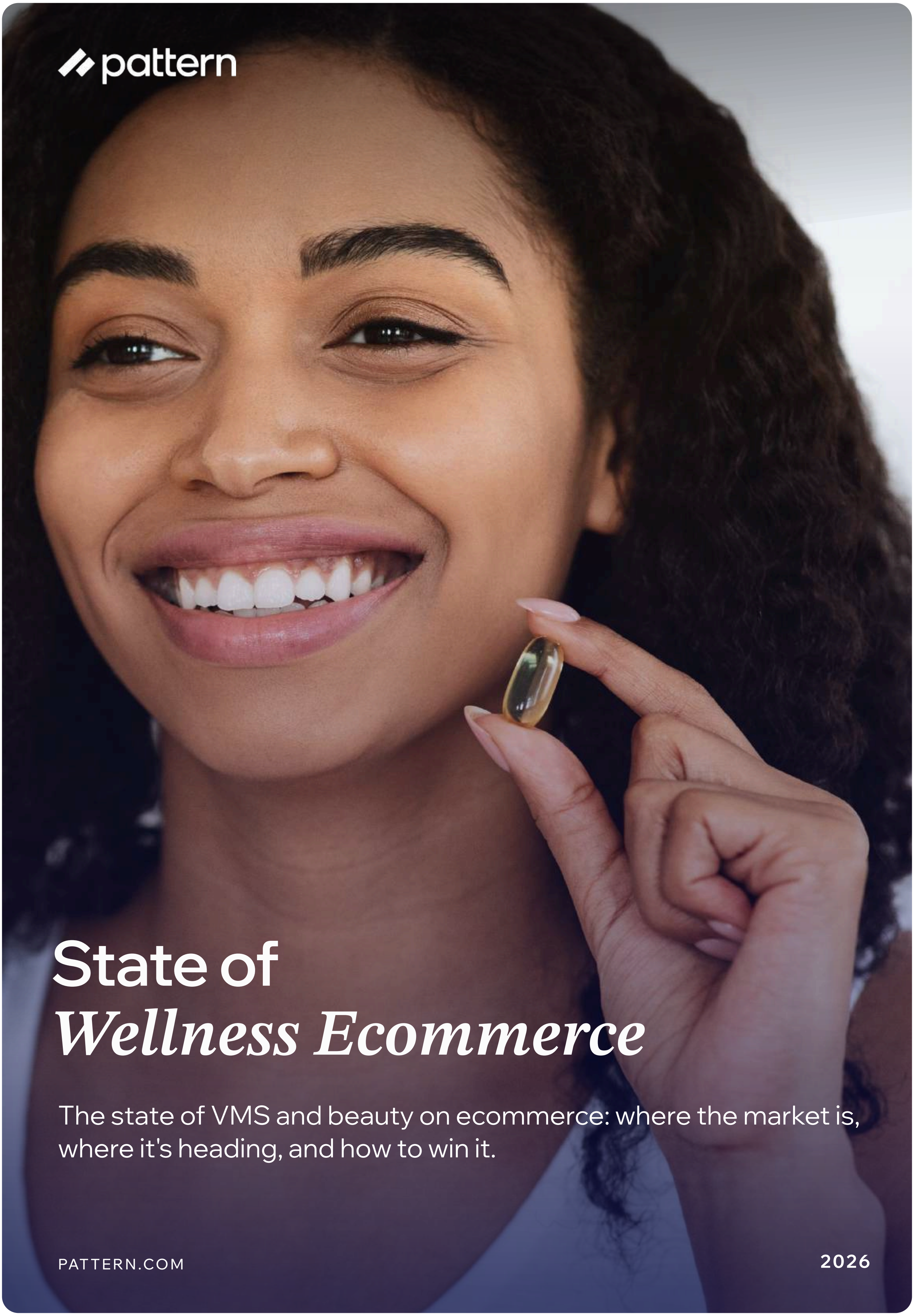


pattern

State of *Wellness Ecommerce*

The state of VMS and beauty on ecommerce: where the market is, where it's heading, and how to win it.

What's *inside*

SECTION 01

Executive *Summary*

The wellness ecommerce opportunity is real, it's growing, and it's now. Across the UK, Europe, and MENA, the wellness and supplements market is growing consistently and ecommerce is its fastest-moving channel. Online channels are growing at more than twice the rate of offline retail.[1] Consumer demand is durable, not cyclical. Section 2 sets out the full picture by market.

