Consumer Health in Saudi Arabia

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Consumer health in 2023: The big picture
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Competitive landscape
Retailing developments
What next for consumer health?

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Analgesics in Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS
Analgesics witness stock shortages, which lead to brand and category switching
Topical analgesics anaesthetic continues to see range expansion and new entrants
GSK Consumer Healthcare continues to lead analgesics

PROSPECTS AND OPPORTUNITIES
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Pharmacies set to continue to lead distribution, despite rise of e-commerce

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Global e-commerce continues to compete with local pharmacies
Jamjoom Pharma takes the lead in sleep aids

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KEY DATA FINDINGS

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Cough, cold and allergy (hay fever) remedies witnesses stock shortages
SPIMACO extends its lead in cough, cold and allergy (hay fever) remedies

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Dermatologicals in Saudi Arabia

KEY DATA FINDINGS

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SITCO continues to lead dermatologicals thanks to Bepanthen
Price remains important, with consumers increasingly considering private label
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Government aims to localise the production of pharmaceuticals
Pharmacies to remain the leading distribution channel despite rise of e-commerce

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Digestive Remedies in Saudi Arabia

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Demand rises, but stock shortages seen for some digestive remedies
Digestive enzymes is back thanks to a new entrant
Cigalah Group takes the lead in digestive remedies with its wide-ranging portfolio

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Pharmacies to remain the leading channel, despite growth for e-commerce
Increasing localisation of production

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Eye Care in Saudi Arabia

KEY DATA FINDINGS

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Multiple factors continue to support demand in eye care
Eye drops remains the leading format, although gel is becoming more popular
Jamjoom Pharma leads eye care, but “others” dominates

PROSPECTS AND OPPORTUNITIES
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Localising production, and the dominance of pharmacies

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NRT Smoking Cessation Aids in Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS
Government steps up its efforts to curb smoking as part of Vision 2030
Nicotinell dominates NRT smoking cessation aids, but a challenger arrives
Pharmacies remains the leading distribution channel

PROSPECTS AND OPPORTUNITIES
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Wound Care in Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS
Increased awareness and greater activity support continued demand
Consumers continue to favour waterproof wound care products
Nexcare continues to lead, while Nahdi extends its range

PROSPECTS AND OPPORTUNITIES
Physical and sporting activities set to support demand, but constraints will remain
Private label and "others" likely to continue growing
Despite growth for e-commerce, pharmacies will remain the leading channel

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Sports Nutrition in Saudi Arabia

KEY DATA FINDINGS
2023 DEVELOPMENTS
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Sports nutrition moves towards purposes other than muscle-building
AmCan International Group continues to lead, and Eric Favre enters the market

PROSPECTS AND OPPORTUNITIES
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Localising production will increase availability
Despite already being dominant, e-commerce is set to continue growing

CATEGORY DATA
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Dietary Supplements in Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS
Growth continues due to greater knowledge, and the lifting of Hajj restrictions
Local pharmacies hold up well against the competition from global e-commerce
Manayer Najd Medical maintains its lead, but other players compete with launches

PROSPECTS AND OPPORTUNITIES
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iHerb’s new global distribution centre will contribute to growth for e-commerce
Investment company Lifera set to increase localisation in dietary supplements

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Vitamins in Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS
Growth continues, and more consumers opt for targeted multivitamins
Global e-commerce continues to compete with local pharmacies
Cigalah Group continues to lead vitamins, but GSK remains a close second

PROSPECTS AND OPPORTUNITIES
Solid growth due to focus on immunity, and switches in product formats
Despite challenge from e-commerce, pharmacies set to remain the leading channel
Further potential to localise the production of vitamins
KEY DATA FINDINGS

2023 DEVELOPMENTS
Sales of herbal/traditional products continue to grow as restrictions are lifted
Global e-commerce continues to compete with local pharmacies
Strong competition in a fragmented category

PROSPECTS AND OPPORTUNITIES
Herbal/traditional products set to maintain solid growth
E-commerce expected to maintain its growth trend
Rising local production of pharmaceuticals

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Paediatric Consumer Health in Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS
Stagnation for weight management and wellbeing as the peak of demand eases
Fierce competition from products outside of weight management and wellbeing
Cambridge Weight Plan leads the way, but strong development from other players

PROSPECTS AND OPPORTUNITIES
Rising awareness of maintaining a healthy weight set to spur growth
Vision 2030 and the launch of Lifera set to ensure greater production localisation
Outlet growth for pharmacies will ensure it remains the leading distribution channel

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Weight Management and Wellbeing in Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS
Sales of herbal/traditional products continue to grow as restrictions are lifted
Global e-commerce continues to compete with local pharmacies
Strong competition in a fragmented category

PROSPECTS AND OPPORTUNITIES
Herbal/traditional products set to maintain solid growth
E-commerce expected to maintain its growth trend
Rising local production of pharmaceuticals

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KEY DATA FINDINGS

2023 DEVELOPMENTS

Weaker immunity drives continued growth in demand
Parents look to maintain their children’s health through preventive products
SPIMACO extends its lead in paediatric consumer health

PROSPECTS AND OPPORTUNITIES

Demand expected across paediatric consumer health as parental concern rises
Localising production will also contribute to growth
Pharmacies will continue to lead distribution, despite competition from e-commerce

CATEGORY DATA

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