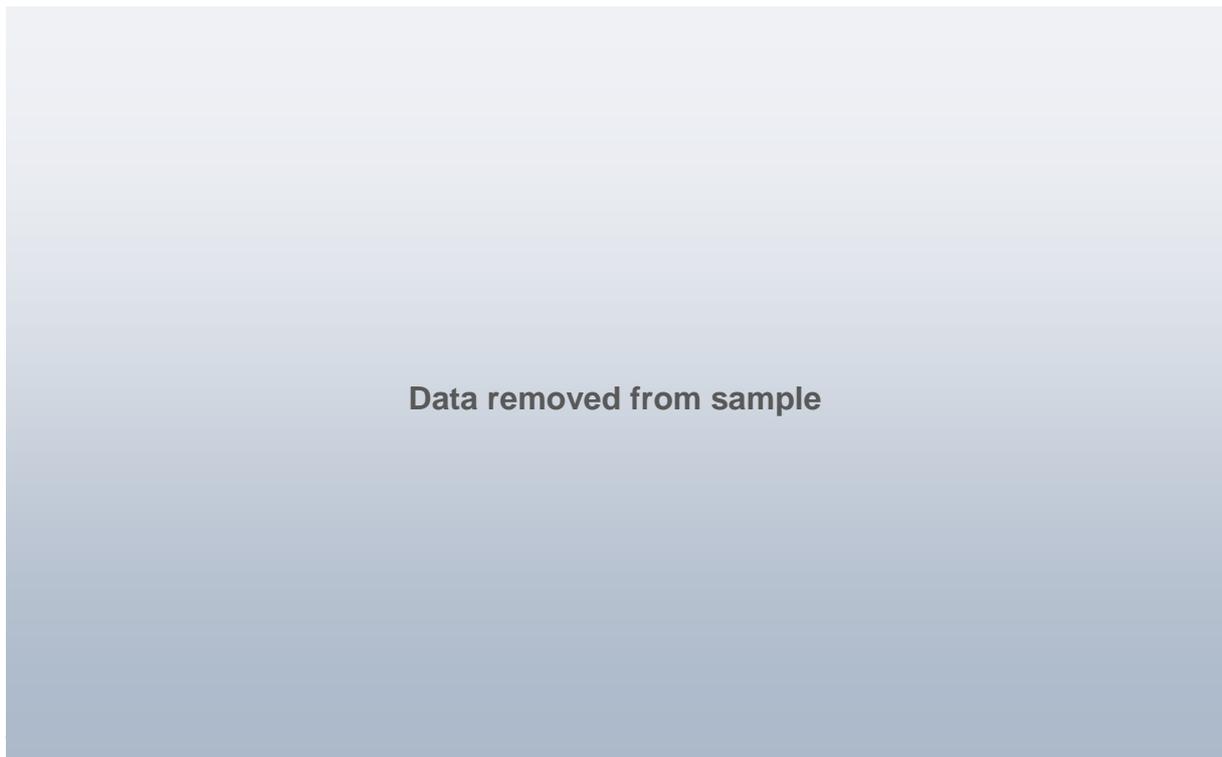
% retail value rsp Company	2017	2018	2019	2020	2021
<b>Data removed from sample</b>					



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

**Table 4** LBN Brand Shares of Wound Care: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 5** Forecast Sales of Wound Care by Category: Value 2021-2026

AUD million

	2021	2022	2023	2024	2025	2026
- First Aid Kits - Gauze, Tape and Other Wound Care - Sticking Plasters/ Adhesive Bandages Wound Care	<b>Data removed from sample</b>					
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					