And yet, for many VMS and beauty brands, the gap between the opportunity on paper and the growth they're actually achieving is wider than it should be. The market is moving. The consumer appetite is there. But something is getting in the way.

Usually, it's one of four things: a loss of brand control that's quietly undermining everything else, margin pressure that makes growth feel unsustainable, a channel strategy that's fragmented across too many directions at once, or the complexity of international expansion that makes new markets feel more risky than rewarding.

This report addresses all four. It starts by making the case for the opportunity. It then introduces a simple framework for diagnosing where the real friction is. And it works through each barrier in detail: what causes it, what the strategic response looks like, and what the data shows when it's solved.

Brands that solve for control, profitability, channel strategy, and international readiness don't just survive the complexity of ecommerce. They compound. And the compounding effect, once it starts, is very difficult for competitors to disrupt.

The wellness market is ready. The question is whether your brand is set up to capture it.

SECTION 02

The wellness ecommerce *opportunity.*

Let's start with what's actually in front of you. The global beauty and wellness products market was valued at approximately £491 billion in 2025 and is forecast to reach close to £713 billion by 2030, growing at a CAGR of 7.5%.[1]

Within that, the wellness products segment is expected to grow at the highest rate, at a CAGR of 11% per annum, significantly outpacing the broader market.[3]

UK

In the UK, the dietary supplements market was estimated at £3.59 billion in 2024 and is forecast to reach £7.24 billion by 2033, a CAGR of 8.1%.[2] The UK is projected to be the fastest-growing dietary supplements market in Europe over the same period, underpinned by a maturing ecommerce infrastructure, strong subscription adoption, and rising consumer demand for personalised, science-backed nutrition.

EUROPE

Across Europe, the nutrition and supplements market was estimated at £65bn in 2024 and is forecast to reach £93bn by 2030, a CAGR of 6.1%.[8] Ecommerce is the fastest-growing distribution channel across the region, driven by convenience, wider product availability, and the rise of subscription models.

MENA

In MENA, the dietary supplements market is growing at a CAGR of 10.2%, one of the fastest rates globally, reaching an estimated £2.43 billion in 2025 and projected to hit £3.32 billion by 2030.[9] A young, digitally native population, rising health consciousness, and rapidly expanding ecommerce infrastructure are the primary drivers. The UAE recorded a 40% increase in supplement sales between 2021 and 2023 alone.[10]

£491bn

Global beauty and wellness market value, 2025[1]

11%

Annual growth forecast for online wellness channels[3]

10.2%

CAGR for MENA dietary supplements — one of the fastest rates globally[9]

79%

of UK consumers rate wellness as a top life priority[4]

What's driving it

This isn't a numbers story alone. Behind the data are real, durable shifts in consumer behaviour reshaping the category for the long term.

Post-pandemic mindset

Covid-19 permanently elevated how consumers think about their health. Demand for immunity, gut health, and mental wellbeing products surged and never fully receded. **56%** of consumers now say they're prioritising wellness more than they did a year ago.[4]

Social commerce

TikTok and Instagram have become primary discovery channels for wellness products. **UK consumer interaction with supplement brands on TikTok grew from 22% in 2023 to 33% in 2024.**[5] Platform-native buying is a genuine growth engine for brands set up to capture it.

Science-led positioning & personalisation

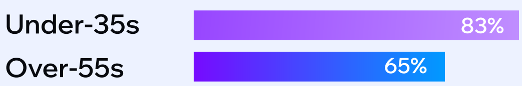
Consumers are increasingly willing to pay more for products that are transparently formulated, clinically evidenced, and tailored to their specific needs. Brands that can credibly claim this positioning command both higher prices and stronger loyalty.

Male wellness

Men's wellness and grooming is one of the fastest-growing sub-segments in the category. Cultural norms around self-care are shifting, and early movers report above-average growth with below-average competitive intensity.

Younger demographics

Current use of VMS products in the UK[6]



The trend holds across Europe and MENA, where younger consumers are the primary growth demographic for the category. Across markets, this cohort increasingly views wellness not as a functional purchase but as a lifestyle identity: a majority of Gen Z consumers say they prioritise a healthy lifestyle over traditional markers of success.[11] They discover through social, buy through marketplaces, and expect brands to meet them on both.

