

Complementary
Medicines
Australia

OCTOBER 2024



2024 Industry Snapshot



**CMA champions
a thriving
complementary
medicines
industry built on
quality, safety
and consumer
wellbeing.**



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From the CEO

As we reflect on another strong year for the complementary medicines industry in Australia, I am pleased to present our Industry Snapshot 2024. This report provides a comprehensive overview of our thriving sector, highlighting key trends, revenue figures, future projections and opportunities.

At Complementary Medicines Australia (CMA), we are committed to promoting a thriving industry built on quality, safety and consumer wellbeing.

The past year has seen our industry continue to grow and evolve, with revenues reaching \$6.2 billion in 2024. This growth is a testament to the increasing consumer demand for natural health solutions and the innovation of our members.

Our export success continues to be a highlight, with Australian products highly sought after globally due to our reputation for quality and safety. Exports have reached \$1.2 billion, with China remaining our largest market. We are also seeing exciting growth opportunities across Southeast Asia, India and the Middle East.

As an industry, we remain committed to supporting the health and wellbeing of Australians. With over 75% of households using complementary medicines, our products play a vital role in preventive health and overall wellbeing. This aligns with broader health trends, as consumers increasingly seek natural and holistic approaches to managing their health.

Innovation remains at the heart of our industry. From new delivery formats like gummies to personalised nutrition solutions, our members are at the forefront of developing products that meet evolving consumer needs. We are also embracing sustainability, with many companies taking important steps to reduce their environmental impact and ensure ethical supply chains.

Looking ahead, we see tremendous opportunities for further growth and innovation. The global market is projected to reach \$418 billion by 2027, and our industry is well positioned to capitalise on this growth. The Australian market is expected to grow 5.7% (CAGR) between now and 2029.

At CMA, we remain dedicated to advocating for our members, fostering innovation, and upholding the highest standards of quality and safety. As we navigate the evolving landscape of health and wellness, I am confident that our industry will continue to thrive and make a positive impact on global health.

I would like to thank our members for their ongoing support and commitment to excellence. Together, we are building a strong, innovative industry that makes a real difference to people's health and wellbeing.

John O'Doherty

Chief Executive Officer,
Complementary Medicines Australia





About Complementary Medicines Australia

Complementary Medicines Australia (CMA) is the peak industry body for the \$6.2 billion complementary medicines supply chain in Australia.

We represent members across the entire industry supply chain, including manufacturers, raw material suppliers, wholesalers, distributors, exporters, retailers and regulatory consultants. CMA promotes appropriate industry regulation and advancement to ensure consumers have access to complementary medicines of the highest quality.

We are proud to work closely with the Therapeutic Goods Administration (TGA) and other Australian Government agencies and departments, such as Austrade and the Department of Foreign Affairs and Trade, to ensure a strong and sustainable industry.

We work hard to ensure consumers have access to safe, high-quality products, and we advocate for our industry, promote research and innovation, and uphold the highest standards of quality and safety.



About the complementary medicines industry



About complementary medicines

Complementary medicines encompass a wide range of products, from vitamin and dietary supplements (VDS) to herbal remedies and traditional medicines like Ayurveda and Chinese medicine. These products are designed to complement conventional medical treatments, offering a holistic approach to health and wellbeing.

Complementary medicines, including traditional and integrative therapies, are recognised globally, including by the World Health Organisation.

Complementary medicines in Australia

Australia boasts a thriving complementary medicines industry, with a strong international reputation for producing high-quality and safe products.

Beyond its significant contribution to the health and wellbeing of Australians, the complementary medicines industry is a major economic driver, and annual revenue reached approximately \$6.2 billion in 2024.

The complementary medicines industry is also an Australian manufacturing and export success story. Annual exports have now reached \$1.2 billion, driven by the superior quality and safety of our products.

A strong reputation built on quality and safety

This growth is fuelled by our global reputation for producing high-quality, rigorously regulated products. This reputation is underpinned by the country's stringent regulatory framework, which ensures that complementary medicines meet the highest standards of safety, quality, and efficacy.

In Australia, the Therapeutic Goods Administration (TGA) regulates complementary medicines. The TGA ensures that products comply with Good Manufacturing Practice (GMP) standards, guaranteeing their safety and quality. Additionally, the TGA closely monitors health claims made on complementary medicines, ensuring they do not mislead consumers. Health claims must be backed by evidence.

These standards have not only solidified our domestic market but also earned international acclaim, driving demand for Australian complementary medicines globally. Australia's complementary medicines have established a robust presence in the international marketplace, and the clean, green, and safe image of Australian products resonates strongly with consumers worldwide.

Who uses complementary medicines?

The industry has witnessed significant growth in recent years. Over 75% of Australian households use complementary medicines, particularly those with higher education and income levels. This reflects a growing emphasis on preventive health and wellbeing, driven by a number of factors:

- Rising health concerns: with increasing rates of chronic diseases and a growing emphasis on preventive health, consumers are seeking natural alternatives to conventional treatments.
- Ageing population: as the population grows older, there is a greater demand for products that can support overall health and quality of life.
- Desire for natural solutions: many people prefer natural remedies that are perceived as having fewer side effects compared to synthetic medications.

The role of complementary medicines in preventive health

Many Australians are turning to complementary medicines and the allied health practitioners that use them, such as naturopaths, to improve their health and wellbeing. Given that primary healthcare in Australia is under considerable strain, with hospitals and general practices stretched beyond capacity, preventive health offers benefits to individuals and the wider community.

This approach often involves using complementary therapies alongside conventional medical treatments, providing a more holistic health solution. The complementary medicines industry promotes preventive health measures such as lifestyle modifications, regular exercise, healthy practices, and dietary supplementation as primary interventions.

Complementary medicines play a crucial role in supplying essential nutrients that may be lacking in diets, thereby contributing to overall health and preventing deficiencies that could lead to health issues.

Such preventive measures can play a significant role in easing the healthcare burden. Preventive health has been proven to result in better health outcomes, which deliver not only a positive impact on the health and wellbeing of Australians, but financial benefits for government. Complementary medicines should be a fundamental element in this preventive health focus for government.

Given Australia's ageing population and the increasing incidence of chronic diseases, the demand for these therapies and products is expected to rise further. This demographic shift is prompting more individuals to seek out preventive measures and integrative health solutions to maintain their quality of life.

Empowering well-informed health consumers is integral to improving outcomes and fortifying the population's resilience, ensuring the long-term sustainability of essential healthcare services.

“75% of Australian households use complementary medicines. This reflects a growing emphasis on preventive health and wellbeing.”



Snapshot at a glance

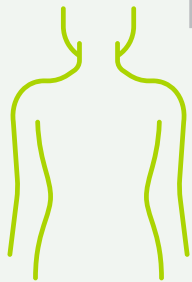


\$6.2 billion
Australian industry

75% of Australian households use complementary medicines

15,900 direct employees

#1
Women's health top VDS category in Australia



31% of Gen Z like gummies



#1
Mental wellbeing is top health concern for global consumers



82%
of VDS sales through stores vs 18% online



38,800
complementary medicine practitioners

\$3.8 billion
Australians spend on natural therapy practitioners



Vietnam now **#2** export market

Mood/relaxation is the VDS category with highest growth

\$1.2 billion exports



China largest export market with **75%** share



\$418 billion forecast size of global market

50% Australians have chronic disease



5.7%



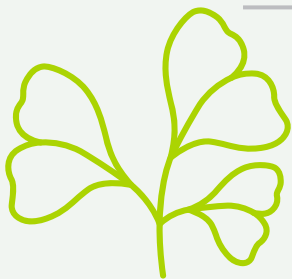
forecast market growth in Australia (2024-29 CAGR)

82

TGA licensed manufacturing facilities

80% Australians have long-term health condition

Thailand and India fastest growing CMA target markets



Almost **1 in 3** therapeutic herbs face extinction

0

Zero emissions target for CMA members

Sports nutrition continues to be the driver of growth in the market



Consumers are looking for vegan, natural and sustainable products



Strictest regulations in the world

Note: All dollar figures in this document are AUD unless noted otherwise.

Public health

The state of health

Like the populations of many developed nations, Australians face significant health challenges, including rising rates of chronic diseases, mental health issues and an ageing population.

Over 80% of Australians live with a long-term health condition, and approximately 50% have at least one chronic disease.

Health expenditure in Australia has been on the rise, with the country spending \$241.3 billion on health goods and services, or \$9,365 per person. This represents an increase of 6% in real terms compared to the previous year. Australia's health spending accounts for 10.5% of GDP, compared to the OECD average of 9.5%.¹

Modern health concerns often stem from factors such as high-pressure work environments, excessive screen time, sedentary lifestyles, and resulting issues like eye strain, joint pain, sleep disturbances, stress, and anxiety.

While there has been a decline in the national smoking rate and per capita alcohol consumption, obesity rates continue to rise, posing a significant public health challenge. The effects of increasingly

sedentary and busier lifestyles of many Australians are further intensified by an increased consumption of fast food with high-fat content along with less vegetable and fruit consumption.

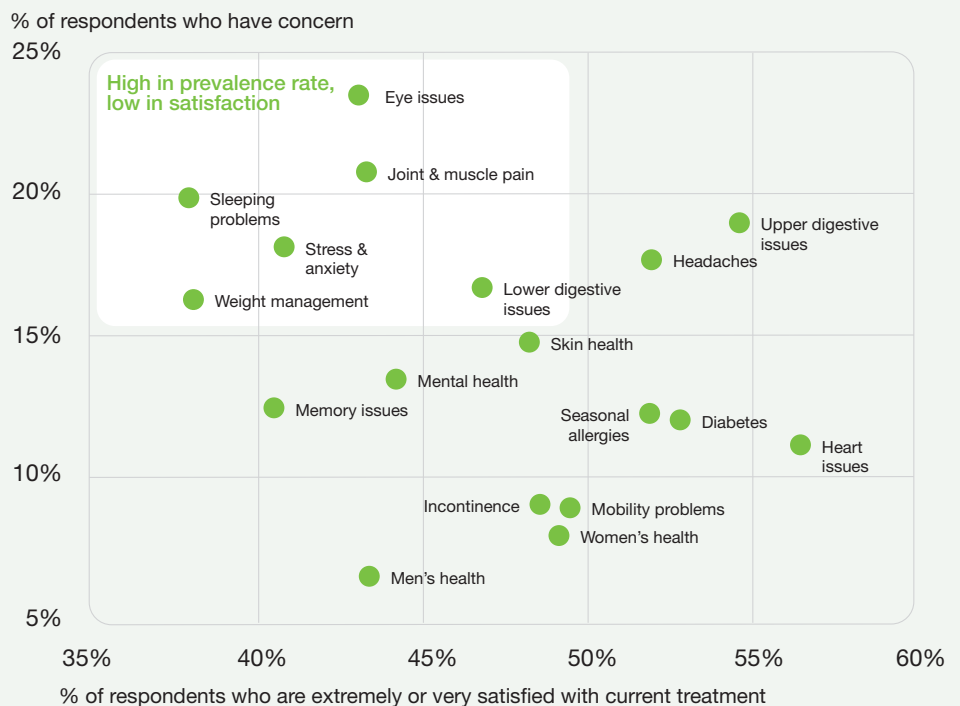
Globally, sleep, mental health, and physical exercise are ranked as the top three health concerns², and this trend is also reflected in Australia. Mental health, in particular, has emerged as a major global health concern, and Australia is no exception. Stress, anxiety, and depression are increasingly prevalent, affecting people of all ages. Reflecting this concern, according to Euromonitor International, 63% of global consumers now consider mental wellbeing as the primary aspect of health.