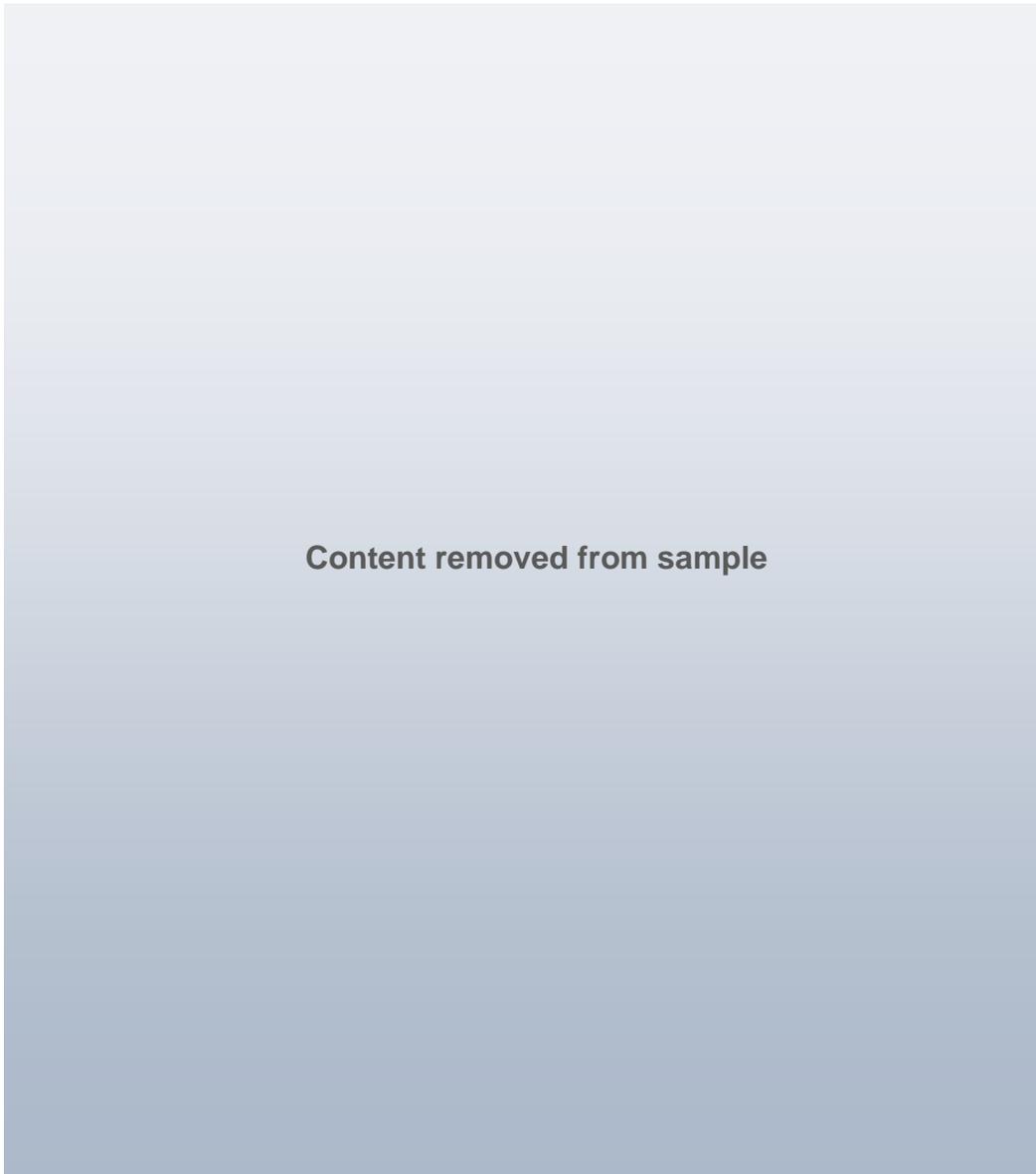
**Table 6 Forecast Sales of Wound Care by Category: % Value Growth 2021-2026**

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
- First Aid Kits - Gauze, Tape and Other Wound Care - Sticking Plasters/Adhesive Bandages Wound Care	<b>Data removed from sample</b>		
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

