



Consumer Health in the US

September 2025

Table of Contents

Consumer Health in the US

EXECUTIVE SUMMARY

Consumer Health in 2025: The big picture

Key trends in 2025

Competitive landscape

Channel developments

What next for Consumer Health?

MARKET INDICATORS

Table 1 - Consumer Expenditure on Health Goods and Medical Services: Value 2020-2025

Table 2 - Life Expectancy at Birth 2020-2025

MARKET DATA

Table 3 - Sales of Consumer Health by Category: Value 2020-2025

Table 4 - Sales of Consumer Health by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Consumer Health: % Value 2021-2025

Table 6 - LBN Brand Shares of Consumer Health: % Value 2022-2025

Table 7 - Penetration of Private Label in Consumer Health by Category: % Value 2020-2025

Table 8 - Distribution of Consumer Health by Format: % Value 2020-2025

Table 9 - Distribution of Consumer Health by Format and Category: % Value 2025

Table 10 - Forecast Sales of Consumer Health by Category: Value 2025-2030

Table 11 - Forecast Sales of Consumer Health by Category: % Value Growth 2025-2030

APPENDIX

OTC registration and classification

Vitamins and dietary supplements registration and classification

Self-medication/self-care and preventive medicine

Switches

DISCLAIMER

DEFINITIONS

SOURCES

Summary 1 - Research Sources

Analgesics in the US

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sales of analgesics remain stable in 2025 but the category faces challenges

Product innovation and targeted marketing create value growth

Pharmacies leads sales but lose share to other channels

PROSPECTS AND OPPORTUNITIES

Market maturity could force players to explore new opportunities

Digital technologies and wellness partnerships present opportunities

ACNU rule creates a new class of OTC drug

CATEGORY DATA

Table 12 - Sales of Analgesics by Category: Value 2020-2025

Table 13 - Sales of Analgesics by Category: % Value Growth 2020-2025

Table 14 - NBO Company Shares of Analgesics: % Value 2021-2025

Table 15 - LBN Brand Shares of Analgesics: % Value 2022-2025

Table 16 - Forecast Sales of Analgesics by Category: Value 2025-2030

Table 17 - Forecast Sales of Analgesics by Category: % Value Growth 2025-2030

Sleep Aids in the US

KEY DATA FINDINGS

2025 DEVELOPMENTS

Holistic wellness overtakes oral medications in promoting better sleep

Players experiment with new drug-free formats to encourage engagement

E-commerce wins share while OLLY and Nature Made Sleep see healthy growth

PROSPECTS AND OPPORTUNITIES

Research into women's health provides compelling future prospects for sleep aids

Shortages of botanical ingredients could push consumers to alternative solutions

Sleep aids facing an uncertain future as consumers explore new solutions to healthy sleep

