EXECUTIVE SUMMARY

Consumer health in 2023: The big picture
2023 key trends
Competitive landscape
Retailing developments
What next for consumer health?

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Analgesics in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Analgesics sees strong growth amidst extended season for illness
GSK Consumer Healthcare launches new range of natural acetaminophen, PanA Natra
Pharmacies trends downwards, but remains the leading channel for analgesics

PROSPECTS AND OPPORTUNITIES

Steady growth expected for analgesics, but lack of new competing brands
The TGA outlines plans to reduce the pack size of acetaminophen in Australia
Ageing population will keep demand for analgesics high

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Sleep Aids in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS
Consumers recognise the importance of quality sleep, increasing demand for sleep aids
Sleep aids competes with multiple other categories aiming to improve sleep quality
Dozile is the clear leader in a relatively small category

PROSPECTS AND OPPORTUNITIES
Poor sleep quality amongst young Australians will maintain rising demand for sleep aids
Convenience and ease of access may favour competing products over sleep aids
Stress and anxiety levels expected to rise amongst the Australian population

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Cough, Cold and Allergy (Hay Fever) Remedies in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS
Strong growth for cough, cold and allergy remedies amidst widespread flu, and low vaccination rates
Key players continue to dominate the Australian market
Several cough remedies recalled in Australia for containing pholcodine

PROSPECTS AND OPPORTUNITIES
Changing regulation for cough remedies a reality check for manufacturers
Pharyngeal preparations expected to continue beating medicated confectionery in the battle of throat lozenges
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Dermatologicals in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS
Key dermatologicals categories continue to see steady growth
Strong competitive landscape, with multiple brands fighting for share
Skin health is a key area of focus for Australian consumers

**PROSPECTS AND OPPORTUNITIES**

Hair loss a growing concern for Australians amidst an ageing population  
Forecast growth for e-commerce slow, as pharmacies expected to be the main distribution channel  
Declining birth rate could slow growth of nappy (diaper) rash treatments

**CATEGORY DATA**

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**Digestive Remedies in Australia**

**KEY DATA FINDINGS**

**2023 DEVELOPMENTS**

Diarrhoeal remedies posts strong growth amidst rising cases of gastroenteritis  
Hydralyte outpaces growth of many competing brands and dominates diarrhoeal remedies  
Antacids and laxatives are key categories, as health issues are on the rise for Australians

**PROSPECTS AND OPPORTUNITIES**

Digestive remedies will continue to play an important role in the lives of many Australians  
Dairy products increase their focus on probiotics and improving gut health  
Key brands expected to maintain their dominance of digestive remedies

**CATEGORY DATA**

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**Eye Care in Australia**

**KEY DATA FINDINGS**

**2023 DEVELOPMENTS**

Australians are suffering from a deterioration of eye health over time  
Time spent on screens rapidly increases over the last five years  
Australians are more vulnerable to allergies during the extended hay fever season

**PROSPECTS AND OPPORTUNITIES**

Eye care products will be more important for consumers as screen usage increases amongst Australians  
Australia’s ageing population at greater risk of dry eyes

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NRT Smoking Cessation Aids in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Awareness of the negative impacts of smoking help fuel growth of NRT smoking cessation aids
NRT gum and NRT patches are the key categories
Lack of competition, with Nicorette headlining growth

PROSPECTS AND OPPORTUNITIES

Australia ramps up its anti-smoking campaign through higher tax rates
Younger consumers less likely to start smoking, but vaping is a concern for the youth population
NRT smoking cessation aids likely to remain static, with limited new developments

CATEGORY INDICATORS

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Wound Care in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Increasing demand for wound care as life returns to normal for Australians
Lack of product development and competition leads to stagnant shares
Supermarkets stronger in wound care than in other OTC categories

PROSPECTS AND OPPORTUNITIES

Steady increase forecast for wound care, despite maturity
Potential for further improvement in environmental sustainability
Innovation forecast to be minimal, with limited new product development

CATEGORY DATA

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Sports Nutrition in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS
Protein/energy bars sees dynamism, almost matching protein powder in terms of growth
Musashi continues to see dynamic growth in sports nutrition in Australia
Health food stores lose out to supermarkets and e-commerce

PROSPECTS AND OPPORTUNITIES
Sports nutrition appeals to more than gym-goers, as older Australians look for protein solutions
Sports protein RTD has potential for growth as consumers seek convenience
Plant-based protein positioned for strong growth over the forecast period

CATEGORY DATA
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Dietary Supplements in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS
Rising cost-of-living pressures and squeezed discretionary spending place short-term pressure on consumers
Products targeting holistic health are growing in popularity
Beauty from within and women’s health positioning drive supplements consumption

PROSPECTS AND OPPORTUNITIES
Demographic shifts and evolving consumer base are transforming dietary supplements and driving format innovation
Mental health and wellbeing set to emerge as a key positioning in the long term
Blackmores acquisition, and growing consumer interest in supporting gut health

CATEGORY DATA
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Vitamins in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS
Volume growth tempered by rising unit prices and inflationary pressures
New launches contribute to continued value growth for multivitamins
Format innovation is growing the consumer base

PROSPECTS AND OPPORTUNITIES
Sales of immunity vitamins set to normalise
Personalisation represents a key opportunity for e-commerce
Format innovation expected to continue driving growth

CATEGORY DATA
Weight Management and Wellbeing in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS
Meal replacement products lose favour amidst competition from other categories
Social media campaigning a blueprint for success in a digital era
New flavours and plant-based options introduced to maintain consumers' interest

PROSPECTS AND OPPORTUNITIES
Consumers expected to gradually shift to other forms of weight and diet management
Overall health of Australians expected to worsen over the forecast period
Weight management and wellbeing an important tool for the ageing population

CATEGORY DATA
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Herbal/Traditional Products in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS
Herbal/traditional products sees continued growth due to health and wellness trend
Extended cold and flu season and low vaccination drive demand for herbal/traditional cough and cold remedies
Herbal/traditional products target sustainability claims for growth

PROSPECTS AND OPPORTUNITIES
Opportunity for natural cough remedies arising from changes in regulation of OTC cough medicines
Herbal/traditional sleep aids expected to continue to grow strongly
Growing demand for herbal/traditional products addressing women’s health, ranging from analgesics to dietary supplements

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Paediatric Consumer Health in Australia

KEY DATA FINDINGS
2023 DEVELOPMENTS

Steady growth for paediatric OTC products as vaccination rates for children decline
Paediatric analgesics and cough/cold remedies suffer from supply shortages
Parental concern about children's health prompts spending on vitamins and dietary supplements

PROSPECTS AND OPPORTUNITIES

Uncertainty surrounding supply shortages of children’s OTC products
Poor diet amongst Australians is leading to deficiencies in important vitamins

CATEGORY DATA

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