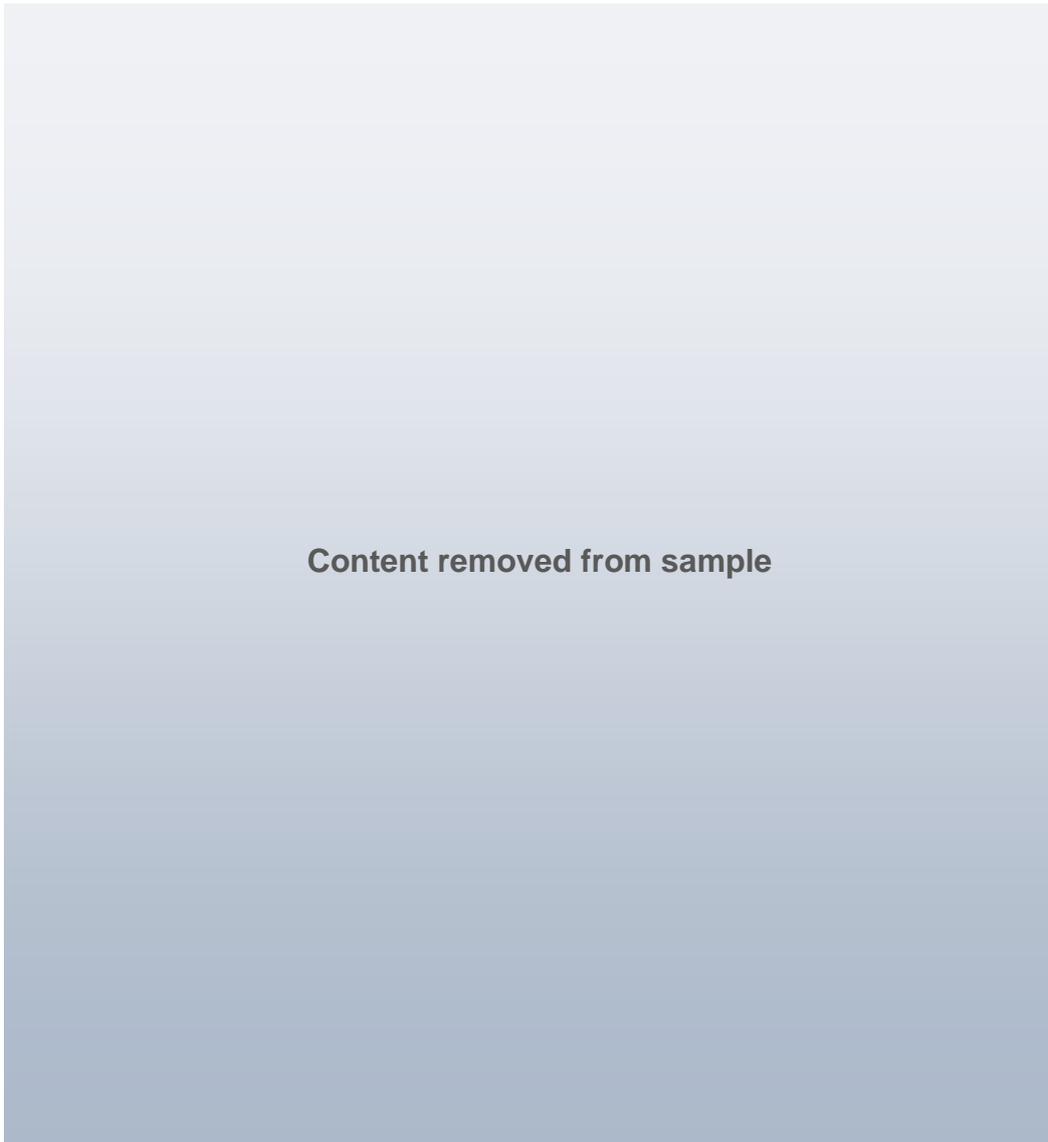
## EXECUTIVE SUMMARY

### Consumer health in 2021: The big picture

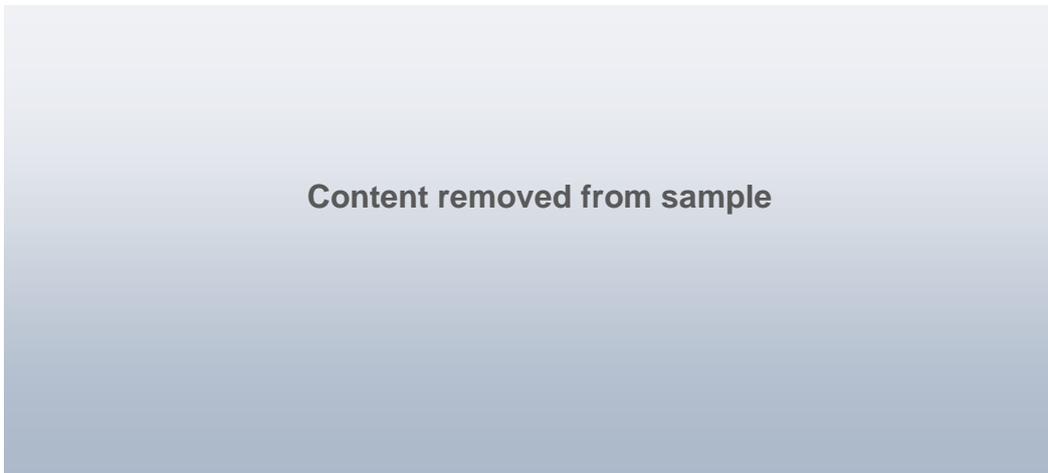


### 2021 key trends





Competitive landscape



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Retailing developments

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What next for consumer health?

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**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	<b>Data removed from sample</b>					
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	<b>Data removed from sample</b>					
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	<b>Data removed from sample</b>					
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

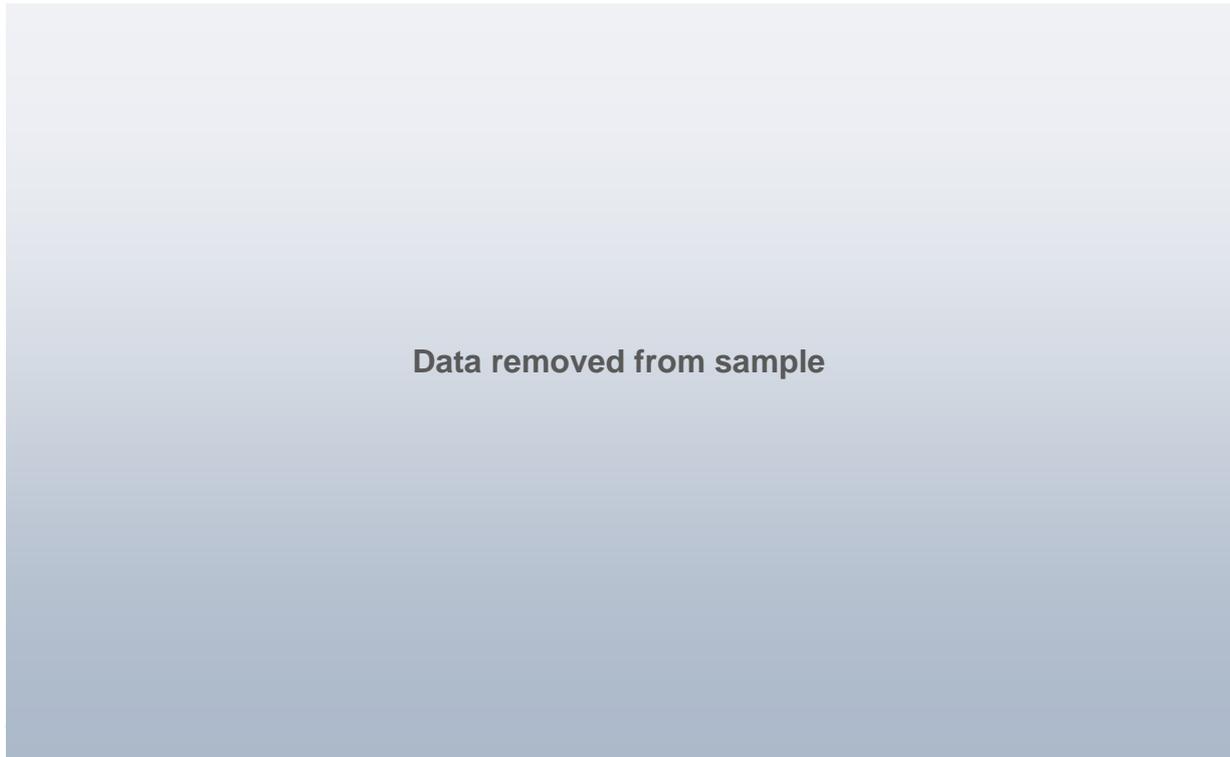
**Table 10 Sales of Consumer Health by Category: % Value Growth 2016-2021**