CATEGORY DATA

Table 18 - Sales of Sleep Aids: Value 2020-2025

Table 19 - Sales of Sleep Aids: % Value Growth 2020-2025

Table 20 - NBO Company Shares of Sleep Aids: % Value 2021-2025

Table 21 - LBN Brand Shares of Sleep Aids: % Value 2022-2025

Table 22 - Forecast Sales of Sleep Aids: Value 2025-2030

Table 23 - Forecast Sales of Sleep Aids: % Value Growth 2025-2030

Cough, Cold and Allergy (Hay Fever) Remedies in the US

KEY DATA FINDINGS

2025 DEVELOPMENTS

FDA proposes ending the use of oral phenylephrine in nasal decongestants

Brands and private label go head to head

E-commerce, supermarkets and hypermarkets take share from pharmacies

PROSPECTS AND OPPORTUNITIES

Vaccinations under threat following the appointment of Robert F. Kennedy Jr

Search technology evolving toward conversation and a human-like interface

Innovation in sustainable packaging will acquire more momentum

CATEGORY DATA

Table 24 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2020-2025

Table 25 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2020-2025

Table 26 - NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2021-2025

Table 27 - LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2022-2025

Table 28 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2025-2030

Table 29 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2025-2030

Dermatologicals in the US

KEY DATA FINDINGS

2025 DEVELOPMENTS

Dermatologicals sees modest growth with hair and scalp health a focus of sales

Topical ointments facing stiff competition from alternative product formats

Hair loss treatments a key focus of innovation as demand rises

PROSPECTS AND OPPORTUNITIES

Consumer health and beauty products hold crossover potential

AI helping to streamline and personalise skin diagnoses and treatment

Pregnancy-safe dermatologicals positioned for growth

CATEGORY DATA

Table 30 - Sales of Dermatologicals by Category: Value 2020-2025

Table 31 - Sales of Dermatologicals by Category: % Value Growth 2020-2025

Table 32 - NBO Company Shares of Dermatologicals: % Value 2021-2025

Table 33 - LBN Brand Shares of Dermatologicals: % Value 2022-2025

Table 34 - LBN Brand Shares of Hair Loss Treatments: % Value 2022-2025

Table 35 - Forecast Sales of Dermatologicals by Category: Value 2025-2030

Table 36 - Forecast Sales of Dermatologicals by Category: % Value Growth 2025-2030

Digestive Remedies in the US

KEY DATA FINDINGS

2025 DEVELOPMENTS

Digestive remedies sees steady growth in 2025 backed by new innovations

Market expands thanks to investment in new innovations

Strength of hypermarket channel highlights fluidity of online to offline for consumers

PROSPECTS AND OPPORTUNITIES

Digestive remedies could be challenged by non-drug options over the forecast period

New technology and digital apps promise opportunities for partnership

The ACNU Final Rule may have implications for digestive remedies

CATEGORY DATA

Table 37 - Sales of Digestive Remedies by Category: Value 2020-2025

Table 38 - Sales of Digestive Remedies by Category: % Value Growth 2020-2025

Table 39 - NBO Company Shares of Digestive Remedies: % Value 2021-2025

Table 40 - LBN Brand Shares of Digestive Remedies: % Value 2022-2025

Table 41 - Forecast Sales of Digestive Remedies by Category: Value 2025-2030

Table 42 - Forecast Sales of Digestive Remedies by Category: % Value Growth 2025-2030

Eye Care in the US

KEY DATA FINDINGS

2025 DEVELOPMENTS

Consumers place their trust in branded products in 2025

Innovation and patent protection sustains competition in eye care

E-commerce thriving as consumers look for convenience and cost savings

PROSPECTS AND OPPORTUNITIES

Eye care is well positioned for growth over the forecast period

Innovation in eye care delivery systems set to drive brand differentiation

Eye wellness directs the conversation to everyday habits and the association of eye health with beauty

CATEGORY DATA

Table 43 - Sales of Eye Care by Category: Value 2020-2025

Table 44 - Sales of Eye Care by Category: % Value Growth 2020-2025

Table 45 - NBO Company Shares of Eye Care: % Value 2021-2025

Table 46 - LBN Brand Shares of Eye Care: % Value 2022-2025

Table 47 - Forecast Sales of Eye Care by Category: Value 2025-2030

Table 48 - Forecast Sales of Eye Care by Category: % Value Growth 2025-2030

NRT Smoking Cessation Aids in the US

KEY DATA FINDINGS

2025 DEVELOPMENTS

Value sales of NRT smoking cessation aids set to decline in 2025

Jones finds success by coupling fresh marketing with therapy

E-commerce on the rise as consumers seek convenience and discretion

PROSPECTS AND OPPORTUNITIES

Modern oral nicotine products may impact demand for NRT smoking cessation aids

New prescription NRTs could impact the future of OTC products

FDA seeks to reduce nicotine content in tobacco products

CATEGORY INDICATORS

Table 49 - Number of Smokers by Gender 2020-2025

CATEGORY DATA

Table 50 - Sales of NRT Smoking Cessation Aids by Category: Value 2020-2025

Table 51 - Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2020-2025

Table 52 - NBO Company Shares of NRT Smoking Cessation Aids: % Value 2021-2025

Table 53 - LBN Brand Shares of NRT Smoking Cessation Aids: % Value 2022-2025

Table 54 - Forecast Sales of NRT Smoking Cessation Aids by Category: Value 2025-2030

