



Euromonitor
International

Consumer Health in Saudi Arabia

October 2024

Table of Contents

EXECUTIVE SUMMARY

Consumer health in 2024: The big picture
2024 key trends
Competitive landscape
Retailing developments
What next for consumer health?

MARKET INDICATORS

Table 1 - Consumer Expenditure on Health Goods and Medical Services: Value 2019-2024
Table 2 - Life Expectancy at Birth 2019-2024

MARKET DATA

Table 3 - Sales of Consumer Health by Category: Value 2019-2024
Table 4 - Sales of Consumer Health by Category: % Value Growth 2019-2024
Table 5 - NBO Company Shares of Consumer Health: % Value 2020-2024
Table 6 - LBN Brand Shares of Consumer Health: % Value 2021-2024
Table 7 - Penetration of Private Label in Consumer Health by Category: % Value 2019-2024
Table 8 - Distribution of Consumer Health by Format: % Value 2019-2024
Table 9 - Distribution of Consumer Health by Format and Category: % Value 2024
Table 10 - Forecast Sales of Consumer Health by Category: Value 2024-2029
Table 11 - Forecast Sales of Consumer Health by Category: % Value Growth 2024-2029

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

KEY DATA FINDINGS

2024 DEVELOPMENTS

Further price increases for analgesics but demand remains stable
Tabuk launches Migrotan to address symptoms of migraine
GSK Consumer Healthcare strengthens leadership of analgesics

PROSPECTS AND OPPORTUNITIES

Stronger growth opportunities for analgesics over the forecast period
Localising the pharmaceutical industry
Pharmacies set to remain dominant distribution channels

CATEGORY DATA

Table 12 - Sales of Analgesics by Category: Value 2019-2024
Table 13 - Sales of Analgesics by Category: % Value Growth 2019-2024
Table 14 - NBO Company Shares of Analgesics: % Value 2020-2024

Table 15 - LBN Brand Shares of Analgesics: % Value 2021-2024

Table 16 - Forecast Sales of Analgesics by Category: Value 2024-2029

Table 17 - Forecast Sales of Analgesics by Category: % Value Growth 2024-2029

Sleep Aids in Saudi Arabia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- New product launch adds greater variety to sleep aid solutions for local consumers
- Jamjoom Pharma strengthens lead of sleep aids
- Global e-commerce platforms continue to compete with local pharmacies

PROSPECTS AND OPPORTUNITIES

- Increasing awareness will continue to support sleep aids
- A rising number of sleep disorder clinics in Saudi Arabia
- Pharmacies to remain key players in Saudi Arabia’s distribution landscape

CATEGORY DATA

Table 18 - Sales of Sleep Aids: Value 2019-2024

Table 19 - Sales of Sleep Aids: % Value Growth 2019-2024

Table 20 - NBO Company Shares of Sleep Aids: % Value 2020-2024

Table 21 - LBN Brand Shares of Sleep Aids: % Value 2021-2024

Table 22 - Forecast Sales of Sleep Aids: Value 2024-2029

Table 23 - Forecast Sales of Sleep Aids: % Value Growth 2024-2029

Cough, Cold and Allergy (Hay Fever) Remedies in Saudi Arabia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Solid value growth driven by further price increases, but demand for important cough, cold, and allergy (hay fever) remedies continues to rise
- New launches continue to expand the category in Saudi Arabia
- SPIMACO continues to lead cough, cold and allergy (hay fever) remedies

PROSPECTS AND OPPORTUNITIES

- Further growth opportunities over the forecast period
- Impact of tourism and economic diversification on healthcare needs
- Pharmacies to remain as dominant distribution channel

CATEGORY DATA

Table 24 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2019-2024

Table 25 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2019-2024

Table 26 - NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2020-2024

Table 27 - LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2021-2024

Table 28 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2024-2029

Table 29 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2024-2029

Dermatologicals in Saudi Arabia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Increase in prices offset with promotional activities
- New launches by local, regional and international players within dermatologicals

Saudi International Trading Co Ltd SITCO strengthens lead of dermatologicals

PROSPECTS AND OPPORTUNITIES

Saudi Arabia’s weather conditions to continue driving growth
Further competition likely to stem from dermocosmetics
Evolving landscape of pharmacies in Saudi Arabia

CATEGORY DATA

- Table 30 - Sales of Dermatologicals by Category: Value 2019-2024
- Table 31 - Sales of Dermatologicals by Category: % Value Growth 2019-2024
- Table 32 - NBO Company Shares of Dermatologicals: % Value 2020-2024
- Table 33 - LBN Brand Shares of Dermatologicals: % Value 2021-2024
- Table 34 - LBN Brand Shares of Hair Loss Treatments: % Value 2021-2024
- Table 35 - Forecast Sales of Dermatologicals by Category: Value 2024-2029
- Table 36 - Forecast Sales of Dermatologicals by Category: % Value Growth 2024-2029

Digestive Remedies in Saudi Arabia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Reliance on dining out and lifestyle diseases influence demand for digestive remedies
Digestive remedies observes further price increases
Two convincing leaders of digestive remedies