Many individuals in the Asia Pacific region express dissatisfaction with current treatment methods for lifestyle conditions such as sleeping problems, eye/vision issues, joint and muscle pain, stress and anxiety and weight management.

Complementary medicines have an important role to play in addressing these challenges, and offer untapped benefits to the health system.

1. Australian Institute of Health and Wellness. (2024). Australia's Health. Figures for 2021-22.
2. NIQ. (2024). Stronger, Faster Health & Wellness Growth in Asia, Growth Asia Summit.

Satisfaction with current treatment, Asia Pacific



Source: Euromonitor Voice of the Consumer: Health and Nutrition Survey, fielded 2023.

Overview



Chronic disease

81.4%

8 in 10 people had at least one long-term health condition

49.9%

1 in 2 people had at least one chronic condition.



Source: Australian Bureau of Statistics. (2023). Health conditions prevalence. Figures for 2022.

What does 'being healthy' mean?

Top five global definitions of 'health'

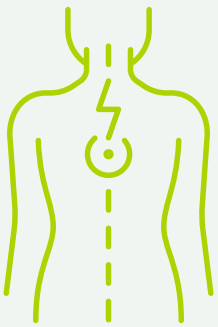
1. **Mental wellbeing**
2. **A healthy immune system**
3. **Getting enough sleep**
4. **Feeling 'good'**
5. **Emotional wellbeing**

Top five definitions of 'health' in Australia

1. **Mental health**
2. **Getting enough sleep**
3. **Feeling 'good'**
4. **Drinking enough water**
5. **Eating a balanced diet**



Australia's most common chronic conditions



- 01 **Mental and behavioural conditions – 26.1%**
- 02 **Back problems – 15.7%**
- 03 **Arthritis – 14.5%**
- 04 **Asthma – 10.8%**
- 05 **Diabetes – 5.3%**

Source: Australian Bureau of Statistics. (2023). Health conditions prevalence. Figures for 2022.

The state of Australia's health

66%

of adults were overweight/obese in 2022 (56% in 1995). Australia is one of the world's most obese countries

94%

of adults are not eating enough vegetables

83%

of young people aged 15-17 are not doing enough exercise

23%

of adults have high blood pressure

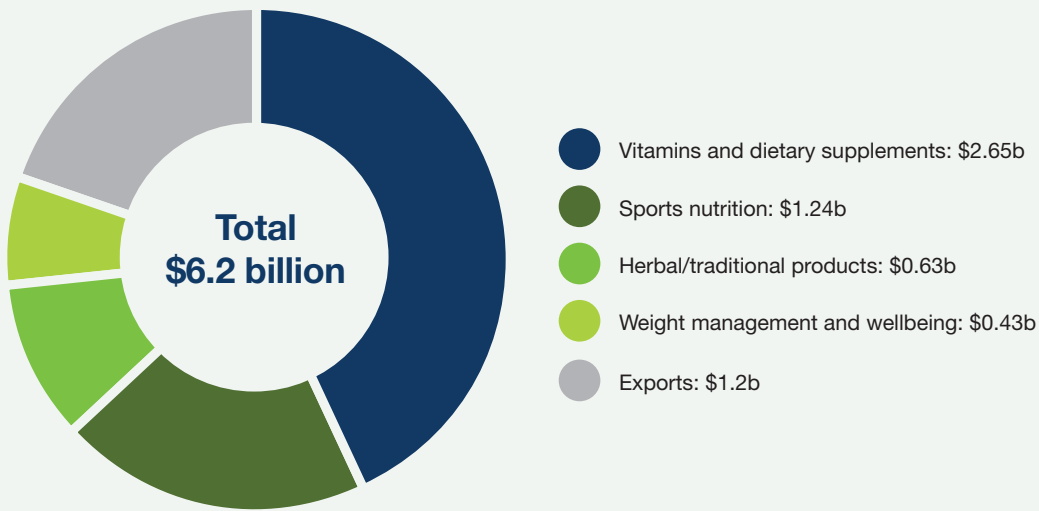


Source: Australian Institute of Health and Wellness. (2024). Australia's Health.

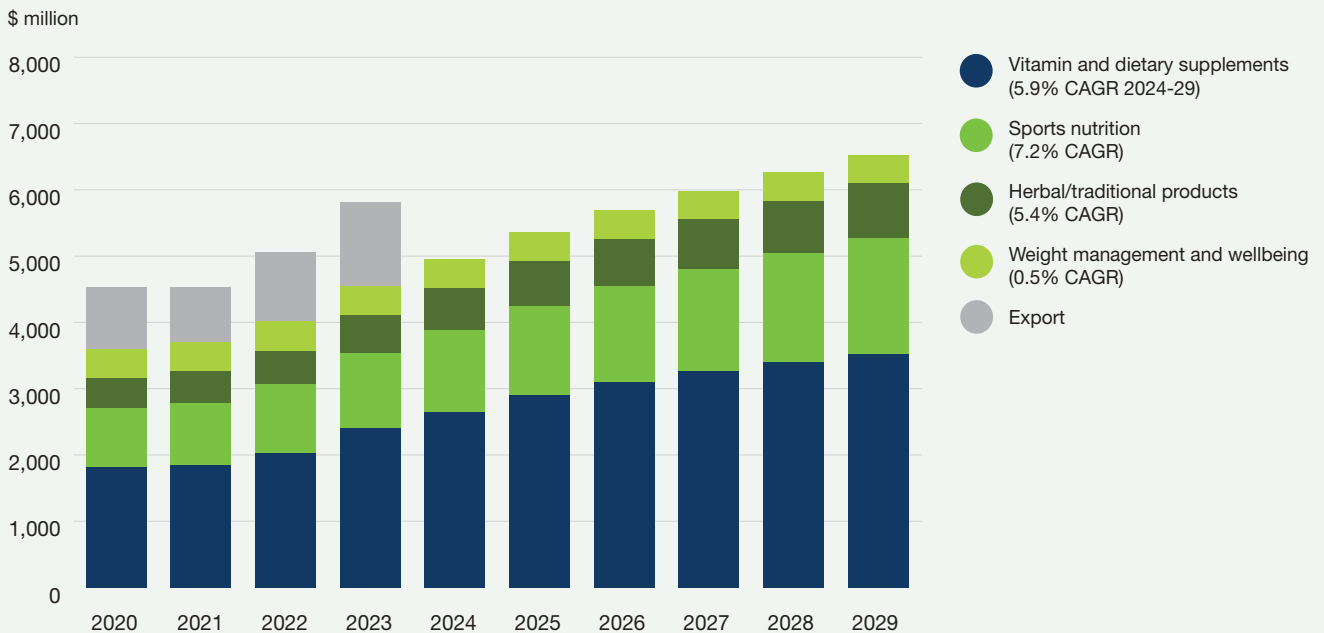
Industry overview

The Australian complementary medicines industry has experienced steady growth in recent years, with annual revenue reaching approximately \$6.2 billion in 2024. The complementary medicines industry is diverse, encompassing a wide range of products. The key revenue segments include:

Industry revenue breakdown (2024)



Industry growth and projections (2020-29)



Source: Euromonitor International Consumer Health 2025 Market Data

Australia's manufacturing sector

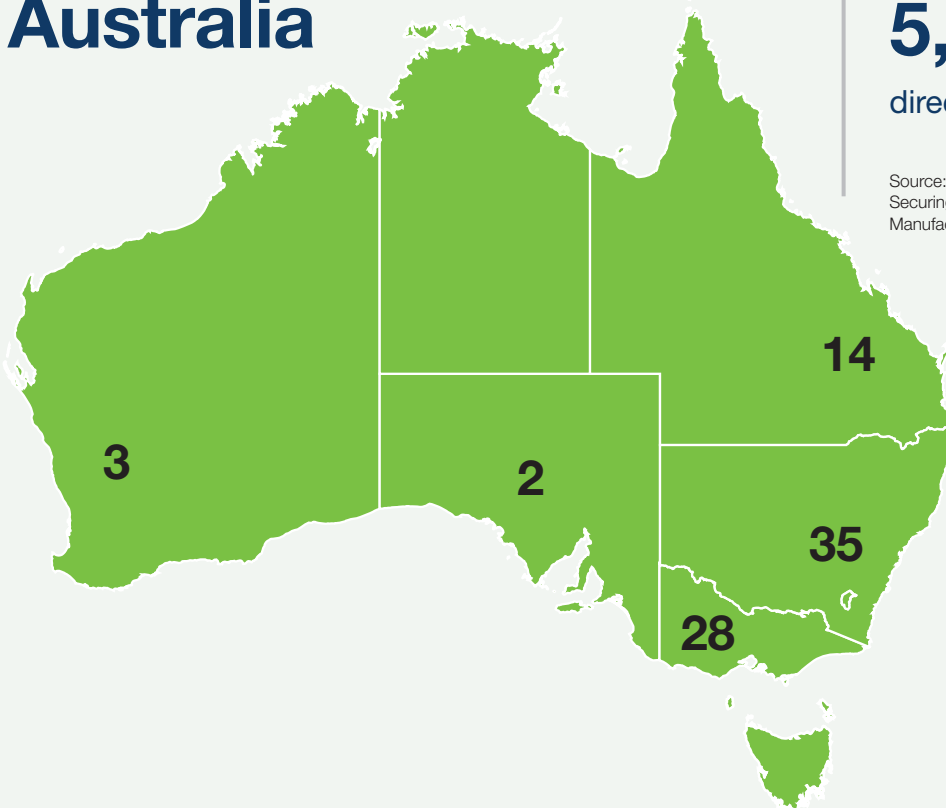
Australia's manufacturing sector is renowned globally for its innovation and best practices. The complementary medicines industry is a prime example of this excellence, identified as a high value-add Australian sector and a national priority for growth.

Australian manufacturers are leaders in research and development (R&D), driving innovation and setting industry standards. This commitment to innovation has contributed to the sector's reputation for producing the highest quality complementary medicines worldwide.

Manufacturing facilities

There are 82 TGA-licensed finished product manufacturing facilities for complementary medicines across Australia.

82 facilities across Australia



Source: Therapeutic Goods Administration. (2023). TGA Complementary Medicines Manufacturing Licence Registry.

Employment

The complementary medicines industry is a significant employer, directly and indirectly supporting jobs across various sectors, including manufacturing, logistics, research, retail and more. In 2022, the industry directly employed an estimated 5,500-6,800 people in production roles. However, the total direct workforce is estimated to be much larger, at 15,900 employees across both production and non-production roles.