Table 55 - Forecast Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2025-2030

Wound Care in the US

KEY DATA FINDINGS

2025 DEVELOPMENTS

Wound care sees modest growth amid market maturity and limited innovation

Kenvue leads US Wound Care market with Innovation and brand strength

E-commerce making gains in wound care

PROSPECTS AND OPPORTUNITIES

Active lifestyles and eco-consciousness set to shape the future of wound care

Innovation gaps and emerging technologies in wound care

Smart bandages: the future of chronic wound management

CATEGORY DATA

Table 56 - Sales of Wound Care by Category: Value 2020-2025

Table 57 - Sales of Wound Care by Category: % Value Growth 2020-2025

Table 58 - NBO Company Shares of Wound Care: % Value 2021-2025

Table 59 - LBN Brand Shares of Wound Care: % Value 2022-2025

Table 60 - Forecast Sales of Wound Care by Category: Value 2025-2030

Table 61 - Forecast Sales of Wound Care by Category: % Value Growth 2025-2030

Sports Nutrition in the US

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sports nutrition remains a dynamic area of consumer health in 2025

Glanbia maintains leadership in a competitive US sports nutrition market

E-commerce leads distribution in 2025

PROSPECTS AND OPPORTUNITIES

Evolving trends and product innovation to boost the market

Increased personalisation set to be a feature of sports nutrition.

Blurring boundaries: the integration of wellness, indulgence, and performance nutrition

CATEGORY DATA

Table 62 - Sales of Sports Nutrition by Category: Value 2020-2025

Table 63 - Sales of Sports Nutrition by Category: % Value Growth 2020-2025

Table 64 - NBO Company Shares of Sports Nutrition: % Value 2021-2025

Table 65 - LBN Brand Shares of Sports Nutrition: % Value 2022-2025

Table 66 - Forecast Sales of Sports Nutrition by Category: Value 2025-2030

Table 67 - Forecast Sales of Sports Nutrition by Category: % Value Growth 2025-2030

Dietary Supplements in the US

KEY DATA FINDINGS

2025 DEVELOPMENTS

The wellness boom reshaping the US dietary supplements market

Competition heats up in a fragmented landscape

E-commerce and social media leads the dietary supplements revolution

PROSPECTS AND OPPORTUNITIES

Dietary supplements set for strong growth, with an increasing focus on personalisation and multifunctionality

Beauty and gut health dietary supplements to redefine the wellness landscape

Ageing population looking for support in leading longer and healthier lives

CATEGORY DATA

Table 68 - Sales of Dietary Supplements by Category: Value 2020-2025

Table 69 - Sales of Dietary Supplements by Category: % Value Growth 2020-2025

Table 70 - Sales of Dietary Supplements by Positioning: % Value 2020-2025

Table 71 - NBO Company Shares of Dietary Supplements: % Value 2021-2025

Table 72 - LBN Brand Shares of Dietary Supplements: % Value 2022-2025

Table 73 - Forecast Sales of Dietary Supplements by Category: Value 2025-2030

Table 74 - Forecast Sales of Dietary Supplements by Category: % Value Growth 2025-2030

Vitamins in the US

KEY DATA FINDINGS

2025 DEVELOPMENTS

Value sales of vitamins rise in 2025 amid a growing focus on preventative health

Nature Made remains on top but private label benefits from innovation to win share

