Complementary Medicines Australia

ANNUAL REPORT

2017-2018

ABN 49 169 036 088

www.cmaustralia.org.au
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Message from the President

It is my pleasure to report the significant results achieved by CMA over the last 12 months, and indeed the success we’ve seen during the time that I have been privileged to be CMA’s President.

I have seen major changes in the industry over this period. I’m particularly impressed with the growing presence of our industry and rise of CMA’s international profile in recent years. Our exports have doubled in just under two years and overseas regulators are interested in learning about the Australian regulatory system, considered by many countries as being innovative and forward thinking, and a benchmark for consumer protection.

Our China engagement program is a vital element in our industry’s development strategy, leveraging strong Chinese demand for Australian complementary medicines. This year, CMA hosted the inaugural Australian Pavilion at Healthplex 2018, showcasing well-known Australian complementary medicines brands. I was honoured to represent our industry as CMA President and to be able to witness firsthand our collective success at this international event.

As the leading voice for our industry, CMA has successfully driven our advocacy agenda, especially in the area of regulatory reform. In February 2018, the ground-breaking Therapeutic Goods Amendment Bill 2017 was passed by Parliament. CMA has long supported the establishment of an intermediate pathway to encourage investment in research and provide for a much needed regulatory protection for propriety information.

I would like to thank our members for their support, and for sharing the vision of building a sustainable industry, one that’s able to continue to grow its contribution to Australia’s economy and to health outcomes for our communities.

A special thanks to the Board of Directors for their commitment, skills, and knowledge in driving our strategy for the long term success of our industry.

I also would like to thank our CEO, Carl Gibson, and the team at CMA for their hard work and commitment to the industry. Congratulations for being shortlisted as a finalist for the ‘Association of the Year Award’ judged by the Associations Forum. I would like to say that this is truly well-deserved.

This is my final report as the President after a rewarding three years in the role, and I am delighted to say that CMA is in a very healthy position and poised to build upon our recent successes. I look forward to seeing the future strong progress of both CMA and our industry.

Dusko Pejnovic
CMA President

[Image of Dusko Pejnovic]
Message from the Chief Executive

It has been a truly landmark year for the complementary medicines industry.

A new regulatory regime has now been introduced – the biggest reforms in over 25 years, designed to reward innovation and protect research. Australia now leads the world in terms of progressive legislation that encourages growth and rewards investment.

CMA has been pushing hard to secure these reforms for many, many years – and together we have designed and implemented reforms that will guide our industry for the next 25 years.

CMA also organised our very first Australian Pavilion at HealthPlex in Shanghai, China, showcasing the Australian industry and our high quality products to our major trading partner. Australian products are the envy of the world because of their quality, safety and efficacy – and CMA is working hard to make sure that the opportunity is available to all our members, especially for those that are just embarking upon building their presence in China.

CMA also exhibited at Supply Side West and the Naturally Good Expo. We led two trade delegations to China, and we plan to run a trade mission to India this year and Indonesia in the future.

Our exports have more than doubled in just two years – and we are aiming to do the same again over the next two years, capitalising on the export growth opportunity for Australian products.

CMA has been working with practitioner groups to ensure that we support healthcare professionals, who are often the front line with consumers, providing essential advice and guidance. We have been proud to stand side by side on campaigns to keep health fund rebates and traditional evidence claims.

Retailers also received a win during the year with Hemp re-categorised at long last for use as a food. A three year campaign by the CMA has resulted in a new category being added to the retail sector, providing consumers with access to a food that has been described as a nutritional powerhouse.

Our latest industry audit shows that we are now a $4.9 billion industry in Australia. We have come a long way together over the last five years in my role as CEO; revenues have doubled, exports go from strength to strength, and there is a growing acceptance of the benefits of our quality therapeutic complementary medicines as an element of preventive health.

I am very grateful to the CMA Board of Directors for their strategic direction, advice and guidance. I want to acknowledge and thank Wayne Coote for his many years of service to the Board as he completes his maximum term this year. And a very big vote of thanks to Dusko Pejnovic for his vision, enthusiasm and friendship over the last there years as our President.