PROSPECTS AND OPPORTUNITIES

The growing incidence of digestive disorders due to diet and lifestyle
The rising use of diabetes/weight loss medications likely to support category
Pharmacies to remain as leading distribution channel

CATEGORY DATA

- Table 37 - Sales of Digestive Remedies by Category: Value 2019-2024
- Table 38 - Sales of Digestive Remedies by Category: % Value Growth 2019-2024
- Table 39 - NBO Company Shares of Digestive Remedies: % Value 2020-2024
- Table 40 - LBN Brand Shares of Digestive Remedies: % Value 2021-2024
- Table 41 - Forecast Sales of Digestive Remedies by Category: Value 2024-2029
- Table 42 - Forecast Sales of Digestive Remedies by Category: % Value Growth 2024-2029

Eye Care in Saudi Arabia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Several factors contribute to demand for eye care in Saudi Arabia
“Eyenai” solution launched in the Kingdom
Jamjoom Pharma continues to lead fragmented competitive landscape

PROSPECTS AND OPPORTUNITIES

Digital lifestyles and climate to support further growth of eye care
A rising number of eye care centres in Saudi Arabia
Private label has potential to grow, supported by leading pharmacies

CATEGORY DATA

- Table 43 - Sales of Eye Care by Category: Value 2019-2024
- Table 44 - Sales of Eye Care by Category: % Value Growth 2019-2024

Table 45 - NBO Company Shares of Eye Care: % Value 2020-2024

Table 46 - LBN Brand Shares of Eye Care: % Value 2021-2024

Table 47 - Forecast Sales of Eye Care by Category: Value 2024-2029

Table 48 - Forecast Sales of Eye Care by Category: % Value Growth 2024-2029

NRT Smoking Cessation Aids in Saudi Arabia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Limited awareness and availability of NRT cessation aids impacts demand
- Badael's anniversary
- GSK Consumer Healthcare strengthens dominance of NRT smoking cessation aids

PROSPECTS AND OPPORTUNITIES

- Government's ongoing initiatives and regulations to reduce smoking rates
- E-vapour products to offer further competition to NRT smoking cessation aids
- Pharmacies to remain as dominant distribution channel

CATEGORY INDICATORS

Table 49 - Number of Smokers by Gender 2019-2024

CATEGORY DATA

Table 50 - Sales of NRT Smoking Cessation Aids by Category: Value 2019-2024

Table 51 - Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2019-2024

Table 52 - NBO Company Shares of NRT Smoking Cessation Aids: % Value 2020-2024

Table 53 - LBN Brand Shares of NRT Smoking Cessation Aids: % Value 2021-2024

Table 54 - Forecast Sales of NRT Smoking Cessation Aids by Category: Value 2024-2029

Table 55 - Forecast Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2024-2029

Wound Care in Saudi Arabia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Greater awareness and occupational requirements support wound care
- Consumers continue to favour wide variety of wound care but waterproof options are most popular
- Nexcare remains leading brand with wide range of wound care options

PROSPECTS AND OPPORTUNITIES

- Several factors to support future demand for wound care but awareness can be improved
- The surge in physical and sporting activities a significant growth driver
- Growth of private label wound care supported by Saudi pharmacies

CATEGORY DATA

Table 56 - Sales of Wound Care by Category: Value 2019-2024

Table 57 - Sales of Wound Care by Category: % Value Growth 2019-2024

Table 58 - NBO Company Shares of Wound Care: % Value 2020-2024

Table 59 - LBN Brand Shares of Wound Care: % Value 2021-2024

Table 60 - Forecast Sales of Wound Care by Category: Value 2024-2029

Table 61 - Forecast Sales of Wound Care by Category: % Value Growth 2024-2029

Sports Nutrition in Saudi Arabia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Rising participation in sports and physical activity supports category growth
Local consumers embrace convenience and variety offered online
Optimum Nutrition is leading brand but is under pressure from smaller competitors

PROSPECTS AND OPPORTUNITIES

Greater health awareness to sustain future growth
Growth in sports participation to continue driving demand
Emergence of new product developments in sports nutrition

CATEGORY DATA

Table 62 - Sales of Sports Nutrition by Category: Value 2019-2024
Table 63 - Sales of Sports Nutrition by Category: % Value Growth 2019-2024
Table 64 - NBO Company Shares of Sports Nutrition: % Value 2020-2024
Table 65 - LBN Brand Shares of Sports Nutrition: % Value 2021-2024
Table 66 - Forecast Sales of Sports Nutrition by Category: Value 2024-2029
Table 67 - Forecast Sales of Sports Nutrition by Category: % Value Growth 2024-2029

Dietary Supplements in Saudi Arabia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Consumers increasingly switch to convenient combination dietary supplements
Manayer Najd Medical Co retains slim lead, while Jamjoom Pharma makes further gains
Consumers take omnichannel approach to purchases as pharmacies and online variety boost sales

PROSPECTS AND OPPORTUNITIES

Positive outlook for dietary supplements as consumers maintain health focus
Health insurance coverage to support dietary supplements
Pharmacies and other specialists to remain important distribution channels

