Euromonitor International

Where Consumers Shop for Consumer Health

March 2026

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Key findings
The role of online still scales, particularly in supplements, but also online pharmacies

STATE OF THE INDUSTRY

Consumer health demand shows moderate growth, with improving prospects over time
Demand patterns show in-home living has reduced spend priority, exempting essentials
Protein and drink formats stand out as drivers across many demand patterns
North American saturation has been a consistent drag on growth rates in global demand
Sports nutrition dominates growth, but note the realignment of both China and India
E-commerce gains are not uniform, specific categories and countries are driving this

OFFLINE RETAIL

Pharmacies remain the dominant channel offline, but headwinds continue to mount
Pharmacies enjoyed majority of sales value gains across a fragmented channel
The competition facing non-grocery retail is more e-commerce than rival grocery players
Pharmacy sales have returned to a lower growth profile than total consumer health
Grocery expanded and improved the health offering, but online convenience is winning
Expansion of beyond-prescription clinical services in retail, aiming for community care
Private label is growing in multiple regions, whilst increased ranges in the US also evident

RETAIL E-COMMERCE

There are strong gains still in e-commerce, even if slower than the heights of 2020-2021
Quarterly view shows Q4 is typically peak from infection season, but not in 2025
Brazil, Mexico, US, Poland and South Korea deliver largest sales value gains by 2025
Bulk of e-commerce gains lie in combination and single ingredient herbal supplements
Marketplace and direct online now accounts for over 80% of tracked e-commerce sales
Amazon leads cash growth, while TikTok and CGC prove what social validation can bring
AI personalisation is taking off across beauty, health and nutrition (including pet care)
Digital ecosystems and retail media: Turning shopping apps into advertising channels
Social commerce/validation moves the needle on growth rates (and cost per consumer)

CONCLUSION

AI will initially be a mild headache, but eventually open the door to personalised health
Recommendations for how to win, and how we can help you take the next step

APPENDIX

Euromonitor Passport E-Commerce: Coverage and methodology

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.

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For more information on this report, further enquiries can be directed via this link www.euromonitor.com/where-consumers-shop-for-consumer-health/report.