E-commerce extends its leading position in vitamins

PROSPECTS AND OPPORTUNITIES

Positive outlook for vitamins driven by holistic health trends and innovation

Functional wellness products pose growing competition to vitamins

Personalised solutions: the next frontier in the US vitamins market

CATEGORY DATA

Table 75 - Sales of Vitamins by Category: Value 2020-2025

Table 76 - Sales of Vitamins by Category: % Value Growth 2020-2025

Table 77 - Sales of Multivitamins by Positioning: % Value 2020-2025

Table 78 - NBO Company Shares of Vitamins: % Value 2021-2025

Table 79 - LBN Brand Shares of Vitamins: % Value 2022-2025

Table 80 - Forecast Sales of Vitamins by Category: Value 2025-2030

Table 81 - Forecast Sales of Vitamins by Category: % Value Growth 2025-2030

Weight Management and Wellbeing in the US

KEY DATA FINDINGS

2025 DEVELOPMENTS

Prescription weight loss medications take a bite out of the market

Supplement nutrition drinks with added protein driving growth

Legacy diet brands shift focus offering nutrient-dense healthy meals and weight management prescriptions

PROSPECTS AND OPPORTUNITIES

Expanding access to GLP-1 medications will transform weight loss over the forecast period

Opportunity for new products which complement and support GLP-1 users

GLP-1 medications set to present challenges and opportunities

CATEGORY DATA

Table 82 - Sales of Weight Management and Wellbeing by Category: Value 2020-2025

Table 83 - Sales of Weight Management and Wellbeing by Category: % Value Growth 2020-2025

Table 84 - NBO Company Shares of Weight Management and Wellbeing: % Value 2021-2025

Table 85 - LBN Brand Shares of Weight Management and Wellbeing: % Value 2022-2025

Table 86 - Forecast Sales of Weight Management and Wellbeing by Category: Value 2025-2030

Table 87 - Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2025-2030

Herbal/Traditional Products in the US

KEY DATA FINDINGS

2025 DEVELOPMENTS

Demand for clean-label drugs on the rise with legislation prompting a national health movement

Weight loss supplements and functional beverages formulated with botanicals fuelling growth

E-commerce enables niche brands to reach more consumers

PROSPECTS AND OPPORTUNITIES

Tariffs could impact prices

Herbal/traditional dietary supplements: a growing ally to the US' ageing population

Growing safety concerns could impact growth momentum

CATEGORY DATA

Table 88 - Sales of Herbal/Traditional Products by Category: Value 2020-2025

Table 89 - Sales of Herbal/Traditional Products by Category: % Value Growth 2020-2025

Table 90 - NBO Company Shares of Herbal/Traditional Products: % Value 2021-2025

Table 91 - LBN Brand Shares of Herbal/Traditional Products: % Value 2022-2025

Table 92 - Forecast Sales of Herbal/Traditional Products by Category: Value 2025-2030

Table 93 - Forecast Sales of Herbal/Traditional Products by Category: % Value Growth 2025-2030

Paediatric Consumer Health in the US

KEY DATA FINDINGS

2025 DEVELOPMENTS

Paediatric consumer health focuses on clean and drug-free formulations

Brand-driven success in paediatric health and wellness

Social media triggering health concerns as more consumers shift online

PROSPECTS AND OPPORTUNITIES

Focus set to fall on clean labels and non-drug formulations

Nurturing wellness: the rise of natural paediatric vitamins and dietary supplements

State-led regulatory changes and GLP-1 approval for adolescents on the horizon

CATEGORY DATA

Table 94 - Sales of Paediatric Consumer Health by Category: Value 2020-2025

Table 95 - Sales of Paediatric Consumer Health by Category: % Value Growth 2020-2025

Table 96 - NBO Company Shares of Paediatric Consumer Health: % Value 2021-2025

Table 97 - LBN Brand Shares of Paediatric Consumer Health: % Value 2022-2025

Table 98 - Forecast Sales of Paediatric Consumer Health by Category: Value 2025-2030

Table 99 - Forecast Sales of Paediatric Consumer Health by Category: % Value Growth 2025-2030

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/consumer-health-in-the-us/report.