Why ecommerce is the battleground

Marketplaces, led by Amazon, dominate online wellness retail across Europe and the UK. Amazon remains the dominant platform for VMS by a significant margin. In MENA, the picture is more diversified: Amazon UAE competes alongside Noon, Namshi, and other regional platforms, which collectively command a substantial share of wellness ecommerce traffic. Brands entering MENA without a multi-platform strategy are leaving significant reach on the table.

That makes ecommerce impossible to ignore. But it also makes it genuinely demanding to get right. The same openness that gives brands access to millions of shoppers also exposes them to content fragmentation, brand erosion, and commercial complexity if the right foundations aren't in place.

Being present on a marketplace and having a managed marketplace strategy are two very different things. The rest of this report is about understanding the difference.

SECTION 03

Why growth is *harder than it looks.*

The wellness ecommerce market is growing. Consumer intent is high. Search volumes are enormous. And yet a consistent pattern emerges when you look at the brands operating in this space: the gap between the opportunity and the growth they're actually capturing is wider than it should be.

That gap usually comes from one or more of four places.

1. Brand Control
2. Profitability and growth
3. Channel conflict and lack of resources
4. Internationalisation

BARRIER 1

Brand control

For many wellness brands, ecommerce is a place where their brand exists rather than a place they actively manage. Unauthorised third-party sellers list products, often with incorrect content and without the service quality that reflects a premium brand. Buy Box ownership becomes fractured. The result is a brand that's technically present on the marketplace but commercially undermined by it. And because Buy Box fragmentation directly suppresses advertising efficiency, the more a brand spends trying to grow, the more it compounds the problem.

BARRIER 2

Profitability and growth

The economics of ecommerce can be deceptive. Revenue growth looks good on a dashboard but can hide significant margin erosion underneath. For brands operating under a first-party (1P) wholesale model with Amazon, commercial visibility is poor and control over how products are positioned and sold is limited. The transition to a third-party (3P) model, which restores control and improves margin potential, is the right move for most established wellness brands. But it carries real execution risk if the transition isn't managed carefully.

BARRIER 3

Channel conflict and lack of resources

Growing a wellness brand on ecommerce requires a broad range of capabilities: marketplace expertise, content production, advertising technology, compliance knowledge, and inventory management, to name a few. When activity is fragmented across multiple sellers, distributors, or internal teams with different objectives, the result is inconsistent content and brand equity that erodes quietly in all directions. And the resource problem compounds during the moments it matters most: a rebrand, a product launch, a rapid scale-up.

BARRIER 4

Internationalisation

New markets represent some of the most compelling growth opportunities available to wellness brands right now. MENA is growing rapidly. Asia-Pacific is forecast to become the fastest-growing wellness region globally. But international ecommerce is operationally demanding. Regulatory requirements vary. Consumer behaviour and platform preferences differ. Grey-market sellers can establish a foothold before the brand has even officially arrived.

SECTION 04

The growth equation: *a diagnostic framework*

Before addressing what's holding a brand back, it helps to have a clear framework for seeing where the problem actually sits. Ecommerce performance can be mapped to four fundamental variables.

Revenue = Traffic × Conversion × Price × Availability

Every challenge, and every opportunity, in ecommerce traces back to one or more of these. Here's how each one shows up specifically in the wellness category.

Traffic

Traffic is about being found. That means ranking on the right keywords, running advertising that drives genuinely incremental revenue rather than cannibalising organic sales, and building a content and brand presence compelling enough to turn search intent into a click.

In the wellness category, search volumes are enormous and competition is fierce. A brand without a disciplined traffic strategy isn't just underperforming. It's invisible to the shoppers it needs most. The traffic lever is also the one most directly affected by brand control: a fragmented Buy Box means advertising spend is partially driving sales to competitors.

Conversion

Conversion is about being chosen. When a shopper lands on a listing, everything matters: imagery, A+ content, ratings, reviews, and delivery signals. A listing that doesn't convert is wasting budget spent to drive traffic to it.

In wellness, where purchase decisions involve a degree of trust, content quality and social proof are consistently among the most underinvested conversion levers. A product with strong clinical credentials but poor listing content will lose to a weaker product with better presentation every time.

Price

Price is about being competitive without being destructive. In a category saturated with resellers and grey-market stock, pricing consistency is genuinely hard to maintain. But for premium wellness brands, it's a key commercial priority.