15,900

direct jobs in production and non-production roles

5,500-6,800

direct jobs in production roles

Source: NICM Health Research Institute. (2023). Securing the Future of Complementary Medicines Manufacturing in Australia, a Strategic Business Case.

Trends in Australia

The complementary medicines industry is constantly evolving, with new trends emerging to meet changing consumer needs.

Best-selling vitamins and dietary supplements in Australia

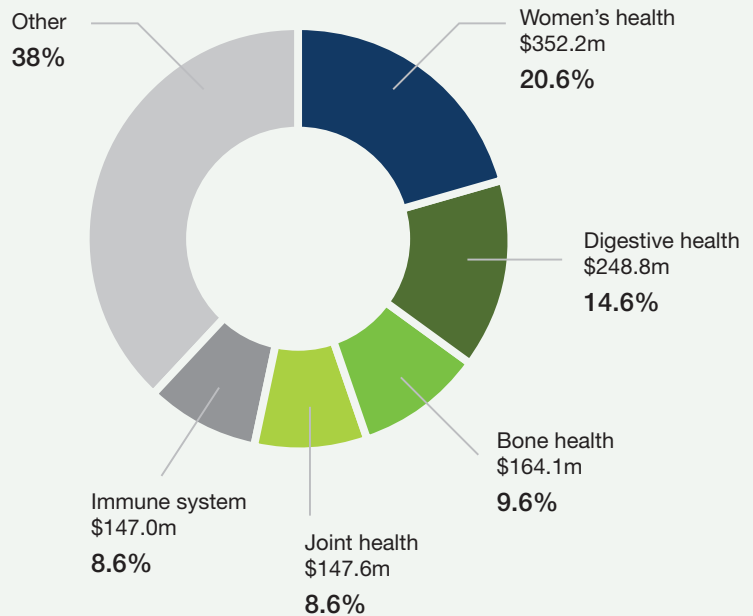
Women's health continues to reign supreme as the most popular segment of the vitamin and dietary supplement category, accounting for 20.6% of the market, valued at \$352.2 million in 2024, and including a wide range of products that address conditions emerging throughout a woman's life.

This is followed by digestive health products, which have seen significant growth as consumers seek remedies to combat the side effects of stressful lifestyles and unhealthy diets. Additionally, products supporting bone and joint health were the third and fourth most popular segments, reflecting the fact that 30% of Australians suffer from musculoskeletal conditions.³

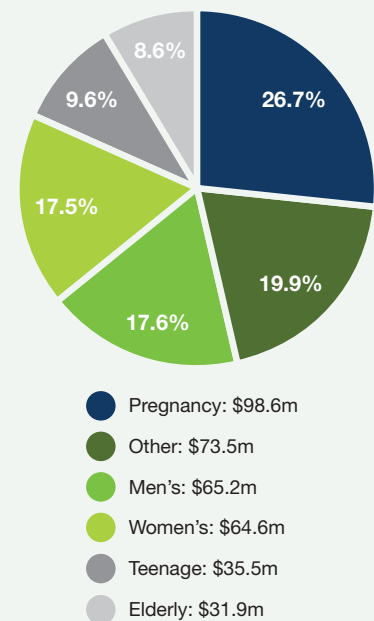
The mood/relaxing supplements category experienced the most rapid growth between 2019-24 with a CAGR of 20.6%, followed by beauty (16.8%), women's health (11.3%), energy (10.4%) and digestive (9.3%).

Within the multivitamin supplements category, pregnancy multivitamins experienced the most rapid growth, with 26.7% of the segment, \$98.6 million of sales in Australia and a CAGR of 11%.

Most popular vitamin and dietary supplement by category (2024)

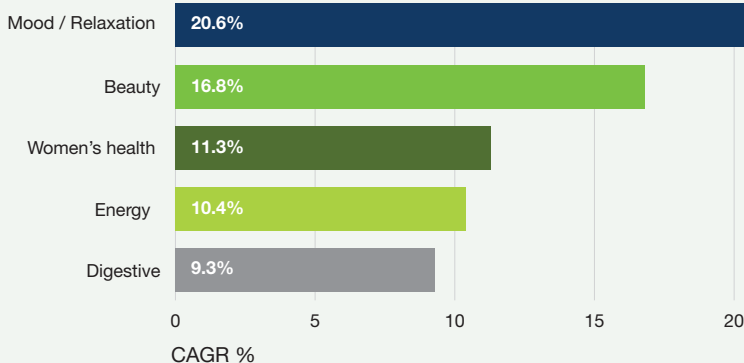


Multivitamin supplements positioning breakdown (2024)



Source: Euromonitor International, Consumer Health 2025 Market Data

Vitamin and dietary supplement category growth in Australia (2019-24)



3. Australian Institute of Health and Welfare. (2024). Australia's Health.

Mental health and wellbeing

Mental health is a growing concern and focus in Australia, especially among younger generations. It is estimated 8.5 million Australians aged over 16 have experienced a mental disorder at some time in their life, or around 43% of that age cohort.⁴

In response, consumers are seeking natural solutions to address stress, anxiety, and sleeplessness. In particular, complementary medicines, such as adaptogenic herbs and calming supplements, are gaining popularity as natural alternatives to traditional medications.

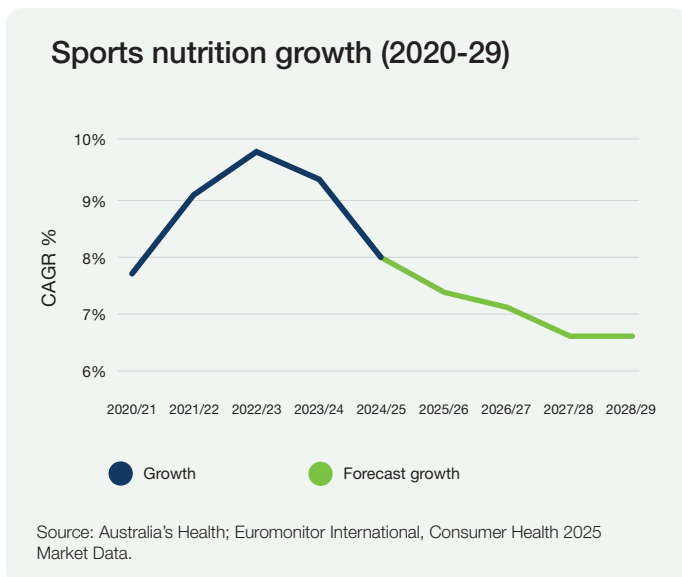
Beauty

The 'beauty from within' trend has led to a surge in demand for beauty supplements, such as collagen products. These supplements offer benefits like improved joint health, skin health, and hair and nail growth. This trend is driven by a desire for natural and effective solutions to enhance beauty and overall wellbeing.

Sports nutrition

The sports nutrition category is a particular area of growth, driven by society's increasing focus on fitness and exercise. Plant-based protein powders are a particularly popular segment, catering to the growing demand for sustainable and ethical products. Manufacturers are also focusing on developing new products, such as performance enhancers, pre-, post-, and intra-workout supplements, and fat burners. Protein powders are also proving popular among consumers seeking weight management solutions.

In response to this growing demand, manufacturers are expanding their product offerings to cater to a wider consumer base. According to Euromonitor, the sports nutrition category experienced a 9.2% CAGR between 2019 and 2024 and is forecast to have a 7.2% CAGR by 2029, with males aged 19-30 the main market.



Conscious consumer trends

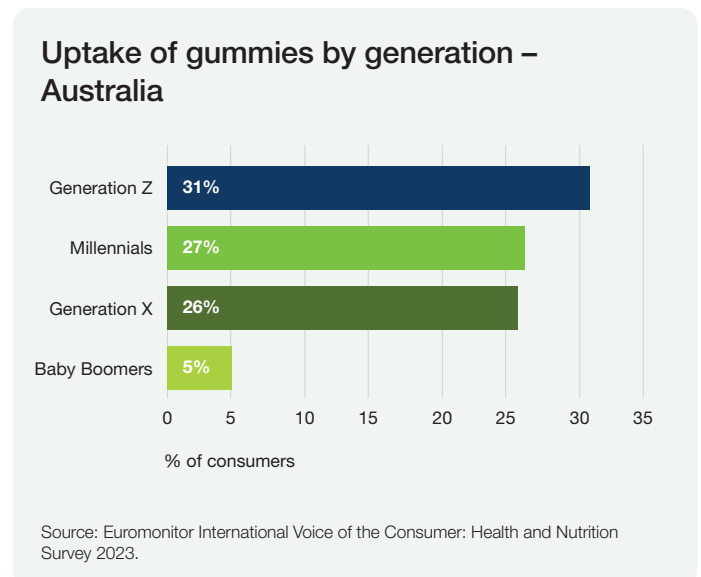
Consumers are becoming increasingly conscious of environmental sustainability and ethical sourcing. They are seeking products that are natural, organic and vegan. In response, vitamin manufacturers are developing new ranges that meet these needs. The conscious consumption trend has also led to a growing demand for products formulated with clean ingredients and packaged sustainably, with many manufacturers incorporating green packaging.

New technologies

Technological advancements are enabling the development of new and innovative complementary medicine products. Reflecting international trends, gummies, powders and liquids are becoming more popular formats with Australian consumers.

Gummies, in particular, are gaining significant traction among consumers, particularly younger generations who are more open to trying new and innovative formats that align with their preferences. According to Euromonitor, 96% of Baby Boomers prefer pills, capsules or gels, while only 5% of that same group indicates they would use gummies.

Conversely, Generation X, Millennials, and Generation Z are significantly more likely to embrace newer formats like powders, liquids and gummies. For example, 26% of Generation X, 27% of Millennials, and 31% of Generation Z would consider using gummies.



4. Australian Institute of Health and Welfare. (2024). Australia's Health.

Distribution channels

Australian consumers buy their complementary medicines via a range of distribution channels, both online and offline.

Retail offline sales continue to dominate the market in Australia, accounting for 82% of total sales in 2024. Offline retail channels, such as pharmacies and supermarkets, remain the primary points of purchase for many consumers. However, online retail (e-commerce) is experiencing strong growth. E-commerce gained significant traction during the COVID-19 lockdowns and this trend has continued, now accounting for 18% of the total VDS sales in Australia, and marking a growth of 28.8% since 2019.

The growth of online vitamin and supplement purchases is driven by several factors. Consumers are increasingly seeking vitamins and supplements to support proactive health, wellbeing, and beauty goals, and the convenience and accessibility of online shopping make it a easier to purchase these products. Additionally, innovative business models like subscription services, informative content, and personalised recommendations are attracting consumers. As the population ages, there is growing potential to target older consumers with tailored supplement offerings and educational resources.

Health food stores are developing new strategies to target consumers, such as omnichannel business models, adopting new retail formats as wellness locations, offering a wider range of products, including practitioner-only brands, and expanding their digital presence as clicks-and-mortar businesses.

With the rise of online shopping, some Australians are purchasing complementary medicines from overseas. It is important consumers understand these products may not comply with Australian regulations, as they are not subject to the same safety and quality standards. These products are not always as safe or effective as Australian made and regulated products, and potentially pose risks to consumers.