Finally, a huge thanks to the whole CMA Secretariat who work so hard on your behalf each and every day driving change and progressing the preventative health care agenda.

Carl Gibson
CMA CEO
We are currently seeing the biggest changes to the regulatory environment for over a quarter of a century, it is right that we invest in services that will help you our members.

My heartfelt thanks to Carl, Carol and Phil and the whole CMA team who work so hard to ensure that we have a thriving Association that goes from strength to strength.
Dusko Pejnovic  
President  
Lipa Pharmaceuticals

Sue Hogan  
Vice President  
Health World  
Resigned Jan 2018

Paul Mannion  
Vice President  
Blackmores  
Appointed Jan 2018

John Baker  
Treasurer  
Go Vita Springwood

Alan Brindell  
Sanofi Australia  
Appointed Oct 2017  
Resigned Mar 2017

Dr Aniss Chami  
Vitex Pharmaceuticals  
Appointed Mar 2018

Ben Rowe  
Brauer Natural Medicine

Carolyn Barker AM  
Endeavour Learning Group  
Resigned Oct 2017

Craig Fallshaw  
Complementary Medicines Group  
Appointed Oct 2017  
Resigned Jan 2018

Daniel Baden  
Biomedica  
Appointed Oct 2017

Howard Biggs  
PharmaCare Laboratories  
Appointed Feb 2018

Ian Chant  
Aker BioMarine Australia

John Kavanagh  
Integria Health Care

Justin Howden  
Swisse

Nathan Cheong  
Bioceuticals  
Resigned Oct 2017

Paula Hann  
Metagenics  
Appointed May 2018

Sally Brumley  
Queanbeyan Mega Health & Leura Health Foods  
Resigned Oct 2017

Wayne Coote  
Pathway International

Carl Gibson  
Complementary Medicines Australia
CMA Vision

Vision 2020
Australia
The Natural World Leaders

Stabilise
2014 – 2015
- Stabilise Finances
- Improve Team Morale
- Right people in the right roles
- Connect with Members
- Finalise Education Program
- Develop Advocacy and Deregulation Agenda
- Start to drive the issues that matter to our members
- New Brand and Identity

Energise
2016-2019
- 2020 Strategic Plan in Place:
  Vision, Mission, Goals
  CMA the lead voice for CMs
  CMA the Industry Advocate
  Strengthen Membership
  Annual Revenue $2m+
  Double Exports Revenue
  Drive Deregulation & Advocacy Agenda
  Collaborate with Leading Researchers and Educators

World Leaders
2020
- CMA the go-to Peak Body, Champion and Campaigner for CMs
- Australia World Leading:
  - Innovation
  - Manufacturing
  - Quality CM Products
  - Streamlined Regulatory System
  - Confident Industry
  - Informed Consumers
  - Five Star Research & Science Base
  - Globally Recognised for Reputation
Australia’s Complementary Medicines Industry

$4.9

Billion Revenue (AUD)

$2.0 billion Growth over 5 Years

Vitamin & Dietary Supplement (VDS) category alone has doubled over the last 10 years

Jobs supported by the complementary medicines industry

36,000

Natural health practitioners

82

Manufacturers, paying $170 million in wages

3.9%

2017 expected annual growth rate for manufacturing sector

Cranberry 6.90%
Chlorophyll 7.40%
Calcium 9.10%
Propolis 9.60%
Probiotics 10.2%

The top 5 fastest growing dietary supplement ingredients 2016/17

Complementary medicines are sold through:

5,500 pharmacies
3,500 supermarkets
500 health food stores

8.1 Million regular consumers in Australia

The top 5 dietary supplement categories by share in 2016/17

General Health 17.6%
Heart Health 13.7%
Joint 13.6%
Digestive 9.0%
Women’s Health 8.0%

New ingredients approved in 2017, driving development of innovative new products

Vitamin & Dietary Supplements: $2.77 billion
Sports Nutrition: $1.0 billion
Herbal/Traditional Products: $0.69 billion
Weight loss: $0.43 billion
Advocacy:

CMA has had a busy year in Regulatory Affairs with the introduction of the largest regulatory change to the sector in over 20 years through the Therapeutic Goods Amendment (2017 Measures No. 1) Act 2018, in March.