Inconsistent pricing across channels can undermine brand equity, confuses consumers, and signals a brand that's lost control of its own distribution. The dynamic pricing tools available today make pricing consistency achievable without sacrificing Buy Box competitiveness, but they require deliberate deployment.

Availability

Availability is about being there when it matters. Out-of-stocks are costly in any category. In subscription-driven wellness, where customers expect reliable delivery on schedule, they're brand-damaging in a way that's difficult to recover from.

High in-stock rates and lean, responsive inventory management are the operational baseline that everything else is built on. Brands that treat availability as an afterthought will find their traffic, conversion, and price work consistently undermined.

Using the framework

The value of this framework isn't just diagnostic. It's prioritisation. Most brands have limited resources and can't fix everything at once. For most wellness brands, the answer is to start with brand control, because Buy Box fragmentation suppresses the effectiveness of every other lever simultaneously. Fix control, and traffic investment starts working. Fix control, and conversion optimisation compounds. Fix control, and Buy Box stability becomes achievable.

SECTION 05

Solving the *four barriers*

The following sections address each barrier in detail: what causes it, what an effective strategic response looks like, and what the data shows when it's solved. Each section closes with a compact proof point drawn from real brand experience.

BARRIER 1

Brand control

What's actually happening

Brand control problems on ecommerce almost always follow the same escalation pattern. It starts innocuously, then compounds quickly.

- A brand launches on Amazon and picks up a handful of third-party resellers. Initially, this seems manageable.
- Those resellers compete on price to win the Buy Box, which erodes margin and undermines the brand's positioning.
- Resellers start winning the Buy Box itself, which means the brand's own advertising is now partially driving sales to competitors.
- Listings appear with incorrect or outdated content, weakening the brand experience for every shopper who encounters them.
- By the time the brand acts, unauthorised sellers have established deep roots. Delisting them is legally and operationally complex. And expensive.

The result is a brand that's technically present on the marketplace but commercially undermined by it. And because Buy Box fragmentation directly suppresses advertising efficiency, the more a brand spends trying to grow, the worse the problem compounds.

Why it matters more than it looks

The Buy Box is the single most important real estate on any Amazon product listing. Whoever holds it wins the sale. If a brand doesn't consistently hold its own Buy Box, its advertising campaigns, organic ranking work, and content investment are all, at least partially, driving revenue to someone else.

Buy Box ownership also affects organic ranking. Amazon's algorithm rewards sellers that convert consistently. A fractured Buy Box means inconsistent conversion, which means weaker organic positioning, which means less visibility, which means lower traffic. The compounding effect runs in both directions.

The strategic response

Restoring brand control requires three things working in tandem:

Legal enforcement:
Tracking and addressing unauthorised sellers through Vorys, a specialist third-party law firm included in the Pattern model at no extra cost. Vorys uses Pattern's technology to identify rogue sellers and advises and assists the brand with enforcement. Brands that treat this as a one-off exercise rather than an ongoing programme tend to find sellers re-emerging over time.

Pricing technology:
Deploying dynamic repricing tools that maintain competitive Buy Box positioning without sacrificing margin. Pattern maintains sole and absolute control over setting product prices on retail platforms on which it sells, and adjusts prices at its sole discretion.

Operational discipline:
Establishing clear operational standards and maintaining them consistently. Brand control isn't a crisis response, it's an ongoing business function.

IN PRACTICE: Thorne UK

Amazon UK | 22 SKUs | Vitamins and Supplements

49% to 91%
Buy Box ownership restored in 10 months

195%
Year-on-year revenue uplift following stabilisation

6.5x
True ROAS once advertising deployed on a clean platform

22
New SKUs launched compliantly within year one

Thorne's results demonstrate the sequence clearly. Buy Box control was restored first, then advertising was scaled. The 195% revenue uplift wasn't driven by spending more. It was driven by fixing the platform the spending was running on.

BARRIER 2

Profitability and the 1P to 3P transition

What's actually happening

Many established wellness brands entered ecommerce through a first-party (1P) wholesale relationship with Amazon. It's the path of least resistance: sell inventory wholesale, let Amazon retail it, collect the revenue. But the economics erode over time.

Under a 1P model, a brand effectively hands over commercial control. In practice, that means:

- Amazon sets the retail price, with limited recourse for the brand when it doesn't reflect premium positioning.
- Promotional and advertising costs are shared in ways that often aren't fully transparent.
- Margin visibility is poor, making it difficult to understand true ecommerce profitability.
- The brand has little control over how its products are presented, content, imagery, and the overall shopper experience.