CATEGORY DATA

Table 68 - Sales of Dietary Supplements by Category: Value 2019-2024
Table 69 - Sales of Dietary Supplements by Category: % Value Growth 2019-2024
Table 70 - Sales of Dietary Supplements by Positioning: % Value 2019-2024
Table 71 - NBO Company Shares of Dietary Supplements: % Value 2020-2024
Table 72 - LBN Brand Shares of Dietary Supplements: % Value 2021-2024
Table 73 - Forecast Sales of Dietary Supplements by Category: Value 2024-2029
Table 74 - Forecast Sales of Dietary Supplements by Category: % Value Growth 2024-2029

Vitamins in Saudi Arabia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Post-pandemic demand for vitamins remains strong as consumers remain concerned with supporting their overall health
Cigalah Group retains lead of vitamins, but Centrum remains most popular brand
E-commerce continues to grow, fostering holistic omnichannel approach

PROSPECTS AND OPPORTUNITIES

Ongoing focus on supporting the immune system to drive vitamins, while players will increasingly target specific needs of certain demographics
Health insurance coverage for vitamins to support future growth
Pharmacies and other specialists to remain important distribution channels

CATEGORY DATA

- Table 75 - Sales of Vitamins by Category: Value 2019-2024
- Table 76 - Sales of Vitamins by Category: % Value Growth 2019-2024
- Table 77 - Sales of Multivitamins by Positioning: % Value 2019-2024
- Table 78 - NBO Company Shares of Vitamins: % Value 2020-2024
- Table 79 - LBN Brand Shares of Vitamins: % Value 2021-2024
- Table 80 - Forecast Sales of Vitamins by Category: Value 2024-2029
- Table 81 - Forecast Sales of Vitamins by Category: % Value Growth 2024-2029

Weight Management and Wellbeing in Saudi Arabia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- High obesity rates which contribute to lifestyle diseases support elevated demand for OTC obesity
- Weight management and wellbeing continues to witness fierce competition
- Cambridge Weight Plan retains overall leadership but loses further share

PROSPECTS AND OPPORTUNITIES

- Emergence of new brands and products tailored to consumer preferences
- Consumers adopting health and wellness goals can still support future growth
- E-commerce set to gain further penetration of category

CATEGORY DATA

- Table 82 - Sales of Weight Management and Wellbeing by Category: Value 2019-2024
- Table 83 - Sales of Weight Management and Wellbeing by Category: % Value Growth 2019-2024
- Table 84 - NBO Company Shares of Weight Management and Wellbeing: % Value 2020-2024
- Table 85 - LBN Brand Shares of Weight Management and Wellbeing: % Value 2021-2024
- Table 86 - Forecast Sales of Weight Management and Wellbeing by Category: Value 2024-2029
- Table 87 - Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2024-2029

Herbal/Traditional Products in Saudi Arabia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- The reach of herbal/traditional products remains significant in Saudi Arabia
- Herbal/traditional treatments remain relevant for common ailments
- Saudi Pharmaceutical Industries & Medical Appliances Corp leads fragmented landscape
- E-commerce continues to gain ground as distribution channel

PROSPECTS AND OPPORTUNITIES

- Growing demand for natural ingredients to support category over forecast period
- Research to support further growth of herbal/traditional products
- Potential for expansion of private label lines by leading pharmacies

CATEGORY DATA

- Table 88 - Sales of Herbal/Traditional Products by Category: Value 2019-2024
- Table 89 - Sales of Herbal/Traditional Products by Category: % Value Growth 2019-2024
- Table 90 - NBO Company Shares of Herbal/Traditional Products: % Value 2020-2024
- Table 91 - LBN Brand Shares of Herbal/Traditional Products: % Value 2021-2024
- Table 92 - Forecast Sales of Herbal/Traditional Products by Category: Value 2024-2029
- Table 93 - Forecast Sales of Herbal/Traditional Products by Category: % Value Growth 2024-2029

KEY DATA FINDINGS

2024 DEVELOPMENTS

Parents aim to strengthen children's immunity, driving demand for paediatric vitamins and dietary supplements
New launches continue to emerge from local, regional and international players
Saudi Pharmaceutical Industries & Medical Appliances Corp retains lead of paediatric consumer health

PROSPECTS AND OPPORTUNITIES

Greater exposure to viruses to support future category growth
Innovation in paediatric consumer health formulations
Pharmacies to remain trusted source for purchases of paediatric consumer health

CATEGORY DATA

- Table 94 - Sales of Paediatric Consumer Health by Category: Value 2019-2024
- Table 95 - Sales of Paediatric Consumer Health by Category: % Value Growth 2019-2024
- Table 96 - NBO Company Shares of Paediatric Consumer Health: % Value 2020-2024
- Table 97 - LBN Brand Shares of Paediatric Consumer Health: % Value 2021-2024
- Table 98 - Forecast Sales of Paediatric Consumer Health by Category: Value 2024-2029
- Table 99 - Forecast Sales of Paediatric Consumer Health by Category: % Value Growth 2024-2029

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-saudi-arabia/report.