The new Act incorporated a new TGA-assessed evaluation pathway for listed medicines, allowing low risk complementary medicines to make claims for health benefits in serious conditions and other higher level claims, a ground-breaking ability for the complementary medicines sector. CMA has worked with academics and senior industry representatives to make significant contributions to the development of the resulting efficacy guidelines and accompanying market protection mechanisms to protect the intellectual capital of sponsors.

A CMA-developed initiative saved the complementary medicines industry over $15 million in TGA application fees and uncounted hours of business regulatory resources by preventing the up-regulation of hundreds of calcium, vitamin D and folic acid medicines with claims for osteoporosis and pregnancy neural tube defects. These medicines, with a long-established history of use and efficacy, remain in the listed medicine pathway.

CMA continued to drive a number of positive policy developments for industry, including vastly improved amendments to the new Advertising Code, the retention of low risk vitamins and minerals within the TGA medicine framework, improved consultation mechanisms and clearer policies for changes to listed medicine Permissible Ingredients and Permissible Indications, and the development of new Technical Guidance Documents for the new Code of GMP.
Leadership:

CMA was pleased to be shortlisted as a finalist for the “Association of the Year Award”. This was great recognition for the hard work we have been doing together on behalf of our members.

CMA has compiled the latest Australian Complementary Medicines Industry Snapshot 2018. This year’s snapshot was also translated into Chinese and made available to delegates at the Australian pavilion, Healthplex 2018 in Shanghai. Given the growing interest in the Australian complementary medicines industry from largely the Asia-Pacific region, we are now a $4.9 billion industry, and are still seeing healthy growth.

CMA hosted a number of successful events this year, including the CMA Innovation Seminar & Supplier Expo in April 2018 and October 2017, and the Annual Conference and Industry Awards on 25 & 26 October 2017. We hosted a Chinese delegation, led by the China Chamber of Commerce for Import & Export of Medicines & Health Products (CCCMHPIE), to our Conference and Industry Awards. These events reached another record number of participants this year. CMA also exhibited at the Naturally Good Expo in June 2018 as an event supporter.

CMA has launched the new industry initiative, Friends of Complementary Medicines (FoCM), in May 2018. FoCM has been created to build stronger networks between leading complementary medicines researchers, consumers and industry, and to proactively showcase the positives of our industry – safety, quality, responsibility, and research in traditional and scientific complementary medicines.

CMA has been a supporter of the Your Health Your Choice (YHYC) consumer campaign drawing public attention to issues impacting the natural medicines sector. This includes flawed government reviews of 17 natural therapies commissioned to justify the removal of the Private Health Insurance Rebate for natural therapies and other regulatory reforms. The campaign has now grown to around 95,000 signups and CMA continues to support YHYC as a platform that interfaces between government and consumers on issues relating to natural medicine.
International Profile:

CMA’s inaugural Australian Pavilion at Healthplex was a great success following over 6 month’s preparation with assistance by the CCCCCMHP. Due to popular demand for exhibition spaces for the Australian Pavilion, we have secured a bigger space for next year.

CMA was awarded grant funding from the Australian Department of Foreign Affairs and Trade (DFAT’s) Australia-China Council (ACC), to support our hosting of a Chinese delegation to visit Australia and attend our Annual Conference and Industry Awards on 26 October 2017. We are extremely fortunate to have been successful in securing funding, as one of only 34 successful recipients across a wide range of strategic priority areas for the ACC with 215 outstanding applications. Thanks to their generous support, we succeeded in building upon our industry’s growing relationship with our colleagues in China.

CMA represented the industry internationally, including the International Alliance of Dietary / Food Supplement Association (IADSA) Conference in London, Supply Side West in Las Vegas, and VITA FOODS ASIA in Singapore. CMA was invited and attended Nutraingredients-Asia Awards 2018 as an awards judging panelists.
Supporting Exports:

CMA representatives attended a meeting on international trade negotiations in October 2017, with peak organisations and the DFAT’s Trade Division, led by Deputy Secretary Justin Brown, gathered in Canberra. CMA had an excellent opportunity for networking with representatives from the DFAT Trade Division.