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
OTC	<b>Data removed from sample</b>		
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
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  - 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
<b>Data removed from sample</b>					

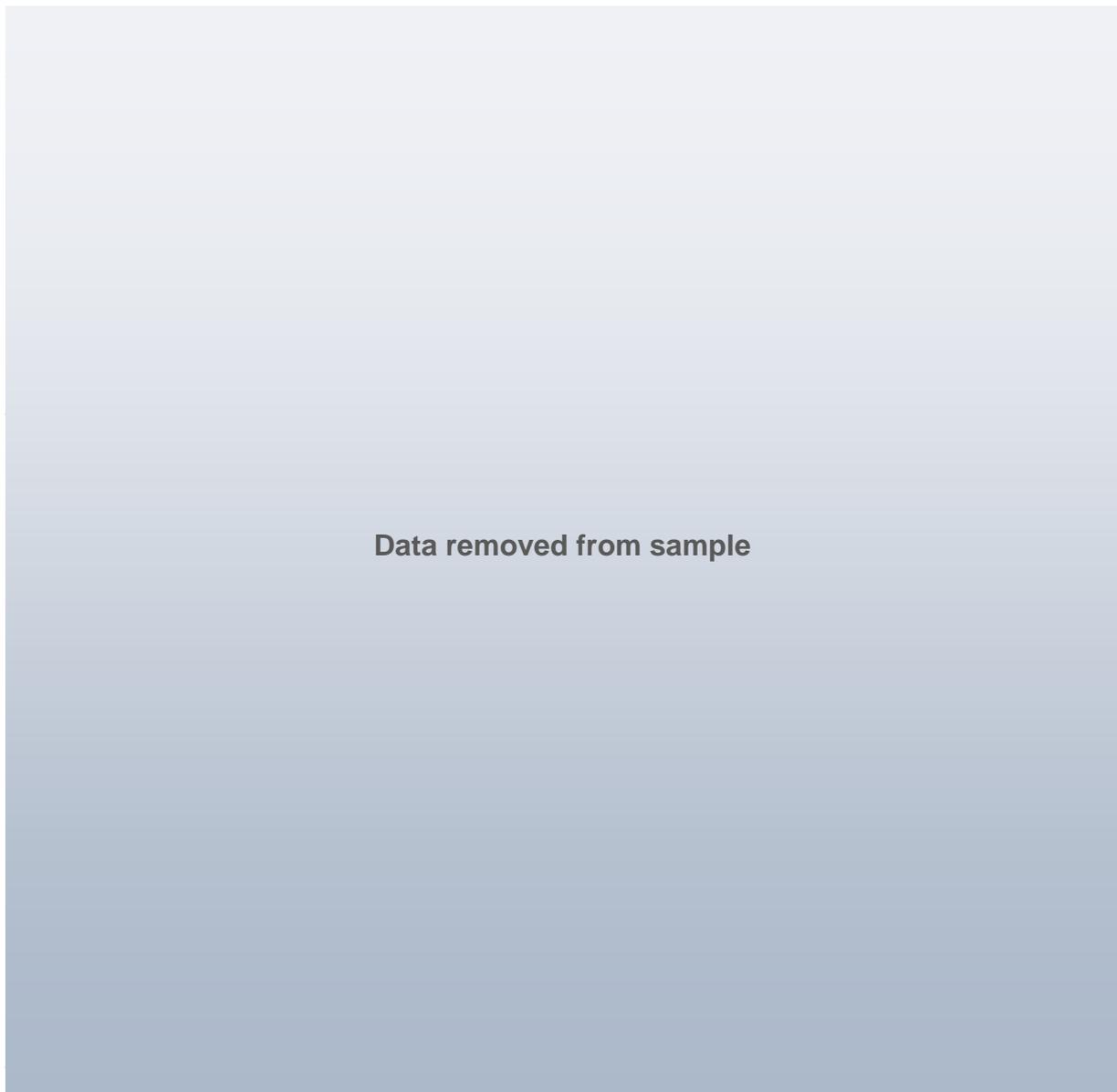


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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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	<b>Data removed from sample</b>					
Herbal/Traditional Products						
OTC						
Paediatric Consumer Health						
Sports Nutrition						