Vitamin and dietary supplements purchases: Online purchase vs retail/offline

Retail offline

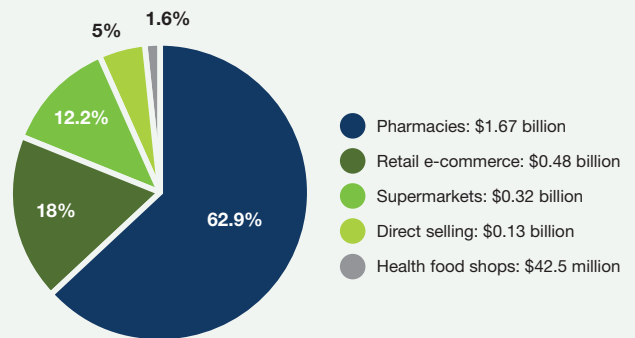
\$2.18^b | **82%**

Online purchase

\$0.48^b | **18%**

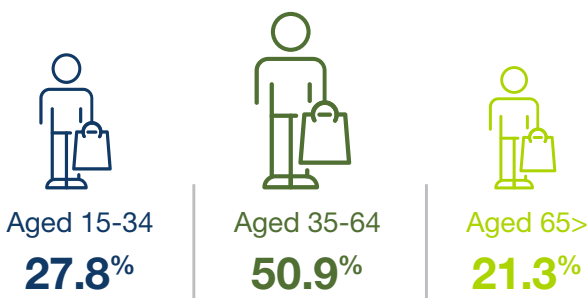
Where they purchased from:

Pharmacy, supermarket, direct selling, health food stores

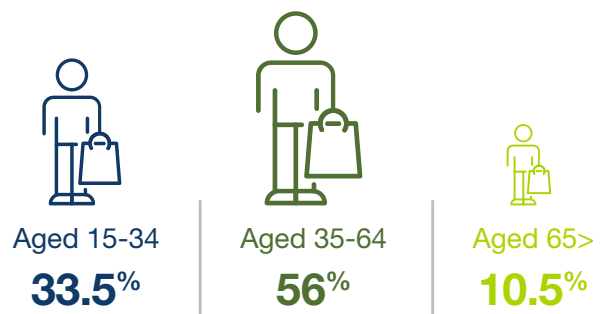


Source: Euromonitor International. Consumer Health 2025. Channel Data.

Health food shop sales by age



E-commerce sales by age



Sources: Euromonitor International. Consumer Health 2025 Channel Data. IBISWorld. (2024). Online Vitamin and Supplement Stores in Australia. IBISWorld. (2024). Vitamin and Supplement Stores in Australia.

Natural therapies

Natural therapies, including complementary and traditional health therapies such as naturopathy, chiropractic and osteopathy, and herbal and traditional medicines, have become increasingly popular in Australia. These therapies offer a holistic approach to health and wellbeing, often used in conjunction with conventional medical treatments.

The natural therapies industry has experienced steady growth, with practitioner revenues projected to reach \$4.3 billion by 2028-29, representing a CAGR of 3%.

The number of complementary medicine practitioners in Australia has steadily risen to 38,800.

Key trends and drivers

There are several factors driving the growth of the natural therapies industry in Australia. Many Australians are seeking complementary and traditional therapies to improve their health and wellbeing.

The increasing diversity of the Australian population is also driving demand for a wider range of therapies, including those rooted in traditional healing systems.

The growing number of older Australians is contributing to the demand for natural therapies, as these therapies can help manage chronic conditions and improve quality of life. The use of complementary and traditional therapies in palliative care is on the rise, as they can offer comfort and support to patients facing critical illnesses.

Revenues

\$3.8 billion

\$1.8b	47%	Complementary and traditional health therapies
\$1.5b	41.8%	Chiropractic and osteopathy
\$420m	11.2%	Herbal and traditional medicines

Natural Therapies



Industry revenue is forecast to climb by an annualised 3.0% over the five years through 2028-29 to \$4.3 billion



20,731
Businesses
(2024-29: 2.2% CAGR)



38,800
The number of complementary medicine practitioners

Source: IBISWorld. (2024). Alternative Health Therapies in Australia.

In 2019, the Australian Government banned private health insurance rebates for a variety of natural therapies – including some with a robust evidence base such as naturopathy, yoga, pilates and tai chi.

These therapies, particularly popular with young adults, encouraged Australians to adopt healthier lifestyles and exercise.

CMA continues to advocate for the ban on private health insurance rebates to be scrapped. These preventive health measures should be supported, to encourage good health and also help take pressure off the health system.



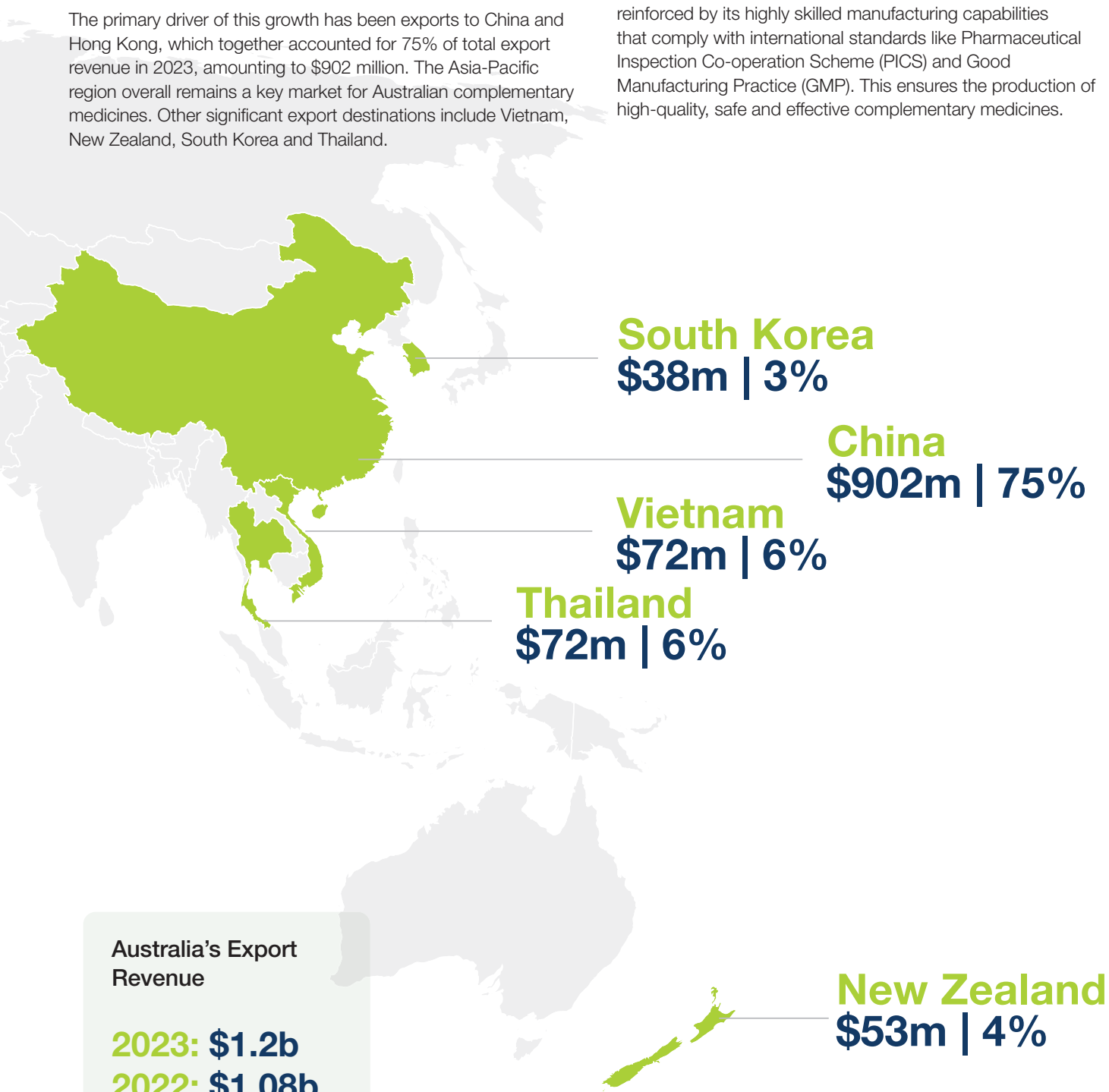
Export overview

Australia's complementary medicine products have achieved significant success in the global market, with exports reaching \$1.2 billion in 2023.

The primary driver of this growth has been exports to China and Hong Kong, which together accounted for 75% of total export revenue in 2023, amounting to \$902 million. The Asia-Pacific region overall remains a key market for Australian complementary medicines. Other significant export destinations include Vietnam, New Zealand, South Korea and Thailand.

'Made in Australia' carries a strong reputation and has high credibility in overseas markets, particularly in China. Australian products are highly sought-after due to their impeccable reputation for quality, safety and efficacy.

Australia's advantageous position in the global market is reinforced by its highly skilled manufacturing capabilities that comply with international standards like Pharmaceutical Inspection Co-operation Scheme (PICS) and Good Manufacturing Practice (GMP). This ensures the production of high-quality, safe and effective complementary medicines.



Australia's Export Revenue

2023: \$1.2b
2022: \$1.08b
2021: \$892m

Source: Australian Bureau of Statistics. Australian Complementary Medicines Export Statistics (2019-23)

China

Australia's largest export destination for complementary medicines is China. Australia's reputation for producing safe, effective and sustainable complementary medicines has made it a preferred supplier for Chinese consumers.

In 2023, Australia was the second-largest exporter of complementary medicines to China, with a market share of \$993 million (14.7%). This is a remarkable achievement, considering that Australia was ranked the 16th largest exporter (1.1%) in 2014. In 2019, Australia briefly overtook the US and became the number one exporter of complementary medicines to China.

Based on figures from the first half of 2024, Australia is projected to reach \$1 billion in exports to China this year.

The Chinese complementary medicines market has grown from \$61 billion in 2018, to \$72.6 billion in 2022, and is forecast to reach \$94.8 billion in 2027.⁵

Similar to Australia, the growth of the complementary medicines market in China is significantly influenced by its ageing population, which is driving demand for products that support cardiovascular health and bone health, such as high-EPA fish oil, krill oil, CoQ10 and calcium.

The COVID-19 pandemic fuelled demand for complementary medicines, with Chinese consumers seeking products to support immune health, such as Vitamin C, Zinc and probiotics.

Australian companies have responded to these trends by developing products specifically tailored to the Chinese market. This includes offering supplements that address the unique health concerns of China's ageing population and their demand for immunity-boosting ingredients.

In China, e-commerce has played a significant role in the distribution of consumer health products, including complementary medicines, with its market share reaching 42% in 2023 when it overtook offline retail sales for the first time.⁶

Australia is the second largest exporter of nutritional and health foods to China

Total import and export volume of China's nutritional and health foods (USD)

\$10.76b (2023)

Import \$6.7b/Export \$4b

\$9.1b (2022)



5. NICM Health Research Institute. (2023). Securing the Future of Complementary Medicines Manufacturing in Australia, a Strategic Business Case.