CMA developed a short survey for CMA exporters in February 2018. Feedback was used to assist with developing our work program related to export for 2018 and beyond. The survey highlighted that CMA exporters currently export complementary medicines all over the world. All respondents expect their export business to continue to grow over the next 3 years and currently export via E-commerce.

CMA welcomed representatives from the China Association for Quality Inspection (CAQI) to our office in January 2018. The CAQI learnt about the Australian complementary medicines industry as well as our high quality complementary medicines products regulated by the TGA. The meeting allowed for exploration of future engagement.

CMA maintained a strong relationship with Austrade. Austrade provided us with the latest export statistics for complementary medicines, and hosted a webinar session, which many of our members joined, to learn about E-commerce opportunities in health and beauty in Malaysia and an update on Malaysia’s Digital Free Trade Zone (DFTZ).

Proactive Media & Communications:

CMA has been increasingly active on our social media accounts, including LinkedIn, Facebook, and Twitter. CMA has also set up an official WeChat account, and has been publishing articles in Chinese with the aim to increase engagement with various Chinese stakeholders.

CMA has been contributing and publishing numerous articles through various media including Food-Navigator Asia and Pharmacy Daily. CMA has also published a number of media releases.

CMA developed a short survey for our members regarding membership communications earlier this year. The feedback was used to identify areas where we can improve our member communications, and to ensure that members are receiving the information they need to support their business.
CMA’s Inaugural Australian Pavilion at Healthplex 2018 Report
19-22 June 2018, Shanghai

CMA hosted the inaugural Australian Pavilion at Healthplex in Shanghai, organised with assistance by the China Chamber of Commerce for Import & Export of Medicines & Health Products (CCCMHPIE). CMA led seven leading Australian complementary medicines companies and over 110 delegates.

On the first day, the CMA delegation was invited to the Healthplex official opening as VIP guests.

CMA President Dusko Pejnovic was honoured to give a speech on behalf of all expo exhibitors, join in the ribbon cutting and also attend an ‘eye-dotting ceremony’.

Our Australian Pavilion was very popular with expo visitors for the entire three days, and delegates enjoyed a full schedule of meetings with various international stakeholders at the Pavilion. Our Pavilion looked balanced and united, and most importantly, was successful in demonstrating our ‘Brand Australia’—that is, emphasising that Australia manufactures complementary medicines to pharmaceuticals standards, supporting a global reputation for quality and safety, and making Australian products a sought after choice for health conscious-consumers.

As well as exhibiting, the CMA delegation also got the opportunity to attend a series of events, including the 5th Nutraceutical Industry Development Conference to learn the latest about regulations, cross-border E-commerce, WeChat social media, consumer trends, and the market environment in China. At the conference, CMA President Dusko Pejnovic made a presentation on the Australian regulatory system, which is respected around the world.

On the first evening of the Healthplex, the Australian and NZ delegates were hosted by the CCCMHPIE at a VIP networking dinner. Everyone had a great time enjoying food and drinks, and networking with Chinese stakeholders and Australian officials, including
Mr Graeme Meehan, Australian Consul General in Shanghai.

The first 2018 Nutrition & Health Industry Cross-border E-Commerce Industry Exchange Conference was also held on the second day. The idea of this conference was to meet the strong demand from overseas health product exhibitors to find cross-border e-commerce distribution channels in China. Each exhibitor had plenty of networking opportunities and made great contacts through this conference.

VIP Networking dinner, hosted by the CCCMHPIE

On the second day, the CCCMHPIE kindly organised a special event - “Australian Brand Show” for the Australian Pavilion exhibitors. Each exhibitor was given an opportunity to introduce their company and products to Chinese consumers on the stage.