Vitamins and Dietary Supplements  
Weight Management and Wellbeing

**Data removed from sample**

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	<b>Data removed from sample</b>					
- 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	<b>Data removed from sample</b>											
- 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												
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--- Other Consumer Health Non-Grocery Specialists												
Non-Store Retailing												
- Vending												
- Homeshopping												
- E-Commerce												
- Direct Selling												
Total												
							Paediatric					
							Consumer Health					
Store-Based Retailing							<b>Data removed from sample</b>					
- Grocery Retailers							<b>Data removed from sample</b>					
-- Modern Grocery	<b>Data removed from sample</b>											

- 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
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- 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

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	<b>Data removed from sample</b>					
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

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

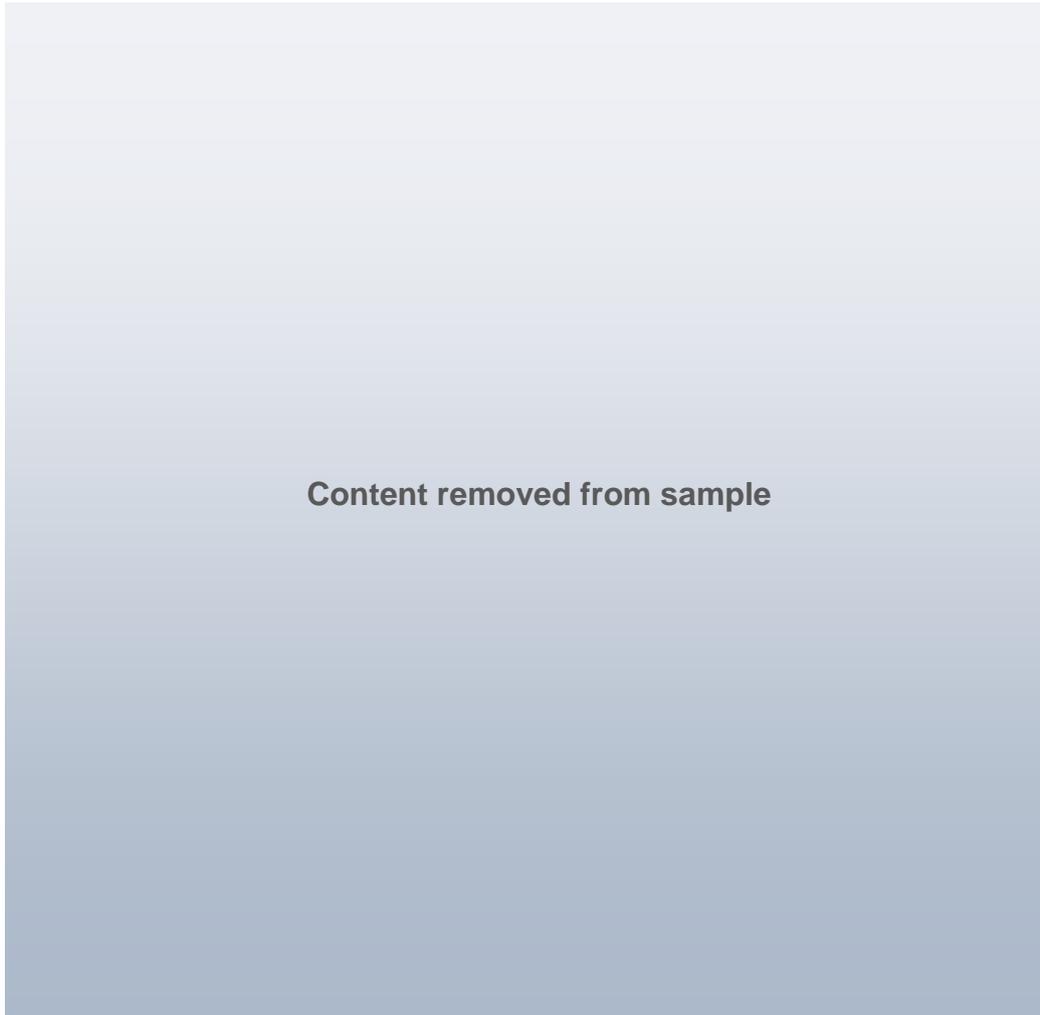
% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
OTC	<b>Data removed from sample</b>		
Sports Nutrition			
Vitamins and Dietary Supplements			
Weight Management and Wellbeing			
Herbal/Traditional Products			
Allergy Care			
Paediatric Consumer Health			
Consumer Health			