6. Euromonitor International. (2024). Consumer Health in Asia Pacific.

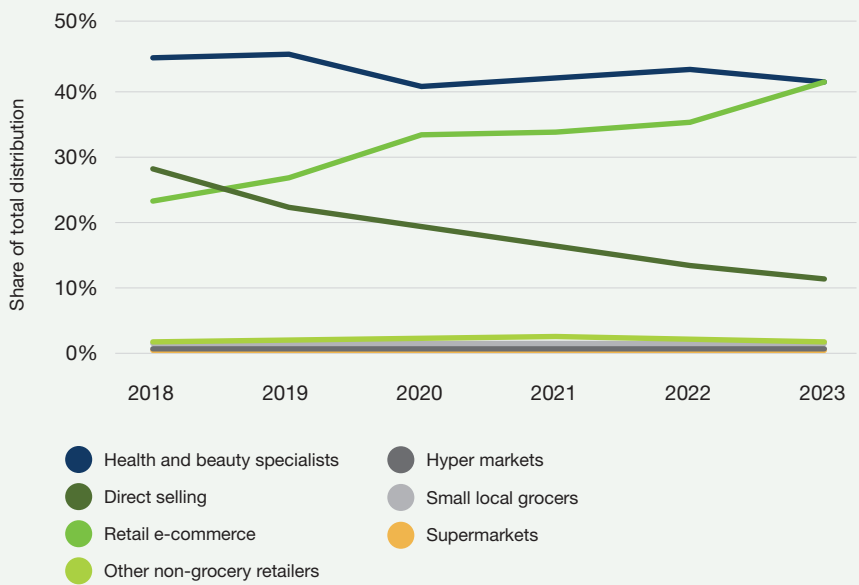
Top import markets for China: 2023 figures (USD)

USA	\$1.2b
Australia	\$993m
Germany	\$738m
Indonesia	\$527m

Top import markets for China: January-June 2024 figures (USD)

USA	\$960m
Australia	\$540m
Germany	\$510m

Consumer health share of total distribution channel (2018-23)



Sources: China Chamber of Commerce for Import and Export of Medicines and Health Food Products, 2024, Analysis of the Foreign Trade Situation of Nutritional and Health Foods. Euromonitor International. (2024). Consumer Health in Asia Pacific.

Export target markets

CMA has identified seven target markets that have the potential to drive future growth for Australian complementary medicines exports – Indonesia, Thailand, Vietnam, Singapore, Malaysia, India and the United Arab Emirates.

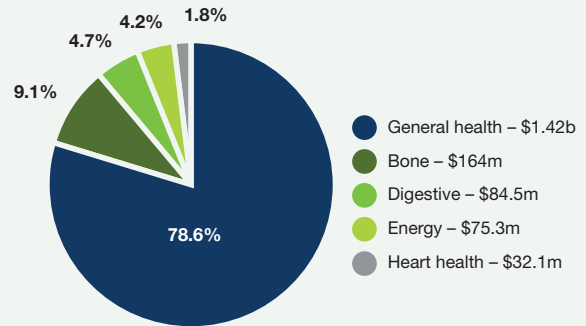
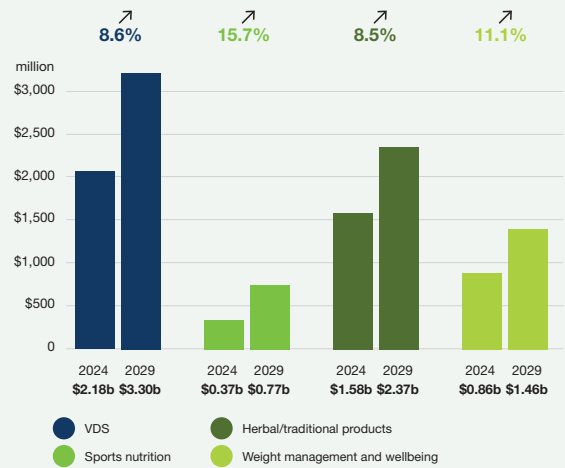
Demand for complementary medicines is forecast to continue growing in all of these target markets, and at a higher rate than in Australia. The strongest growth is predicted for India and Thailand.

For each market we have shown (in USD):

- current total market size (2024) and forecast market size (2029)
- current segment size and forecast growth
- most popular vitamin and dietary supplement by category (2024).

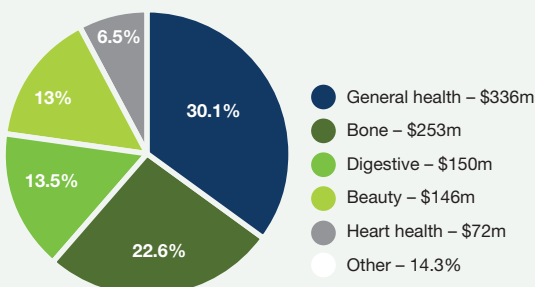
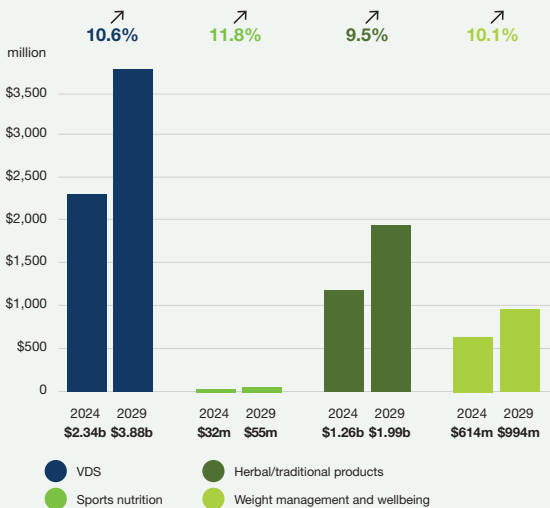
India

\$4.99 billion (2024) / \$7.90 billion (2029)



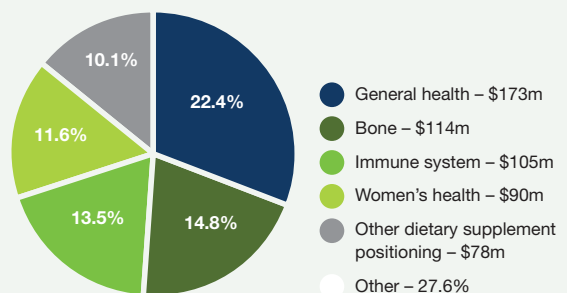
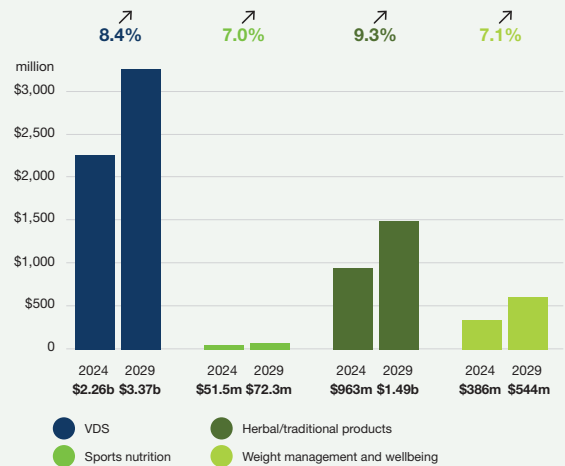
Thailand

\$4.26 billion (2024) / \$6.93 billion (2029)



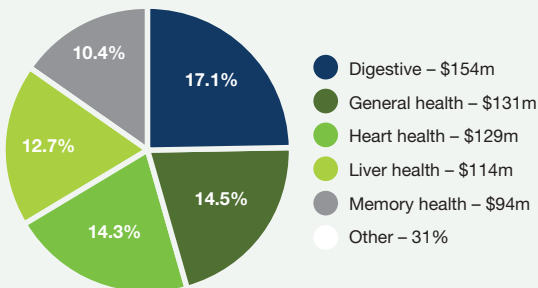
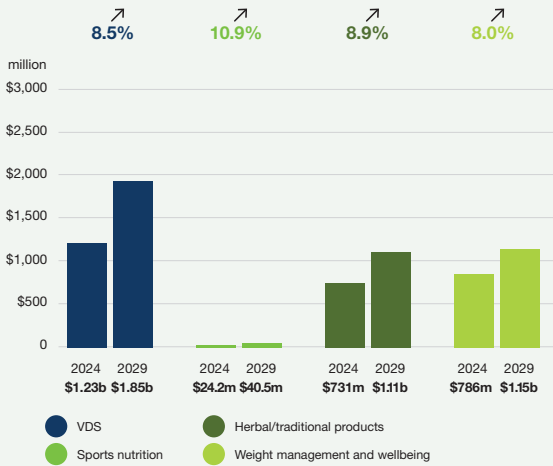
Indonesia

\$3.66 billion (2024) / \$5.49 billion (2029)



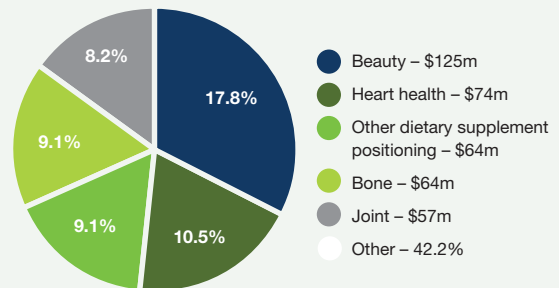
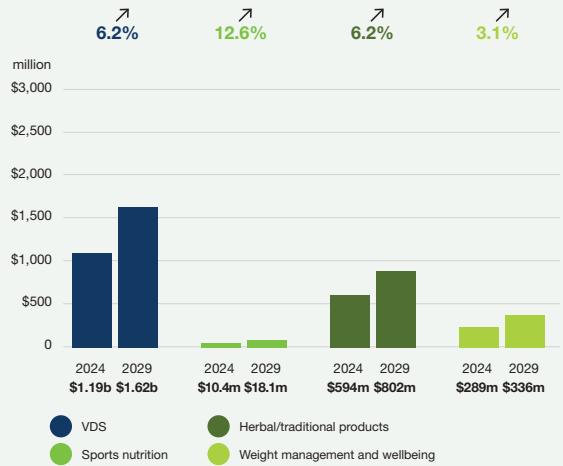
Vietnam

\$2.77 billion (2024) / \$4.16 billion (2029)



