



Euromonitor
International

Where Consumers Shop for Consumer Health

July 2025

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Key findings

WHERE CONSUMERS SHOP FOR CONSUMER HEALTH

E-commerce co-exists in harmony with offline retail to provide consumers more choices

STATE OF THE INDUSTRY

Global consumer trends impacted by macroeconomic pressures such as inflation

OTC sees soft growth in 2024; vitamins and dietary supplements look to newer markets

Sports nutrition surges, vitamins and dietary supplements strong in emerging markets

Asia Pacific and North America off in 2024, other regions return to healthy growth

Retail e-commerce gains market share while offline continues to lead

OFFLINE RETAIL

Offline retailers continue to enjoy strong foothold within consumer health

Pharmacies to dominate followed by hypermarkets with innovative retail concepts

Non-grocery retailers lead within consumer health due to popularity of pharmacies

Pharmacies continue to innovate their offerings to maintain strong foothold in medicine

Grocery retailers increasing footprint of health and wellness products in their stores

Canada's Shoppers Drug Mart pharmacy engages younger audiences through TikTok

Chemist Warehouse merges with Sigma Healthcare to strengthen its position in competitive market

RETAIL E-COMMERCE

The digital shift in consumer health: E-commerce trend impact across categories

E-commerce driven by health and wellness awareness and digital adoption

North America, Latin America and Asia regions dominate within e-commerce retail

VDS and sports nutrition most dominant within e-commerce

Marketplaces and health specialist e-stores dominate consumer health e-commerce

Largest and most dynamic e-commerce retailers

Global leaders in e-commerce fall across various business models

Amazon pharmacy redefines shopping for consumer health products online

Aster Pharmacy's myAster Mobile App rises in popularity with over 1 million downloads

CONCLUSION

Evolution of distribution within retailing in consumer health

Recommendations/How to win

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.

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/where-consumers-shop-for-consumer-health/report.