



The State of Marketplaces in FMCG E-Commerce in 2026

July 2026

EXECUTIVE SUMMARY

Why read this report?

Key findings

INTRODUCTION

Marketplaces have evolved as a core infrastructure underpinning FMCG e-commerce...

...but growth is becoming more channel-specific

GROWING CHALLENGES FOR MARKETPLACES

Not one size fits all - the problem of category-channel fit

Where is growth shifting?

MARKETPLACE PERFORMANCE ACROSS FMCG INDUSTRIES

Marketplaces remain the anchor channel for beauty products, despite DTC growth

Growth is driven by a balanced mix of mass and premium brands across key categories

Estée Lauder's DTC push reinforces, rather than replaces, marketplace-led scale

Marketplaces lead online consumer health sales, even as local channel structures vary

Quality-led brands outperform on consumer health marketplaces

Sports protein brands win on marketplaces by being discoverable and comparable

Marketplaces win in pet care on convenience and assortment amid a dual-channel split

Pet parents shop for specialised solutions and replenishments on marketplaces

Premium pet food brands rely on specialists, but marketplace growth is accelerating

Tissue and hygiene remains marketplace-led, supported by frequent and bulk buying

Marketplace growth in tissue and hygiene is broadening beyond baby care

Baby hygiene is marketplace-ready, but channel leadership remains market-specific

Bulk packs, subscriptions and price comparison sustain marketplace lead in home care

Innovation-led formats drive home care growth on marketplaces

Tide relies on marketplaces to widen its reach and distribution for global leadership

MARKETPLACE PERFORMANCE ACROSS FMCG CATEGORIES

Grocery strengthens its lead in snacks e-commerce as marketplace share moderates

Snack marketplace growth shifts towards indulgence, gifting and established brands

Amazon turns Lindt's premium chocolate appeal into scalable online growth

Dairy products and alternatives remain less penetrated on marketplaces

MARKETPLACE PERFORMANCE ACROSS FMCG CATEGORIES

Despite limitations, opportunities exist: with successes to learn from in China

Adopt A Cow's Tmall triumph proves dairy brands can thrive online

UNVEILING THE MARKETPLACE CHAMPIONS

While Amazon leads globally, Douyin and TikTok Shop redefine FMCG e-commerce

Marketplaces developing quick-commerce to move to everyday replenishment

FROM LARGEST SOURCE OF DISCOVERY TO LARGEST BRAND DESTINATION

Marketplaces are becoming the product recommendation engine for AI-led commerce

Amazon has the strongest position, but also most exposed to external agent disruption

CONCLUSION

Recommendations and opportunities for growth

Evolution of FMCG e-commerce on marketplaces

Questions we are asking

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/the-state-of-marketplaces-in-fmcg-e-commerce-in-2026/report.