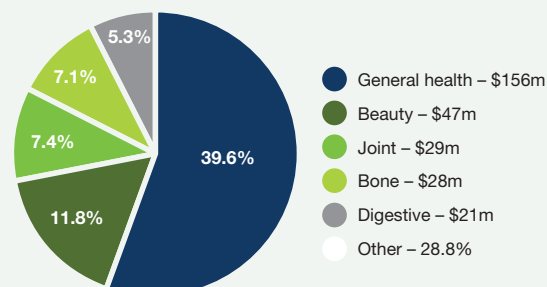
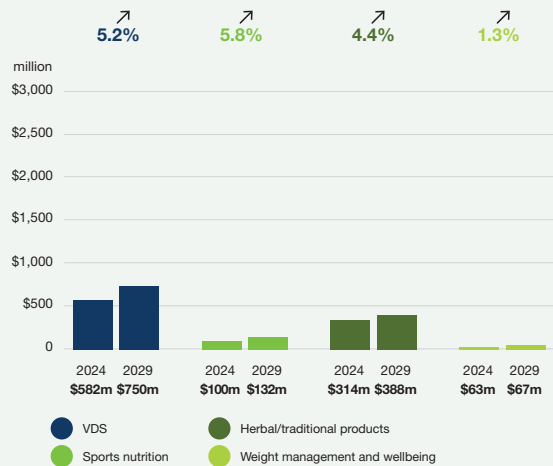
Malaysia

\$2.09 billion (2024) / \$2.78 billion (2029)



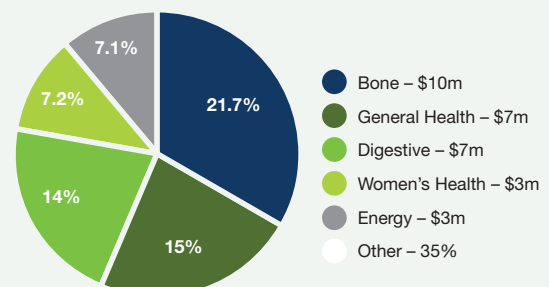
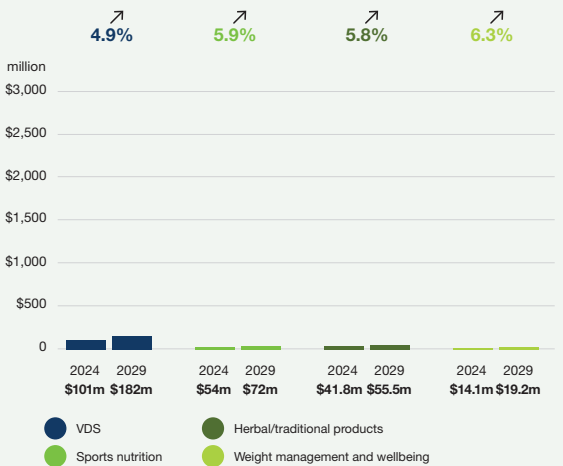
Singapore

\$1.06 billion (2024) / \$1.34 billion (2029)

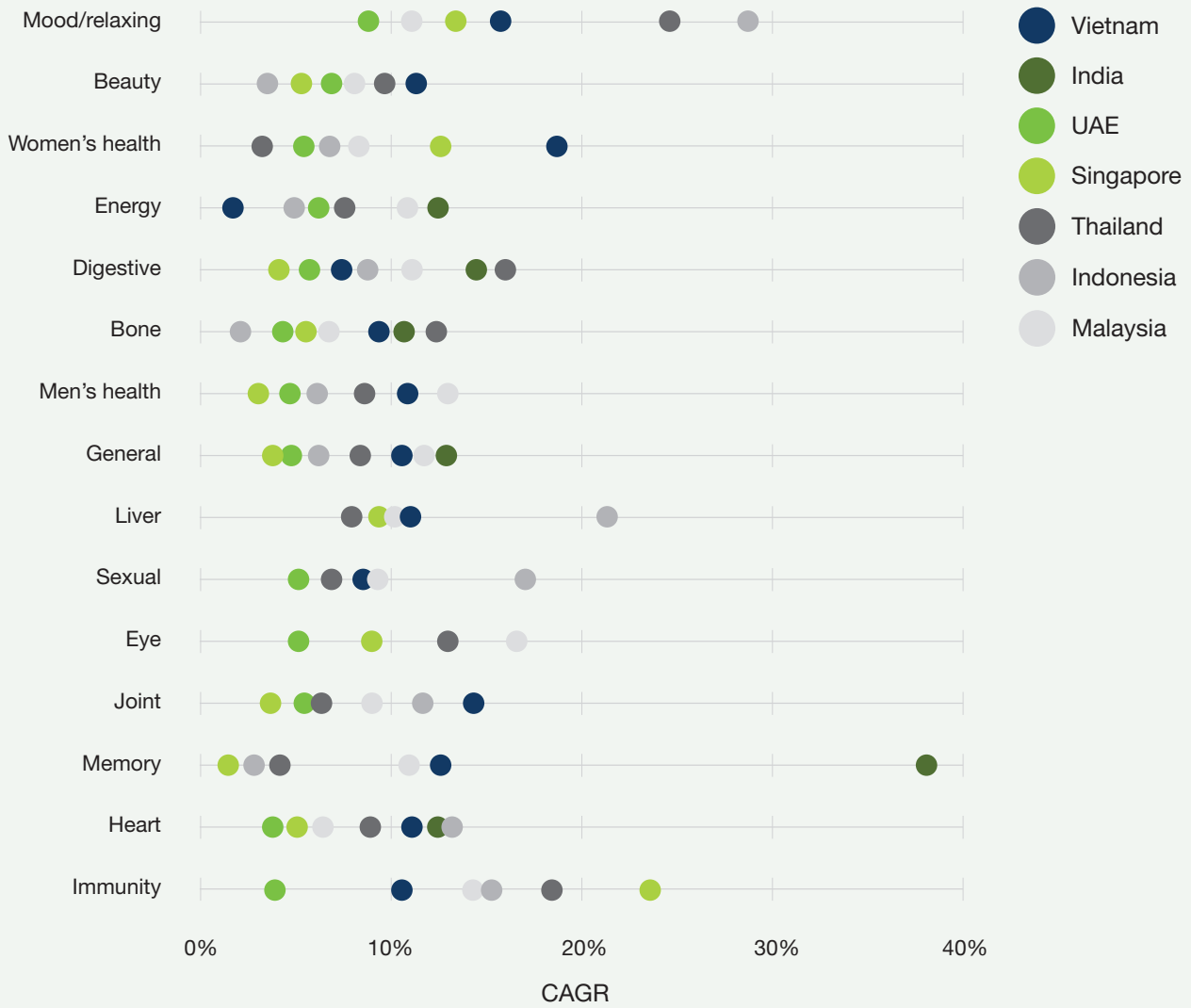


United Arab Emirates

\$0.21 billion (2024) / \$0.28 billion (2029)



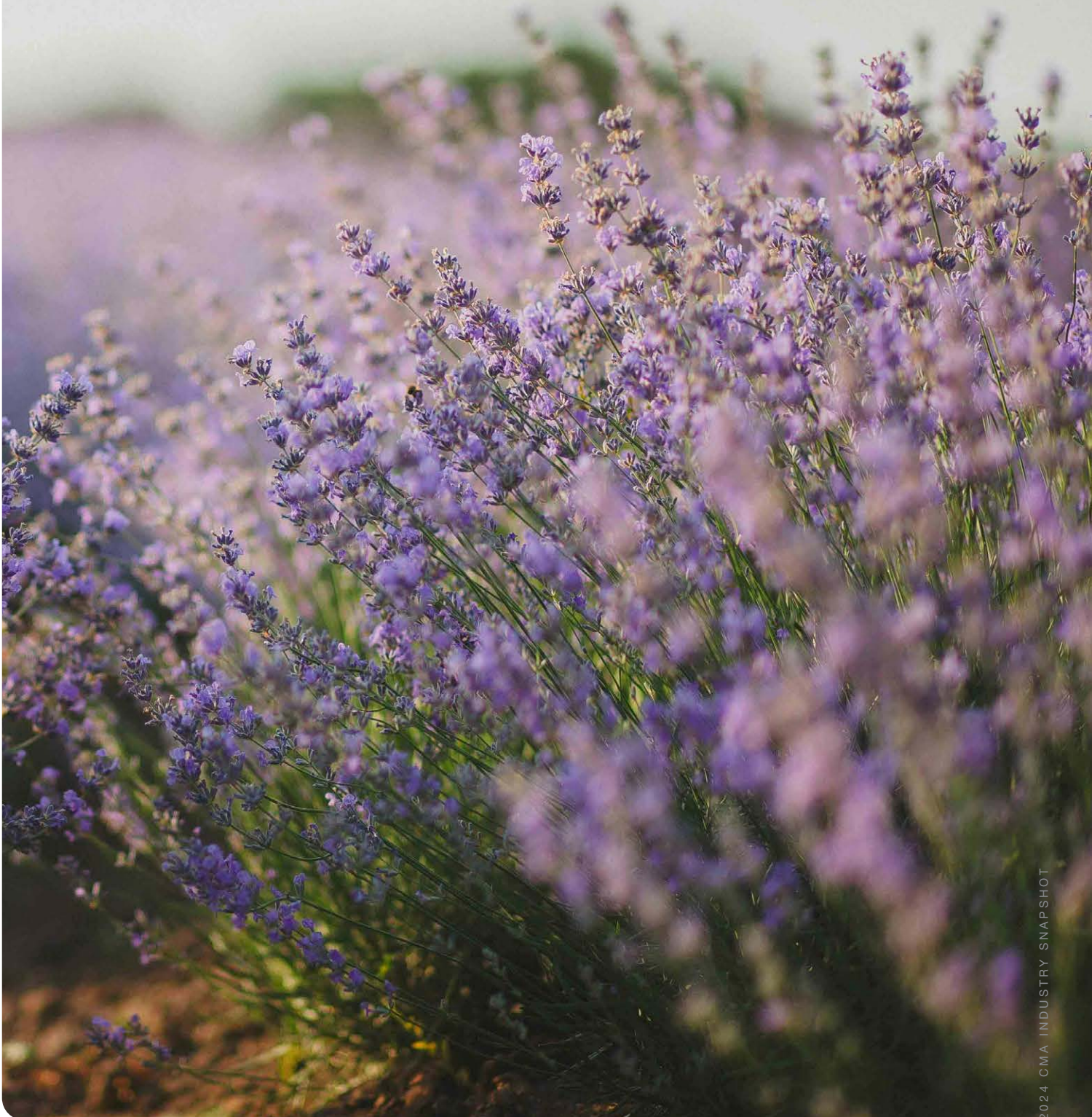
Vitamin and dietary supplement category growth by country (2019-24)



Source: Euromonitor International Consumer Health 2025 Market Data



“Australia’s complementary medicines are recognised around the world for being of the highest quality, safety and efficacy.”



International outlook

The global complementary medicines market has experienced significant growth in recent years. In 2022, this market was estimated to be worth \$325 billion and is forecast to reach \$418 billion by 2027.⁶

In 2021, the global spend on vitamins and supplements reached parity with over-the-counter (OTC) drugs. Although in subsequent years, sales of OTC drugs have outpaced VDS, global growth of VDS remains strong, supported by surging sales in Asia Pacific.⁷

Indeed, the Asia Pacific region has been the largest contributor to global demand, accounting for 57% of growth in the VDS category between 2020 and 2023, focused around liver health, heart health, sexual health and immune health.