- 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
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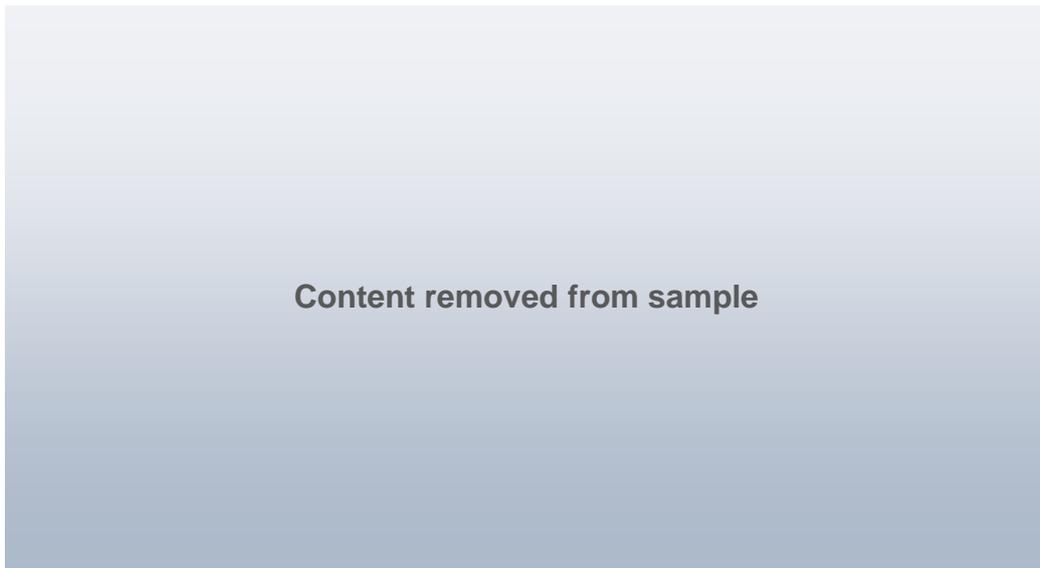
**APPENDIX**

