



Health and Wellness in Australia

December 2025

Table of Contents

EXECUTIVE SUMMARY

Health and wellness in Australia pivots towards sugar reduction, functionality and credible everyday benefits

INDUSTRY PERFORMANCE

Sugar reduction and metabolic health concerns shape category-wide performance
Functionality, gut health and protein move health and wellness beyond avoidance

WHAT'S NEXT?

Mainstream integration of functional, lower-sugar and clean-label products will drive future growth

COUNTRY REPORTS DISCLAIMER

HW Hot Drinks in Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Functional innovation and clean-label expectations redefine hot drinks wellness

INDUSTRY PERFORMANCE

Functional benefits gain momentum across other hot drinks and tea
Natural positioning remains relevant but increasingly overlaps with premium and sustainable cues
No sugar expands from indulgent powders into more everyday hot drink occasions

WHAT'S NEXT

Functional hot drinks expand into targeted wellbeing, including mental health
Natural hot drinks recover through sharper positioning and stronger value propositions
No sugar becomes more mainstream as taste improves and permissible indulgence grows

CATEGORY DATA

- Table 1 - Sales of Hot Drinks by Health and Wellness Type: Value 2020-2024
- Table 2 - Sales of Hot Drinks by Health and Wellness Type: % Value Growth 2020-2024
- Table 3 - Company Shares of Organic Hot Drinks (Biggest HW Type in Global Hot Drinks): % Value 2020-2024
- Table 4 - Company Shares of Natural Hot Drinks (2nd Biggest HW Type in Global Hot Drinks): % Value 2020-2024
- Table 5 - Company Shares of Gluten Free Hot Drinks (3rd Biggest HW Type in Global Hot Drinks): % Value 2020-2024
- Table 6 - Company Shares of Good Source of Vitamins Hot Drinks (4th Biggest HW Type in Global Hot Drinks): % Value 2020-2024
- Table 7 - Company Shares of No Allergens Hot Drinks (5th Biggest HW Type in Global Hot Drinks): % Value 2020-2024
- Table 8 - Forecast Sales of Hot Drinks by Health and Wellness Type: Value 2024-2029
- Table 9 - Forecast Sales of Hot Drinks by Health and Wellness Type: % Value Growth 2024-2029

COUNTRY REPORTS DISCLAIMER

HW Soft Drinks in Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

The “sugar revolution” accelerates as functional benefits reshape innovation

INDUSTRY PERFORMANCE

Reformulation and functionalisation widen health and wellness appeal beyond carbonates
No sugar consolidates leadership across carbonates, sports drinks and energy drinks
Natural positioning holds up through clean labels, botanicals and “credible” functionality

WHAT'S NEXT

Sugar reduction and benefit-led hydration will drive health and wellness soft drinks growth
No sugar is expected to sustain strong growth as reformulation becomes the default
Natural is expected to remain steady, strengthened by clean labels and functional botanicals

CATEGORY DATA

Table 10 - Sales of Soft Drinks by Health and Wellness Type: Value 2020-2024
Table 11 - Sales of Soft Drinks by Health and Wellness Type: % Value Growth 2020-2024
Table 12 - Company Shares of No Sugar Soft Drinks (Biggest HW Type in Global Soft Drinks): % Value 2020-2024
Table 13 - Company Shares of Energy Boosting Soft Drinks (2nd Biggest HW Type in Global Soft Drinks): % Value 2020-2024
Table 14 - Company Shares of Natural Soft Drinks (3rd Biggest HW Type in Global Soft Drinks): % Value 2020-2024
Table 15 - Company Shares of Good Source of Vitamins Soft Drinks (4th Biggest HW Type in Global Soft Drinks): % Value 2020-2024
Table 16 - Company Shares of Gluten Free Soft Drinks (5th Biggest HW Type in Global Soft Drinks): % Value 2020-2024
Table 17 - Forecast Sales of Soft Drinks by Health and Wellness Type: Value 2024-2029
Table 18 - Forecast Sales of Soft Drinks by Health and Wellness Type: % Value Growth 2024-2029

COUNTRY REPORTS DISCLAIMER

[HW Snacks in Australia](#)

KEY DATA FINDINGS

2024 DEVELOPMENTS

Healthier snacking accelerates through protein, portion control and “permissible indulgence”

INDUSTRY PERFORMANCE

Health-conscious snacking broadens from restriction to “better for you” value and taste
Gluten free remains mainstream in savoury snacks, supported by ease of adoption and clear communication
Natural positioning gains relevance as consumers scrutinise ingredients and seek cleaner labels

WHAT'S NEXT

Health and wellness growth will be shaped by protein, healthier impulse occasions and tighter advertising controls
Gluten free is expected to grow steadily as portfolios widen and the claim remains a trusted shortcut
Natural is expected to expand through cleaner formulations and emerging challenger brands

CATEGORY DATA

Table 19 - Sales of Snacks by Health and Wellness Type: Value 2020-2024
Table 20 - Sales of Snacks by Health and Wellness Type: % Value Growth 2020-2024
Table 21 - Company Shares of Gluten Free Snacks (Biggest HW Type in Global Snacks): % Value 2020-2024
Table 22 - Company Shares of Vegetarian Snacks (2nd Biggest HW Type in Global Snacks): % Value 2020-2024
Table 23 - Company Shares of Organic Snacks (3rd Biggest HW Type in Global Snacks): % Value 2020-2024
Table 24 - Company Shares of Vegan Snacks (4th Biggest HW Type in Global Snacks): % Value 2020-2024
Table 25 - Company Shares of No Allergens Snacks (5th Biggest HW Type in Global Snacks): % Value 2020-2024
Table 26 - Forecast Sales of Snacks by Health and Wellness Type: Value 2024-2029
Table 27 - Forecast Sales of Snacks by Health and Wellness Type: % Value Growth 2024-2029