\$325 billion

The global complementary medicines market in 2023



forecast to reach **\$418 billion by 2027**

Key trends and drivers

Across the world, the ageing population is a major driver of the complementary medicines market with the global population of individuals aged 65 and over projected to reach 1.5 billion by 2050. Demand for products that support cardiovascular, bone and preventive health are expected to increase.

Not only is the world getting older, it is getting more wealthy, with the global middle-class increasing from 31% of the population in 2011, to 40% in 2019. This increase in disposable income is allowing more consumers to invest in their health and wellbeing.

Additionally, chronic diseases remain prevalent globally, accounting for 60% of deaths and 43% of the global disease burden, which is pushing demand for VDS products that promote preventive health and general wellbeing.

The rise of e-commerce has also played a significant role in driving market growth, making it easier for consumers to purchase complementary medicines online.

Global inflation is impacting consumer choice, as more people seek multifunctional supplements that address a range of health needs without requiring people to purchase multiple products. Manufacturers have responded to this demand by developing new formulations or repositioning existing products.

Women's health remains popular globally, growing by 14% in North America, 10% in Asia Pacific, and 9% in Western Europe in 2023. That year saw massive demand for tailored solutions addressing a wide range of conditions across women's lifespans, including sexual wellness, menstruation, maternal and reproductive health, menopause and healthy ageing products.

The beauty from within trend is driving sales of VDS across the world. While Asia Pacific still dominates gross sales across the beauty category, sales of beauty supplements grew 24% in North America between 2018 and 2023, as consumers sought products addressing a narrower range of beauty concerns, such as hair, nail, skin and gut health.



The global gummy market (USD)

\$24.6 billion

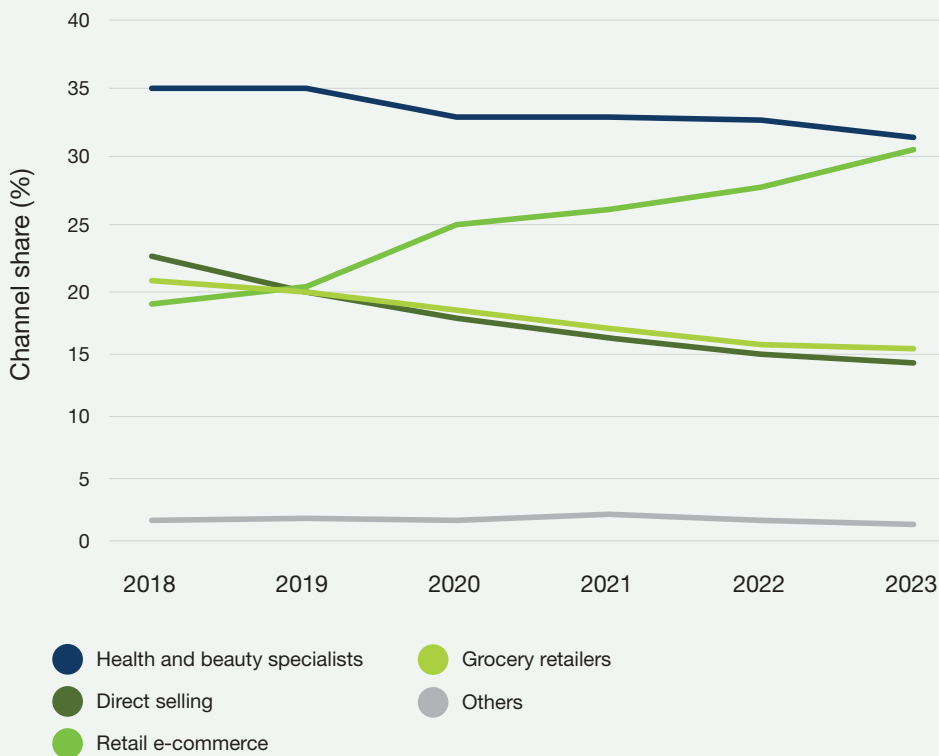
in 2023 and projected to expand to \$48.5 billion by 2028, representing a projected CAGR of 14.5%

Sports nutrition outpaced its strong historical CAGR of 10% (from 2010 to 2023), with over 14% growth in 2023, remaining the fastest growing consumer health category. Manufacturers have sought growth opportunities by broadening the purported benefits of their sports nutrition products.

In 2023, the global gummy market was estimated to be worth USD 24.6 billion and is projected to expand to USD 48.5 billion by 2028, representing a projected CAGR of 14.5%, driven by especially high demand in Asia Pacific. This demand is being pushed by consumer preference for the more enjoyable tastes and ease of consumption that gummies offer over traditional supplement formats.⁸

Mental health was the second most popular category for new supplement launches globally (after immune health) over the last five years, representing around a quarter of new products. Younger consumers, in particular, are focussing more on mental health, with approximately 30% of Millennial and Gen Z seeking a healthier lifestyle to support better mental wellbeing (in contrast to 27% of Generation X and 23% of Baby Boomers).⁹

Global vitamin and dietary supplements distribution channel



Source: Euromonitor International. (2023). World Market for Consumer Health.

8. Markets and Markets. (2023). Gummy Supplement Market
9. Glanbia Nutritionals. (2023). Top 5 Supplement Trends for 2024.

Industry opportunities and challenges

As the Australian complementary medicines industry grows, it faces a range of opportunities as well as challenges.

01 Strengths

Brand Australia

Australia's reputation for clean, green products and high regulatory standards is a major asset. This strong brand image helps drive exports and attract domestic consumers.

Industry outperformance

The complementary medicines industry has consistently outperformed the broader Australian economy, due to the strong demand for these products.

Innovation

There is ample opportunity for innovation in both functional ingredients and product delivery formats. Australia's world-leading research capabilities, exemplified by institutions like Western Sydney University's NICM Health Research Institute and Southern Cross University's National Centre for Naturopathic Medicine, can support this innovation.

Manufacturing excellence

Australia's highly skilled manufacturing capabilities, which comply with international standards including PICS and GMP, provide a competitive advantage.

Strict regulatory standards

The country's stringent regulatory framework under the Therapeutic Goods Administration helps to ensure product safety and efficacy, further enhancing Australia's reputation for product excellence.

02 Challenges

Regulatory burden

While strict regulations are essential for protecting consumers, they can also be financially costly and hinder industry competitiveness and innovation. The industry advocates for a balanced approach that ensures safety and provides consumers with access to products they want, while also supporting industry growth.

Research and innovation funding

Ongoing insufficient government funding for research and development is a handbrake on innovation. Increased investment is crucial for the industry's long-term success, international competitiveness and job creation.

Supply chain risks

The industry's reliance on imported raw materials creates vulnerability to supply chain disruptions. Promoting local manufacturing capacity for raw materials can mitigate these risks, while also contributing to jobs and the economy.

Manufacturing costs

High establishment costs, compliance requirements and limited government support can impact the competitiveness of Australian manufacturing. Greater government support and regulatory reform are needed.

Workforce shortages

The industry faces a shortage of skilled workers in areas such as research product development, laboratory skills, GMP compliance and manufacturing. Addressing this skills gap through targeted training programs is essential.

Sustainability

Towards net zero

The complementary medicines industry has a deep reliance on the natural environment to ensure high quality, efficacious products. The provenance of ingredients used across our industry spans a broad geographic range but all share a vulnerability to climate impacts.

As the climate crisis intensifies, the industry faces significant sustainability challenges. Extreme weather events, such as heatwaves, bushfires, floods, and cyclones, can disrupt supply chains, affect ingredient quality, and exacerbate health issues.

Of the 50,000 herbs used therapeutically, 15,000 are faced with extinction at a time when the community's nutritional deficiencies will be exacerbated as our planetary boundaries are breached.

To help address these challenges, CMA has set a goal for members to measure their carbon footprint and commit to a decarbonisation target by 2025. By working together, industry stakeholders can develop strategies to reduce their environmental impact and build a more resilient supply chain.

Addressing modern slavery

Our industry's reliance on global supply chains also exposes it to the risk of human exploitation. Modern slavery encompasses a range of exploitative practices, such as forced labour and human trafficking, which can infiltrate various stages of production and distribution.

The industry's reliance on raw materials sourced from different parts of the world also creates the potential to make us vulnerable to these unethical practices.

Businesses within the industry must implement robust due diligence processes to identify and mitigate risks of modern slavery in their operations. Collaboration and information sharing among industry stakeholders are essential for addressing this pressing issue.

The path forward

CMA is taking proactive steps as well as partnering with members and the greater industry for positive global impact.

Our initiatives are built around four key pillars::

Reduce waste and support communities in need

CMA is leading an industry initiative to address the issue of wasted goods. By identifying areas where waste can be minimised or repurposed, we aim to make a positive impact on both the environment and communities in need. This includes diverting excess saleable stock to communities that can benefit from these products, and encouraging businesses to commit to actions that reduce waste.

Threats to nature

We are committed to addressing climate change and biodiversity loss, and encourage members to take action by offering training modules to help them develop the necessary skills to contribute to sustainability efforts.

Better outcomes for people

We are committed to promoting human rights throughout the complementary medicines supply chain. We will continue to invest in capability uplift to address human rights risks and ensure ethical practices, while also striving for greater diversity within CMA's leadership and decision-making bodies.

Circular economies

We are playing a leading role in promoting a circular economy within the complementary medicines industry. By leveraging the scale of the industry, we are working with retailers and brands to reduce packaging waste and explore opportunities for circularity.

CMA industry achievements



CMA members highly value our advocacy and lobbying work to support the ongoing growth of our industry. This includes working to achieve appropriate regulation, while still ensuring evidence-based medicines are of the highest levels of safety and quality.

CMA's successful work in this area has recently included:

- Pushing for the TGA to reassess its risk-based approaches to evaluating evidence and enforcing advertising rules.
- Achieving improvements to the AUST L(A) evidence guidelines to support applications based on existing literature and allowing a broader range of clinical research for product approvals.
- Strongly advocating for risk-based approaches to large solid oral complementary medicine dosage forms.
- Achieving changes in the TGA's approach to enforcing rules on advertising of prohibited vitamin names (including vitamins K2 and B3).
- Reducing regulatory impacts and manufacturing and labelling requirements for probiotics, including maintaining appropriate testing methods for multi-strain probiotics.
- Improving fairness in TGA processes for the industry regarding effectiveness or quality outcomes for complementary medicines.
- Obtaining clarification and assurance on the TGA's approach to declaring allergens on labels.
- Advocating for clearer TGA processes for keeping Australian Register of Therapeutic Goods (ARTG) product entries up-to-date, in line with established policy and practice.
- Preventing impractical manufacturing testing requirements for complementary medicine ingredients.
- Contributing to the development of TGA manufacturing and Good Manufacturing Practice (GMP) technical guidelines for complementary medicines, and advocating for clarity to avoid misinterpretation.
- Successfully achieving changes to the Food-Medicine Interface Guidance Tool to benefit the industry and improve clarity.
- Providing scientific, evidence-based reasons to support continued safe access to several herbal ingredients.
- Securing TGA agreement to implement lower cost, simplified pathways for minor changes to existing ingredient requirements.
- Pushing for changes and clarifications to manufacturing requirements to reduce regulatory burden and protect member confidentiality.