The 3P model, where a brand or its authorised partner sells directly on the marketplace, addresses all of these. Equity control returns to the brand. Margin visibility improves dramatically. Content and brand experience are fully owned. And advertising efficiency increases because the brand holds the Buy Box consistently.

Why the transition is risky

The challenge isn't the destination. It's the journey. A 1P to 3P transition involves unwinding an existing wholesale relationship, managing inventory sell-down to prevent returns, activating 3P listings in a way that preserves organic ranking and review history, and cleaning up the seller landscape simultaneously. Done badly, it creates inventory gaps, out-of-stock periods, and revenue dips that can take months to recover from.

The strategic response

A successful transition requires a phased, tightly sequenced approach with clear decision gates at every stage. There are three priorities that must be addressed in order:

1. Inventory management.
Sell down 1P inventory strategically, preventing Amazon from returning unsold units while maintaining availability continuity for shoppers. This requires precise forecasting and close coordination with Amazon's vendor management team.

2. Seller environment stabilisation.
With assistance from an eControl law firm such as Vorys, work to stabilise the seller environment before or in lockstep with the 3P activation. Transitioning to 3P while grey-market sellers remain active will immediately fragment the Buy Box and undermine the commercial case for the move.

3. Listing continuity.
Preserve review history, ratings, and organic ranking through careful ASIN management and, where necessary, direct coordination with Amazon's brand registry and catalogue teams.

IN PRACTICE: Weider
Amazon DE, IT, ES, FR | 100 SKUs | Sports Nutrition

183%
Sales lift in Q2 2025, first quarter post-transition

31%
Increase in Buy Box ownership in four months

11
Previously delisted ASINs reinstated through compliance recovery

8 wks
From onboarding to first 3P sales live across four markets

Weider's transition was completed in eight weeks across four European marketplaces. The 183% sales lift in the first full quarter post-transition reflects what happens when the 3P foundation is built correctly: listings fully compliant from day one, with the seller environment stabilised through Vorys-led enforcement.*

** Pattern is not legally permitted to take enforcement action on a brand's behalf. Included in the Pattern model is Vorys, a third-party law firm at no extra cost, that uses Pattern's technology to help brands track unauthorised sellers and advises and assists with enforcement.*

BARRIER 3

Channel conflict and resource constraints

What's actually happening

Channel conflict in wellness ecommerce typically emerges gradually. A brand might have an internal ecommerce team managing Amazon, a distributor running other marketplace channels, a DTC site managed separately, and several third-party resellers operating without anyone's full knowledge or consent. Each part of that structure has different objectives, different operational logic, and different content standards.

The consumer, however, experiences all of it as one brand. And the inconsistencies show up in ways that erode trust slowly but persistently:

- The experience on Amazon doesn't match the DTC site.
- Imagery on one marketplace is two product generations old.
- A reseller is running a 30% promotion that directly contradicts the premium positioning the brand is investing in everywhere else.
- Customer reviews reference a product experience that doesn't reflect the current formulation.

Resource constraint is the fuel that keeps the conflict burning. Ecommerce demands expertise across content, advertising, compliance, logistics, and analytics simultaneously. Most in-house wellness teams are specialists in their product, not in marketplace operations. And the moments that demand the most capability, a rebrand, a product launch, a rapid scale-up, are exactly the moments when stretched teams are most likely to drop something.

The strategic response

Resolving channel conflict requires consolidating decision-making authority over ecommerce activity. That means establishing a single accountable function, whether internal or through a trusted partner, that owns brand ecommerce strategy and execution across all channels consistently. In practical terms, that means:

- Establishing and enforcing clear commercial standards across all sellers and channels.
- Maintaining a single content library that all channels draw from, so imagery, copy, and product information are always current and consistent.

- Aligning promotional calendars so that discounting on one channel doesn't undercut positioning on another.
- Building consolidated reporting infrastructure that gives a full-estate view of ecommerce performance in one place.

On the resource side, the most effective response for most wellness brands isn't to hire more people. It's to build a partnership model that extends capability without extending headcount, and that brings both the specialist expertise and the technology to execute at the standard the market demands, including during the high-complexity moments when it's needed most.