2018 Nutrition & Health Industry Cross-border E-Commerce Industry Exchange Conference

The Australian Pavilion was a great success. CMA wishes to thank each Australian Pavilion exhibitor, Blackmores, Caruso’s Natural Health, Integria Healthcare, Lipa Pharmaceuticals, Pharmacare Laboratories, Sanofi Consumer Healthcare, and Swisse Wellness. Your participation made the Australian Pavilion possible. We would also like to say thank you to other members of the CMA delegation who joined our trip to Shanghai. We hope everyone had a productive and enjoyable week.

Finally, we would like to thank the CCCMHPIE for their incredible assistance on our very first Australian Pavilion and for hosting the wonderful networking dinner. CMA looks forward to welcoming a Chinese delegation led by the CCCMHPIE to CMA’s 19th Annual Conference and Industry Awards in September.
CMA Submissions

2018

• CMA Submission on 2018/19 Federal pre-Budget Submission (December 2017)
• CMA Submission on Interim Report - Review of Pharmacy Remuneration and Regulation (July 2018)
• CMA Submission on Risk-Aligned Models and Processes for the Proposed Listing Compliance Rating Framework (July 2018, targeted)
• CMA Submission on Publication of pre-Market Complementary Medicine Applications and Evaluation Outcomes (July 2018, targeted)
• CMA Submission on Best Practice Assessment for Homeopathic Product Regulation (July 2018, targeted)
• CMA Submission on the Content Limit for Arbutin containing Listed Medicines (June 2018, targeted)
• CMA Submission on Options for the Implementation of a Claimer for Efficacy Assessed Non-Prescription Medicines (May 2018)
• CMA Submission on Service Delivery Improvements for the TGA Manufacturing & Quality Branch (May 2018, targeted)
• CMA Submission on Adoption of the European Union Guidelines – Ethanol & Boron (May 2018)
• CMA Submission to the Country of Origin Labelling for Complementary Healthcare Products (January 2018, targeted).
• CMA Submission to the Senate Community Affairs Legislation Committee on the Therapeutic Goods Amendment (2017 Measures No.1) Bill 2017 (January 2018, targeted)

2017

• CMA Submission on 2018/19 Federal pre-Budget Submission (December 2017)
• CMA Submission on the Sunsetting of the Therapeutic Goods Regulations (December 2017, targeted)
• CMA Submission on Business Process Improvements Supporting Complementary Medicines Assessments Pathways (November 2017)
• CMA Submission on Regulatory Impacts to the Listed Medicine Category (November 2017, targeted)
• CMA Submission to Options for Retaining Products Making Substance-based Restricted Representations (folic acid, calcium, vitamin D) as Standard Listed Medicines (November 2017, targeted)
• CMA Submission on Preventing the Up-Regulation of Low-Risk and Pre-Approved Listed Medicine that Contribute to Reduced Disease Burden in the Australian Population (Calcium Folic Acid, Vitamin D) (October 2017, targeted)
• CMA Submission on Permitted Indications (1) - Health Maintenance Biomarker Claims (October 2017)
• CMA Submission on Permitted Indications (2) - Mild and Medically Diagnosed Conditions (October 2017)
• CMA Submission on Permitted Indications (3) - Maternal Health & Infancy (October 2017)
• CMA Submission on Permitted Indications (4) - Tradition of Use Evidence Qualifiers (October 2017)
• CMA Submission on Therapeutic Goods Advertising Code Proposed Improvements (13 October 2017)
• CMA Submission on Pharmacovigilance Inspection Guidelines (2 August 2017, targeted)
• CMA Submission on the new Risk-Based Approach to Medicine Variations -Registered CMs Part 2 (7 July 2017)
CMA ANNUAL CONFERENCE 2017 / INNOVATION SEMINAR & SUPPLIER EXPO

CMA would like to thank over 450 delegates who attended the 2017 Innovation Seminar & Supplier Expo, Annual Conference and 18th Annual Industry Awards. Your continued support has allowed us to not only establish the conference as a highlight of the complementary medicines industry calendar, but host an all new industry event in the Innovation Expo.