In addition to regulatory advocacy, CMA continues to support our members and the industry through:

01

Government engagement

Broad collaboration with government bodies to shape policies that benefit the industry

02

Research promotion

Encouraging research and innovation in complementary medicines

03

Quality and safety standards

Upholding high standards for product quality and safety

04

Export support

Assisting members in accessing international markets and building engagement with foreign stakeholders

05

Education and training

Providing resources for ongoing education and training in the sector

Outlook

The future outlook for Australia's thriving complementary medicines industry is bright, driven by several positive factors that position it for continued growth and success. This includes the industry's strong market presence, global demand, innovative practices, regulatory excellence and focus on preventive health measures.

Strong market growth and economic contribution

Australia's complementary medicines industry is experiencing robust growth, with annual revenues reaching approximately \$6.2 billion. The Australian market is expected to grow 5.7% (CAGR) to 2029. This growth is largely fuelled by increasing consumer demand for natural health solutions and the industry's reputation for producing high-quality, safe products.

The sector is a significant contributor to the Australian economy. It is one of the few manufacturing sectors to largely remain on domestic soil, contributing to Australia's economic resilience and advanced manufacturing capabilities.

Global demand and export opportunities

Exports are expected to be a key driver of future growth. Having already achieved significant export growth in recent years, the industry aims to further expand its presence in international markets. The Asia Pacific region, with its large and growing middle class, represents a particularly promising export opportunity.

Australia's reputation for producing high-quality, safe products gives it a competitive advantage to capitalise on increasing global demand for natural health products.

Innovation and consumer trends

Innovation is at the heart of the industry's success and will be crucial for capturing new opportunities. The demand for products that support women's health, mental health and beauty from within is driving innovation. Australian manufacturers are also at the forefront of developing new delivery formats, such as gummies, and exploring personalised nutrition solutions.

The industry is also embracing sustainability, with many companies taking important steps to reduce their environmental impact and ensure ethical supply chains.

Regulatory excellence

Under the regulation of the Therapeutic Goods Administration (TGA), Australia's requirements for complementary medicines are the strictest in the world. This ensures that products meet the highest safety and quality standards, which bolsters consumer demand and trust both domestically and internationally.

Focus on preventive health

The industry is well-positioned to capitalise on global health trends, including the growing emphasis on preventive health and holistic wellbeing. With over 75% of Australian households using complementary medicines, these products are integral to preventive health strategies that can alleviate the burden on the healthcare system.

With our continued focus on quality and innovation, the Australian complementary medicines industry is well positioned for sustained growth, increased exports and to continue making significant contributions to both the economy and public health.



CMA membership

CMA represents members from across the whole complementary medicines industry supply chain. We offer a platform for collaboration and growth.

Membership with CMA is not only an investment in your organisation, but a contribution to shaping the future of the industry, and the wellbeing of all Australians and people around the world.

Our members include:

1. Product sponsors
2. Manufacturers
3. Raw material suppliers
4. Exporters
5. Retailers
6. Wholesalers
7. Consultants
8. Researchers
9. Direct and multi-level marketers

Why join CMA?

Advocacy and impact

As a member, CMA is your direct voice to government, and we ensure issues that affect our industry are front and centre in policy discussions and decision making.

Our expert team of regulatory professionals sit on key government committees, including all TGA policy and technical working groups. This allows us to directly influence the development of new regulations and guidelines that affect your business.

Through our strong advocacy, we've delivered significant wins for our members, in particular through appropriate regulation.

Stay informed and connected

We keep you up-to-date with the latest news, regulatory updates, and technical alerts relevant to your organisation. You can attend exclusive member-only industry events, connect with like-minded professionals, gain insights from leading experts, and promote your brand.

We also facilitate a range of working groups, committees and networking opportunities so you can collaborate with industry peers and help influence industry advocacy. And the coveted CMA Annual Industry Awards are your chance to be recognised and celebrated for your achievements and contribution to the industry.

Access valuable resources

Gain access to member-exclusive resources, including template questionnaires, complimentary access to IMgateway (online medical resource tool), and a comprehensive library of industry materials.

To learn more and to join CMA, please contact membership@cmaustralia.org.au.

CMA events

CMA hosts and participates in a dynamic calendar of industry events, providing exclusive opportunities for members to connect, learn and contribute to shaping the future of holistic health.

CMA Annual Conference and Awards

The CMA Annual Conference is the premier event for the complementary medicines industry in Australia. This flagship event offers a unique platform for networking, learning and shaping the future of holistic health. Attendees engage in thought-provoking discussions, connect with industry professionals and gain valuable insights from leading experts.

The conference culminates in the CMA Awards Dinner, a prestigious event that recognises and celebrates the outstanding achievements and contributions of members within the industry.

CMA Innovation Day

CMA Innovation Day is an annual event dedicated to showcasing the latest trends and innovations in the complementary medicines industry. With a curated lineup of speakers and insightful discussions, this event provides valuable networking opportunities for members and fosters a culture of innovation within the sector.



CMA Regulatory Day

Our Regulatory Day is an annual training event that offers updates on key regulatory developments both in Australia and in key export markets. Featuring insights from TGA representatives, this event ensures that members are informed about the latest regulations affecting the industry.

Healthplex

CMA hosts the Australian Pavilion at Healthplex in Shanghai, a premier trade exhibition for the complementary medicines and health products industry in China. The event attracts a significant number of visitors from both domestic and international markets. CMA hosts a small number of members to showcase at the event, which generates considerable interest for their products and Australia's complementary medicines as a whole.

Other events

In addition to these flagship events, CMA participates in various industry events across the globe. These events provide opportunities to connect with international stakeholders, showcase Australian products and services, and stay informed about global trends in the complementary medicines sector.



Member testimonials



“CMA has been an invaluable resource as we continue to navigate the dynamic landscape of the complementary medicines industry and ongoing reform to therapeutic goods regulation. Individual team members on working groups can stay abreast of regulatory and policy impacts and to respond effectively to consultation. They have access to experts that grow their own understanding and enable them to better support our business.”

Alastair Symington, Blackmores

“Our teams value the access to timely and accurate technical advice on domestic and international regulations affecting our industry. The CMA’s ability to mobilise a clear industry position on complex and technical issues and represent the sector when necessary has been crucial to enabling the industry’s growth and credibility.”

Elise Giles, H&H Group (Swisse)

“One of the standout benefits of being part of CMA is the opportunity to sit on industry committees and work directly with peak government departments and bodies. This direct involvement allows us to contribute to shaping the future of the industry while ensuring our voice is heard at the highest levels. Additionally, through CMA, we often ‘hear it first’ regarding policy updates or regulatory changes. This early access to critical information provides us with a competitive edge and the ability to stay ahead of industry developments.”

Patrick Antolak, TSI Group

“Recently, we faced a significant challenge when a regulatory framework issue forced us to pull a large advertising campaign due to ad restrictions on a specific ingredient. Thanks to CMA’s efforts, we gained direct access to key decision-makers at the Therapeutic Goods Administration (TGA) – a crucial connection to clarifying and addressing the issue. With our real-world example and CMA’s long-standing advocacy for the ability to advertise this ingredient, we were able to reach a resolution in less than four weeks. The credibility that CMA has established was critical in navigating this challenge. We couldn’t have achieved this outcome alone.”

Cathy Hoy, Opella (Sanofi Consumer Healthcare)

“Lavida Pharmaceuticals is proud to be a member of CMA, an association that consistently champions excellence and innovation. CMA’s dedication to advocating for our industry, fostering collaboration, and offering valuable insights and networking opportunities has enhanced our business and helped us to forge invaluable partnerships.”

Natasha Flynn, Lavida Pharmaceuticals

“CMA has played an instrumental role in fostering connections and relationships within the industry. Through CMA’s events and networking opportunities, we have been able to collaborate with like-minded businesses, explore new opportunities, and strengthen our position within the market. CMA truly serves as a vital resource and advocate for our industry, and we are grateful for the support and benefits it provides.”

Ann Cattelan, Go Vita Group



CMA Members

as at January 2025

Activated Probiotics	Engel Hellyer & Partners	Kaneka	R & T Australia
ADM Australia	Euromed	Key Sun Laboratories	Raydel Australia
Advanced Wellness Regulatory Solutions	Evelyn Faye Nutrition	Lavida Pharmaceuticals	Sacco System Australia
Aker Biomarine	Evidence Based Probiotics	Legacy Health Consulting	Sensient Technologies
Allure Wellness Consulting	Exergy	Life Space Group	SFI Australasia
Amway of Australia	Factors Group	Lipa Pharmaceuticals	Sirio Pharma
Appharma Consulting	Ferngrove Pharmaceuticals	Lonza	Skuny Bioscience
Atomic Regs	Forte Information Solutions	MCC Label	Smart Collaboration
Australian by Nature	Fountain Health & Bulk Foods	Medipaq	South Australian Shark Cartilage
Avicenna Consulting	Freeman Nutra Group Oceania	Melrose Group	Spectrumceuticals
AWS360	GC Rieber Oils Australia	Metagenics	Stiltec
BASF	Gelita Australia	Modere	Sunnyfield
Bega Bionutrients	Givaudan	National Institute of Complementary Medicine (NICM)	Swisse
Bio Concepts	Go Vita Group	National Pharma Pack	The 6AM Agency
Biogrund	Grøntvedt Biotech	Natural Product Centre	The Beauty Chef
BJP Laboratories	Hawkins Watts Australia	Natural Solutions	The Hut Group
Blackmores Group	Healthcare Product Specialists	Nature's Sunshine Products Australia	Trade Health
Bluegum (Phytologic)	Health Ingredients Co.	Neo Health (OTC)	Transchem
Botanic Healthcare	Henniger Health Consulting	Novonesis	Trapeze Associates
Brauer Natural Medicine	Herbalife	Nuzest Natural Products	TSI Group
Brenntag	Herbs of Gold	NXT USA	Ultra Labels
bWellness	Hivita Happy Energy	Oak Consultancy	Unibio Probiotics
Caruso's Natural Health	Homart Pharmaceuticals	Opella (Sanofi)	USANA Australia
Ceebe Health & Nutrition	HPTLC Association	Optimal RX	Vidya Australia
Chemical Ways	IFF	Owen Homoeopathics	Vilco
Chemist Warehouse Group	IMCD Australia - Network Nutrition	Pacific Resources	Vitaco Health
CN Quality Consulting	In Focus	Pathway International	Vitex Pharmaceuticals
Complementary Medicines Group	Innovative Herbal Products	PharmaCare Laboratories	Wecare Probiotics
Comvita Australia	Insurance Made Easy	Pharmaceutical Plant Company	Weleda Australia
Designs for Health	Integria Healthcare	Pharmako Biotechnologies	Well Founded
Direct Selling Australia	Interclinical Laboratories	Phytomed Medicinal Herbs	Yara Law
doTerra	John Miller Consulting	Prestige Blending	Young Living Essential Oils
dsm-firmenich	JS Health Vitamins	Queanbeyan Mega Health	Zipform Packaging
DTS Regulatory Consultants			
Eimele			



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