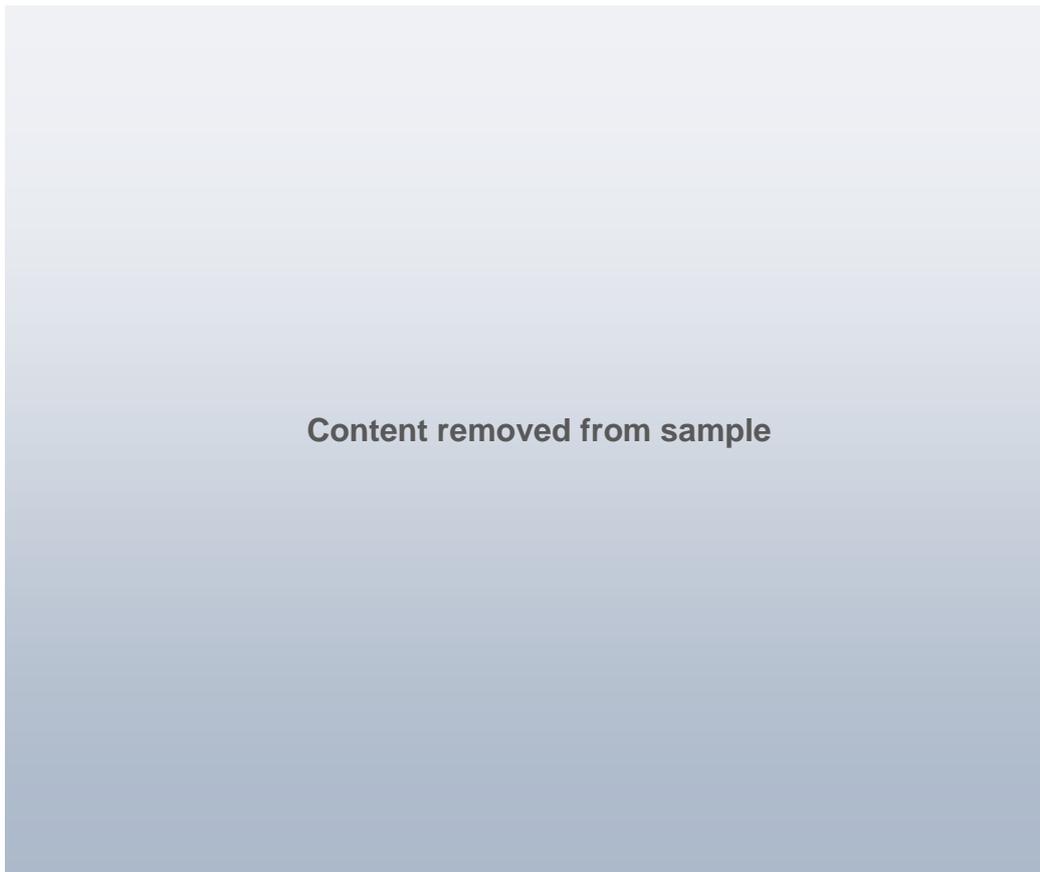
**OTC registration and classification**

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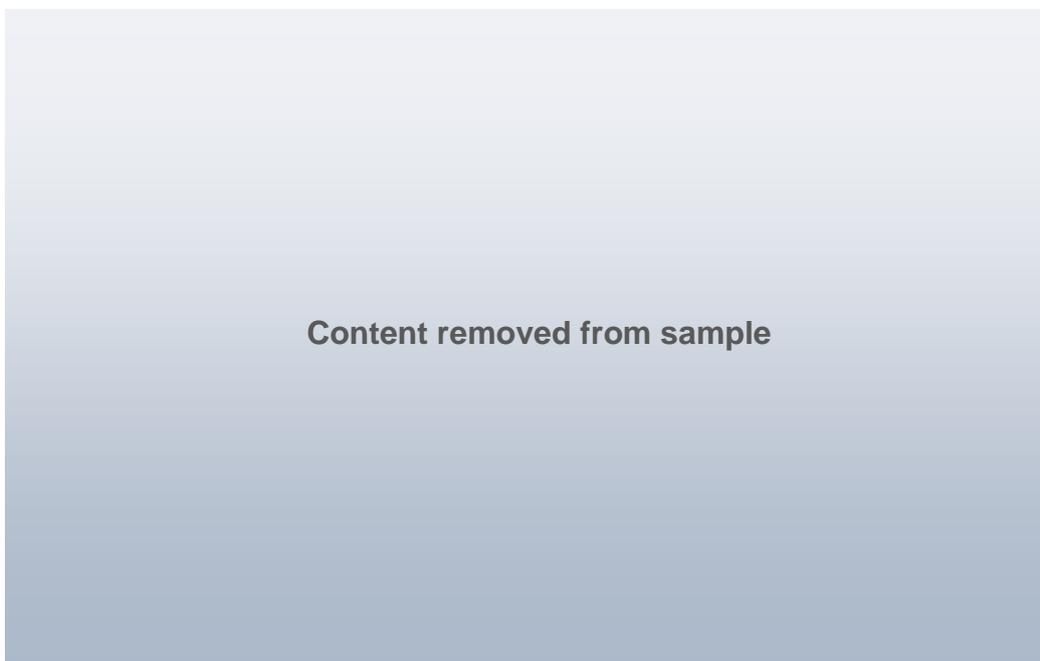


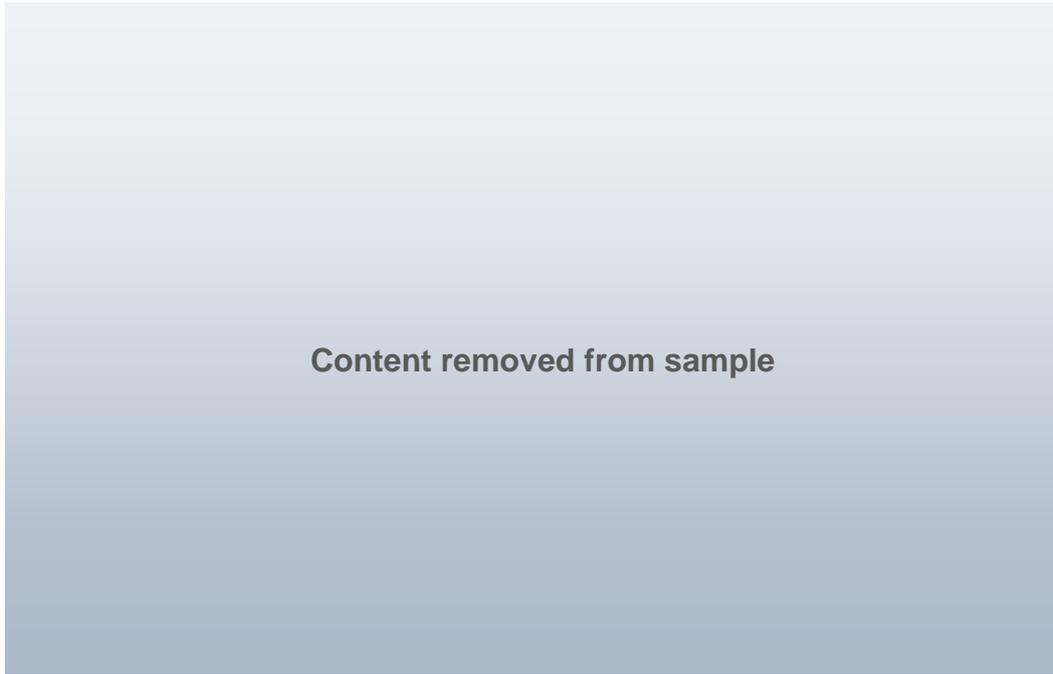
Vitamins and dietary supplements registration and classification