COUNTRY REPORTS DISCLAIMER

[HW Dairy Products and Alternatives in Australia](#)

KEY DATA FINDINGS

2024 DEVELOPMENTS

Digestive health, plant-based nutrition and sugar reduction reshape dairy wellness

INDUSTRY PERFORMANCE

Digestive health and functional positioning drive product development across dairy and alternatives
Good source of minerals remains a strong nutrition cue, supported by fortification in both dairy and plant-based
High protein expands beyond fitness into mainstream “everyday nutrition” consumption

WHAT'S NEXT

Digestive health, nutrient-enhanced plant-based and lower sugar renovation will drive future growth
Good source of minerals is expected to remain relevant, supported by fortification and ageing-related health priorities
High protein is expected to sustain momentum, with growth supported by multifunctional propositions

CATEGORY DATA

Table 28 - Sales of Dairy Products and Alternatives by Health and Wellness Type: Value 2020-2024

Table 29 - Sales of Dairy Products and Alternatives by Health and Wellness Type: % Value Growth 2020-2024

Table 30 - Company Shares of Organic Dairy Products and Alternatives (Biggest HW Type in Global Dairy Products and Alternatives): % Value 2020-2024

Table 31 - Company Shares of Good Source of Minerals Dairy Products and Alternatives (2nd Biggest HW Type in Global Dairy Products and Alternatives): % V

Table 32 - Company Shares of Gluten Free Dairy Products and Alternatives (3rd Biggest HW Type in Global Dairy Products and Alternatives): % Value 2020-20

Table 33 - Company Shares of Lactose Free Dairy Products and Alternatives (4th Biggest HW Type in Global Dairy Products and Alternatives): % Value 2020-2

Table 34 - Company Shares of Low Fat Dairy Products and Alternatives (5th Biggest HW Type in Global Dairy Products and Alternatives): % Value 2020-2024

Table 35 - Forecast Sales of Dairy Products and Alternatives by Health and Wellness Type: Value 2024-2029

Table 36 - Forecast Sales of Dairy Products and Alternatives by Health and Wellness Type: % Value Growth 2024-2029

COUNTRY REPORTS DISCLAIMER

[HW Cooking Ingredients and Meals in Australia](#)

KEY DATA FINDINGS

2024 DEVELOPMENTS

Health-led renovation accelerates across sauces, oils and convenient meals

INDUSTRY PERFORMANCE

Clearer labelling and reformulation support sugar avoidance and healthier everyday choices
Gluten free becomes an everyday expectation, supported by mainstream innovation and strict compliance
Natural and “less processed” cues gain importance, reinforced by trust and provenance

WHAT'S NEXT

Value-led health innovation will centre on cooking confidence, convenience and “better for you” staples
Gluten free is expected to keep growing through broader formats and more family-friendly innovation
Natural is expected to remain resilient, strengthened by anti-ultra-processed sentiment and transparency demands

CATEGORY DATA

Table 37 - Sales of Cooking Ingredients and Meals by Health and Wellness Type: Value 2020-2024

Table 38 - Sales of Cooking Ingredients and Meals by Health and Wellness Type: % Value Growth 2020-2024

Table 39 - Company Shares of Organic Cooking Ingredients and Meals (Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2020-2024

Table 40 - Company Shares of Gluten Free Cooking Ingredients and Meals (2nd Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2020-2024

Table 41 - Company Shares of Vegetarian Cooking Ingredients and Meals (3rd Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2020-2024

Table 42 - Company Shares of Vegan Cooking Ingredients and Meals (4th Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2020-2024

Table 43 - Company Shares of Natural Cooking Ingredients and Meals (5th Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2020-2024

Table 44 - Forecast Sales of Cooking Ingredients and Meals by Health and Wellness Type: Value 2024-2029

Table 45 - Forecast Sales of Cooking Ingredients and Meals by Health and Wellness Type: % Value Growth 2024-2029

COUNTRY REPORTS DISCLAIMER

HW Staple Foods in Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Functional staples gain visibility as front-of-pack cues influence purchase decisions

INDUSTRY PERFORMANCE

Functional benefits and front-of-pack signalling shape staple foods innovation
High fibre evolves into a gut health narrative rather than a standalone claim
High protein expands across everyday staples, but value sensitivity shapes how it is used

WHAT'S NEXT

Weight management, no added sugar cues and clearer labelling shape future staple foods demand
High fibre is expected to grow modestly, with differentiation depending on functional storytelling
High protein will remain important, but claim usage will depend on category fit and consumer expectations

CATEGORY DATA

Table 46 - Sales of Staple Foods by Health and Wellness Type: Value 2020-2024

Table 47 - Sales of Staple Foods by Health and Wellness Type: % Value Growth 2020-2024

Table 48 - Company Shares of Gluten Free Staple Foods (Biggest HW Type in Global Staple Foods): % Value 2020-2024

Table 49 - Company Shares of Organic Staple Foods (2nd Biggest HW Type in Global Staple Foods): % Value 2020-2024

Table 50 - Company Shares of High Fibre Staple Foods (3rd Biggest HW Type in Global Staple Foods): % Value 2020-2024

Table 51 - Company Shares of Vegetarian Staple Foods (4th Biggest HW Type in Global Staple Foods): % Value 2020-2024

Table 52 - Company Shares of No Allergens Staple Foods (5th Biggest HW Type in Global Staple Foods): % Value 2020-2024

Table 53 - Forecast Sales of Staple Foods by Health and Wellness Type: Value 2024-2029

Table 54 - Forecast Sales of Staple Foods by Health and Wellness Type: % Value Growth 2024-2029

COUNTRY REPORTS DISCLAIMER

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/health-and-wellness-in-australia/report.