IN PRACTICE: Metagenics

Amazon UK, IT | 70 SKUs | Premium Supplements

413%

Year-on-year surge in brand searches on Amazon post-rebrand

94.8%

Buy Box rate maintained throughout the full rebrand transition

98.3%

Average in-stock rate from kickoff to completion

17%

Revenue growth delivered January to August 2025

Metagenics completed a full brand transition from Nutri Advanced without losing ratings, reviews, organic rankings, or subscriber continuity. The 413% uplift in brand search volume is the result of a simultaneous content, advertising, and brand experience refresh executed without a single significant gap in availability or control.

BARRIER 4

Internationalisation

What's actually happening

International expansion is one of the most attractive opportunities available to wellness brands right now.

But most wellness brands that struggle internationally don't fail because the market opportunity wasn't real. They fail for operational reasons: regulatory requirements they didn't fully map before launch, grey-market sellers establishing a presence before the brand arrived, consumer behaviour and platform preferences that don't translate directly from domestic experience, and logistics and import compliance infrastructure that was never built properly.

The strategic response

Successful international ecommerce expansion starts with deliberate market selection, then moves to building the right foundations in each market. Those foundations are consistent regardless of the territory:

Foundation	What it means in practice
Brand control from day one	Identify grey-market sellers before launch and have a legal and operational plan in place. Entering a market where unauthorised sellers are already active means competing against your own brand from the outset.
Localised content	Reflect the specific consumer behaviour, search habits, and cultural expectations of the market. A direct translation of domestic assets rarely performs well and can actively undermine brand credibility.
Regulatory compliance	Listings must meet the territory's requirements for labelling, ingredient disclosures, and health claim regulations before going live. Non-compliance risks delisting and reputational damage.

Platform diversification	Dominant platforms differ by market. In the UAE, Noon and Namshi command significant share alongside Amazon. Relying on a single marketplace limits reach and creates unnecessary concentration risk.
Logistics and fulfilment	Import compliance, warehousing, and last-mile delivery infrastructure all need to be purpose-built for each market. Domestic logistics arrangements rarely translate without significant adaptation.

The brands that expand internationally with confidence treat each new market as a deliberate strategic investment, not a side project managed by the domestic team.

IN PRACTICE: Hairburst

Amazon UAE, Noon, Namshi | 31 SKUs | Beauty

65%
Month-on-month growth on Noon Minutes

4.5x
Average ROAS across the full UAE marketplace portfolio

36%
Repeat customer rate, demonstrating sustained brand loyalty

28%↑50%
Sales mix shift from Amazon to Noon and Namshi

Hairburst's UAE expansion demonstrates the importance of both brand control and platform diversification simultaneously. Expanding beyond Amazon to Noon and Namshi wasn't just a hedge against platform dependency. It was a strategic response to the consumer behaviour of UAE shoppers. The 36% repeat customer rate is the clearest evidence this wasn't a short-term traffic play. It's brand equity being built in a new market.

SECTION 06

What winning looks like: *a maturity model*

The four barriers in this report aren't checkboxes. They're different steps towards strengthening your ecommerce offering, and most brands are at different stages. The goal isn't to be winning everywhere simultaneously from day one. It's to know honestly where you are, understand where you need to get to, and have a clear plan for closing the gap.

Area	Not yet	Getting there	Winning
Brand control	Unauthorised sellers active, Buy Box below 80%	Buy Box mostly held, some rogue sellers remain	Full Buy Box ownership, seller landscape clean
Profitability	Margin unclear, growing revenue at all costs	1P to 3P transition planned or underway	3P model live, margin healthy and improving
Channel strategy	Fragmented teams or sellers pulling in different directions	Consistent content and pricing on main channels	Fully integrated, every channel reinforcing the others
International	Domestic only, or entered markets without a plan	One or two markets live, operationally stretched	Multi-market presence, each one controlled and growing

How the dimensions compound

Brand control enables better advertising efficiency. Better advertising efficiency funds growth investment. A stronger channel strategy creates the consistency that international expansion requires. And international expansion, done right, generates the scale that makes every other dimension more efficient.

The brands pulling decisively ahead right now have reached a point where all four dimensions are reinforcing each other. That compounding flywheel is what effective ecommerce strategy is ultimately trying to build. The barriers in this report are what stand between most wellness brands and getting it turning.

> Ecommerce capability isn't something you either have or you don't. It's something you build, dimension by dimension, until the whole thing starts compounding. That's when the gap between you and the competition starts to widen in your favour.