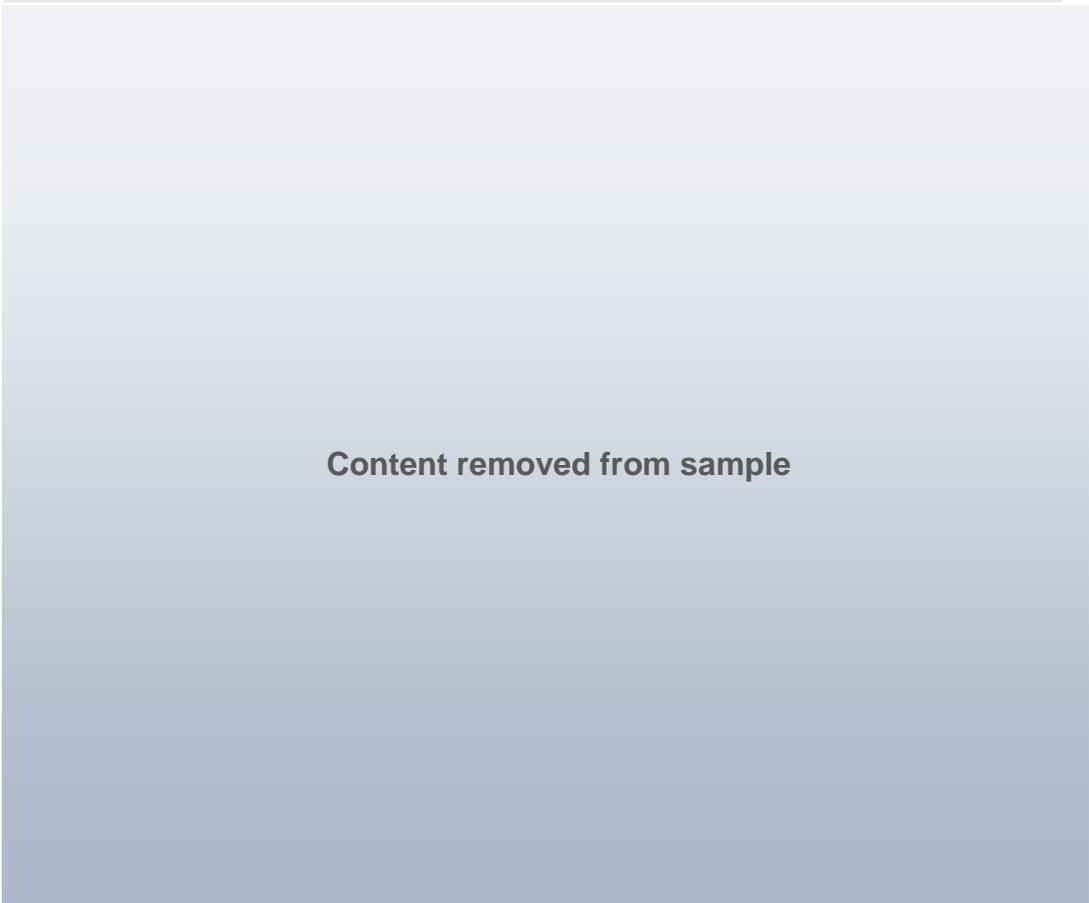
Self-medication/self-care and preventive medicine





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](http://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

[Redacted]

[Redacted]

Trade Associations

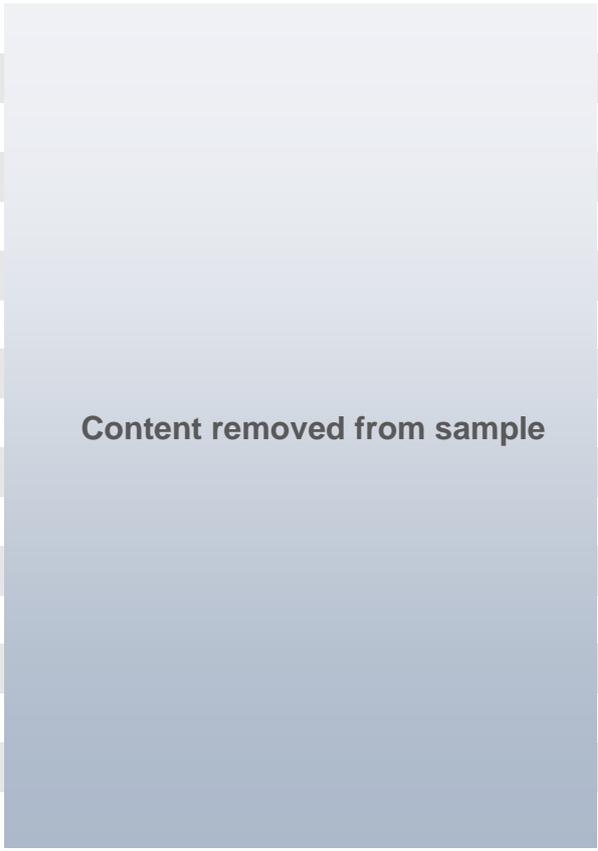
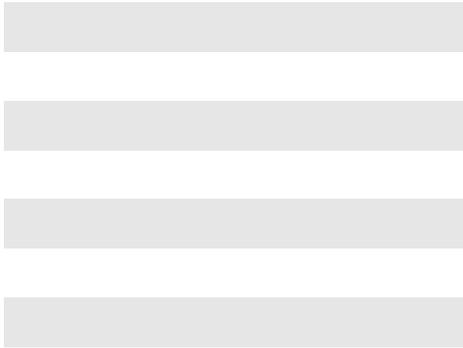
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Trade Press



Other Sources



Source: Euromonitor International