



# Passport

## Wound Care in Australia

Euromonitor International

October 2021

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purposes only.

Some content and data have been  
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# WOUND CARE IN AUSTRALIA - CATEGORY ANALYSIS

## HEADLINES

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## 2021 DEVELOPMENTS

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

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Mature category needs innovation to drive value

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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

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## CATEGORY DATA

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

AUD million

	2016	2017	2018	2019	2020	2021
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- First Aid Kits  
- Gauze, Tape and Other Wound Care  
- Sticking Plasters/Adhesive Bandages Wound Care

Data removed from sample

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
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- First Aid Kits  
- Gauze, Tape and Other Wound Care  
- Sticking Plasters/Adhesive Bandages Wound Care

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

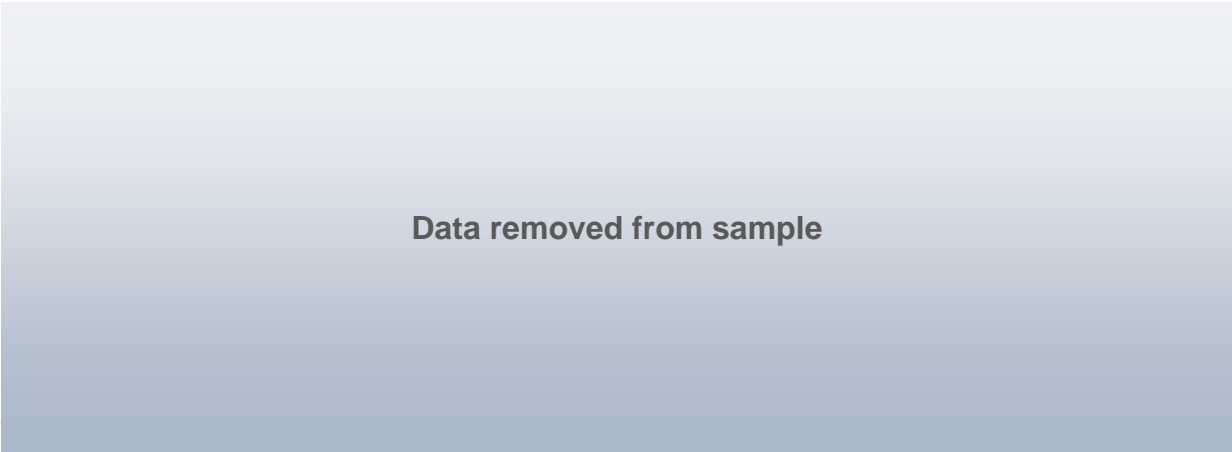
Note: 2021 data is provisional and based on part-year estimates

Table 3 NBO Company Shares of Wound Care: % Value 2017-2021

% retail value rsp

Company	2017	2018	2019	2020	2021
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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 Wound Care: % Value 2018-2021

% retail value rsp					
Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample					
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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	Data removed from sample					
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	Data removed from sample		
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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### 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

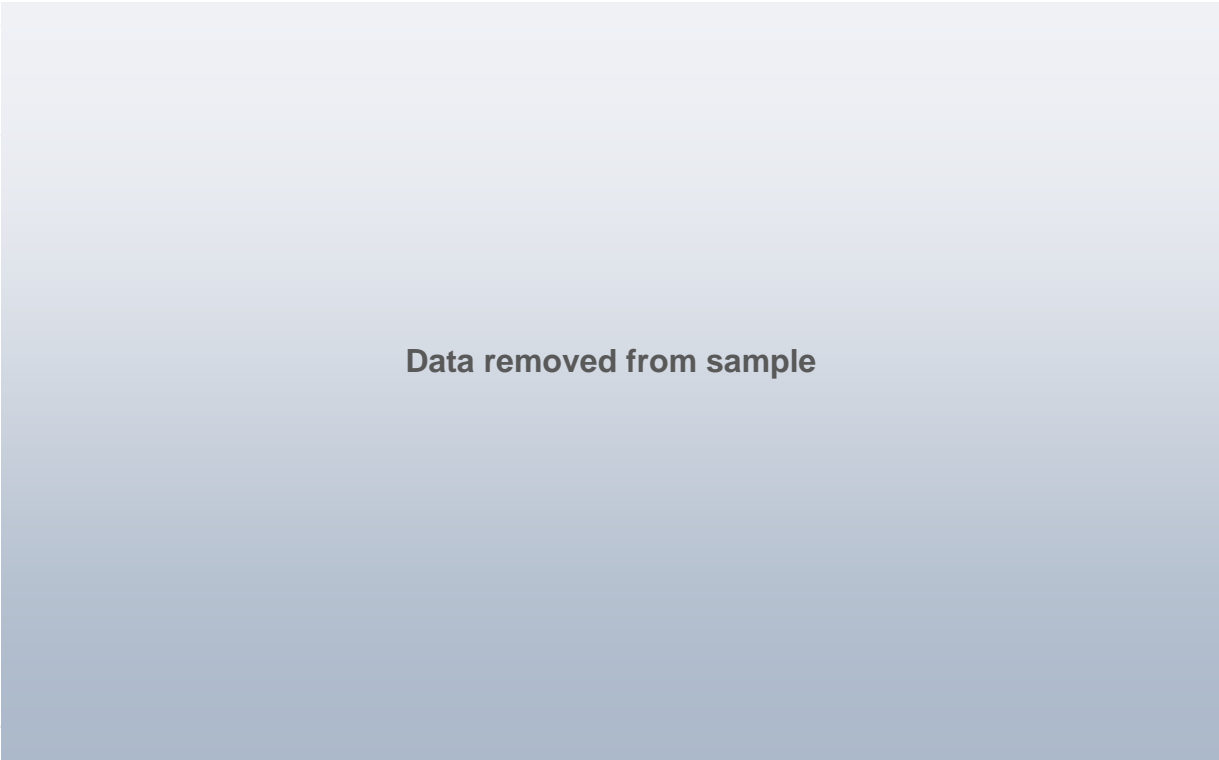
Note 3: 2021 data is provisional and based on part-year estimates

**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	<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	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						
- 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 removed 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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**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

Trade Associations

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Trade Press

Other Sources

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Source: Euromonitor International