It was our pleasure to host the events this year at the iconic venue of Dockside. With its easy access to the Sydney CBD, and sparkling water views stretching across Darling Harbour, Dockside offers a superb venue that is ideally positioned and able to meet the needs of a large industry event such as ours. The events were hugely popular again this year, and exceeded our expectations with over 200 in attendance at the Innovation Expo, 250 at the Annual Conference and 400 at the Industry Awards.

This year, we were delighted to welcome a delegation from China, led by the China Chamber of Commerce for Import & Export of Medicines & Health Products (CCCMHPIE), with the aim of promoting greater engagement between our professional networks. CCCMHPIE has expressed their gratitude to CMA and our members for making the delegates feel welcome and for making their visit a great success. The delegation met with the CMA Board, attended the conference and awards dinner and enjoyed a number of site visits during a packed few days. The presentation by Mr. Zhang Zhongpeng exceeded all expectations, providing attendees with a comprehensive update on the market and regulations in China.

Innovation Seminar & Supplier Expo

The program focus for this inaugural event was The Next Big Thing. Delegates heard from 15 Australian and International speakers, who covered Innovation from all angles including ingredients, research, manufacturing and international innovations.

Annual Conference

The conference gets bigger and better each year, and this year’s event sponsored by Swisse Wellness was no exception as we expanded on the program theme The Science in the Story.

Dr Sue Read, Director of Life Unlimited Psychology was the Master of Ceremonies for the conference program of seven exceptional plenary speakers. Once again, we would like to express our heartfelt thanks to our speakers for sharing their time and expertise, and for making the conference an informative and engaging event.

Sponsors, Exhibitors and Prizes

CMA would like to extend our thanks and appreciation to all our sponsors, supporters and exhibitors at the events – in particular our major conference and industry awards sponsors, Swisse Wellness and DSM Nutritional Products.

Delegates were encouraged to get on social media with the promise of Google Home prize to the person with the most retweeted tweet using the hashtag #CMAConference.

We would also like to congratulate the winners of the CMA Passport Competition, and thank On Q Recruitment and Insurance Made Easy for providing additional prizes.
18TH ANNUAL INDUSTRY AWARDS

An excellent day of conferencing was again topped off with the Welcome Reception, kindly hosted by Aker BioMarine, and the Annual Industry Awards, which were proudly sponsored by DSM Nutritional products. The Awards evening is a fantastic opportunity to network with industry colleagues and celebrate the outstanding success of our greatest contributors. With panoramic views of Darling Harbour, Dockside is the perfect venue to host this event.

The awards are ever evolving, and in 2017 we saw the addition of the Innovator of the Year and Exporter of the Year award categories. As always, all categories were highly contested and we congratulate all the winners, in particular the winner of the Lady Cilento Award – Judy Jacka.

True to form, CMA CEO Carl Gibson appeared in yet another costume – this time a Sumo Wrestler, in response to his loss of the charity weight loss competition between himself and CMA Board President, Dusko Pejnovic. Combined, the two lost over 20kg and raised over $10,000 in donations.

It was our pleasure to host comedian Cal Wilson as the entertainment for the evening, who provided a hilarious comedy set to close the formal proceedings.

INDUSTRY AWARDS WINNERS 2017

The Lady Cilento Award for Lifetime Achievement
Judy Jacka

Wholesaler/Distributor of the Year
Complementary Medicines Group

The Vince Russell Retailer of the Year Award
Go Vita Springwood

Social Selling Award
Herbalife Nutrition

Exporter of the Year Award
Swisse Wellness

Innovator of the Year Award (Sponsored by Lipa)
Aker Biomarine

Quality Raw Material Supplier of the Year Award (Sponsored by Network Nutrition)
DSM Nutritional Products

High Quality Manufacturer of the Year Award (Sponsored by DSM Nutritional Products)
Lipa Pharmaceuticals

Most Outstanding Marketing Campaign (Sponsored by Foodsource)

Most Outstanding Contribution to Research, Education or Training
Integria Healthcare - Mediherb

Industry Contributor of the Year
Christine Holgate

The Judges Choice Award
The Australian Homeopathic Association for the Your Health - Your Choice Campaign
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