

United States Hormone Therapy (Retail Side) Market By Product (Sex Hormones, Thyroid Hormones, Growth Hormones, Adrenal Hormones, Others), By Indication (Menopause & Andropause Management, Hypothyroidism, Hypogonadism, Growth Hormone Deficiency, Fertility Treatment, Others), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

Market Overview

United States Hormone Therapy (Retail Side) Market was valued at USD 10.80 Billion in 2024 and is expected to reach USD 14.09 Billion by 2030 with a CAGR of 4.73%. Hormone therapy involves the administration of hormones to treat a wide range of conditions, including menopause symptoms, thyroid disorders, testosterone deficiency, growth hormone deficiencies, and certain cancers. In recent years, the retail distribution of hormone therapies has expanded significantly, fueled by the increasing trend toward patient-centered care and home-based treatment. Many hormone therapies are now available in user-friendly formats such as oral tablets, transdermal patches, topical creams, and injectable pens, allowing for ease of use and greater adherence outside of clinical settings.

However, the retail hormone therapy market also faces challenges. These include ongoing debates over the long-term safety of certain hormone treatments particularly in postmenopausal women as well as concerns around misuse, overprescription, and the availability of unregulated or compounded hormone products. Moreover, insurance coverage for some therapies, especially bioidentical hormone treatments, can be inconsistent, impacting patient access and affordability.

Key Market Drivers

Growth in Healthcare Industry

In 2023, U.S. healthcare expenditures increased by 7.5%, reaching USD 4.9 trillion equating to approximately USD 14,570 per person. This spending represented 17.6% of the nation's Gross Domestic Product (GDP). The expanding healthcare industry in the United States is a pivotal factor propelling the growth of the hormone therapy market on the retail side. Advances in medical research, increased healthcare spending, and greater access to healthcare services have collectively contributed to a rising demand for hormone therapy products.

The population of Americans aged 65 and older is projected to grow from 58 million in 2022 to 82 million by 2050, representing a 47% increase. Additionally, this age group's proportion of the total U.S. population is expected to rise from 17% to 23%. With an aging population and a growing prevalence of hormone-related conditions such as menopause, osteoporosis, and hypogonadism, healthcare providers are increasingly recommending hormone replacement therapies (HRT) to improve patient quality of life. This trend is further amplified by the heightened awareness and acceptance of hormone therapies among patients, driven by education and outreach efforts.

Key Market Challenges

Disruptions in Supply Chain

Disruptions in the supply chain pose a significant challenge to the United States Hormone Therapy Market on the retail side. The production and distribution of hormone therapies depend on a complex network of raw material suppliers, manufacturers, distributors, and retail pharmacies. Any interruption at any point in this chain whether due to manufacturing delays, shortages of active pharmaceutical ingredients (APIs), transportation bottlenecks, or regulatory hurdles can lead to product scarcity and delayed availability at the retail level.

Such supply chain disruptions not only affect the timely delivery of hormone therapies but can also impact pricing and inventory management. Pharmacies may face difficulties in maintaining consistent stock levels, which in turn can undermine patient adherence and trust. Patients requiring continuous hormone therapy, such as those undergoing hormone replacement therapy or managing endocrine disorders, are

particularly vulnerable to interruptions, as inconsistent access can lead to suboptimal treatment outcomes and increased healthcare costs.

Key Market Trends

Integration of Telehealth and Online Platforms

The integration of telehealth services and online platforms is emerging as a significant trend in the United States hormone therapy market, particularly on the retail side. A national study analyzing private insurance claims data from 36 million working-age individuals revealed a 766% increase in telemedicine encounters during the first three months of the pandemic. This trend aligns with findings from Doximity, an online medical networking platform representing approximately 1.8 million physicians about 80% of the U.S. physician workforce which estimated that nearly 20% of all healthcare visits in the U.S. in 2020 were conducted via telemedicine based on private claims data. This shift is driven by evolving consumer preferences for convenience, accessibility, and personalized healthcare solutions.

Telehealth enables patients to consult healthcare professionals remotely, reducing barriers such as geographic distance, time constraints, and mobility issues. This is especially beneficial for hormone therapy patients, who often require ongoing consultations and monitoring. The ability to receive expert guidance and prescriptions through virtual channels has made hormone therapy more accessible to a broader demographic, including those in rural or underserved areas.

Key Market Players

CVS Health

Walgreens Boots Alliance, Inc.

Walmart Pharmacy

Rite Aid Corp

The Kroger Co.

Albertsons

Costco Wholesale Corporation

Mark Cuban Cost Plus Drug Company, PBC

Blink Health Administration LLC, Inc.

GoodRx, Inc.

Report Scope

In this report, the United States Hormone Therapy (Retail Side) Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

United States Hormone Therapy (Retail Side) Market, By Product:

Sex Hormones

Thyroid Hormones

Growth Hormones

Adrenal Hormones

Others

United States Hormone Therapy (Retail Side) Market, By Indication:

Menopause & Andropause Management

Hypothyroidism

Hypogonadism

Growth Hormone Deficiency

Fertility Treatment

Others

United States Hormone Therapy (Retail Side) Market, By Region:

Northeast

Midwest

South

West

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the United States Hormone Therapy (Retail Side) Market.

Available Customizations:

United States Hormone Therapy (Retail Side) Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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