

Saudi Arabia Dermatological Drugs Market, By Therapy (Acne, Psoriasis, Rosacea, Alopecia, Others), By Type (Prescription, Over the counter (OTC)), By Route of Administration (Topical Administration, Oral Administration, Parenteral Administration), By Drug Class (Corticosteroids, Retinoids, Antibiotics, Antifungals, Calcineurin Inhibitors, Others), By Distribution Channel (Hospital Pharmacies, Retail Pharmacies, Others), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

Saudi Arabia Dermatological Drugs Market was valued at USD 331.45 Million in 2024 and is anticipated to project impressive growth in the forecast period with a CAGR of 6.85% through 2030. The dermatological drugs market in Saudi Arabia is undergoing robust expansion, fueled by heightened consumer awareness about skincare, a growing incidence of dermatological conditions, and significant advancements in therapeutic solutions. Shifting lifestyle patterns, escalating pollution levels, and increasing stress have contributed to a notable rise in conditions such as acne, atopic dermatitis, and psoriasis.

This market is strategically positioned for sustained growth, driven by progressive regulatory support, enhanced healthcare infrastructure, and an evolving distribution landscape. The burgeoning demand for aesthetic dermatology and innovative skincare solutions highlights a shift towards premium and specialized treatments, underscoring a lucrative growth trajectory.

Saudi Arabia's dermatological drugs sector represents a vibrant and evolving market with substantial opportunities. It provides a competitive platform for both domestic and international pharmaceutical players to leverage cutting-edge innovation and meet the sophisticated demands of an increasingly health-conscious population.

Key Market Drivers

Rising Prevalence of Dermatological Conditions

The rising prevalence of dermatological conditions in Saudi Arabia is a primary growth driver for the dermatological drugs market, significantly influencing both demand dynamics and market strategies. The increasing incidence of skin disorders such as acne, psoriasis, eczema, and atopic dermatitis highlights critical unmet medical needs and shifts in consumer priorities, creating substantial opportunities for pharmaceutical and healthcare companies. Rapid urbanization in Saudi Arabia has led to increased exposure to pollutants, which contribute to inflammatory skin conditions such as acne and eczema. High consumption of processed and high-sugar diets has been linked to skin issues, further driving the demand for effective treatments. Saudi Arabia's hot and dry climate, coupled with high UV radiation levels, exacerbates skin dryness and increases the prevalence of conditions such as eczema and rosacea. Hard water and other environmental stressors in certain areas aggravate skin sensitivities, necessitating specialized dermatological care. Psoriasis and Atopic Dermatitis: Chronic and recurrent conditions like psoriasis and atopic dermatitis require ongoing treatment, fueling sustained demand for advanced therapies, including biologics and targeted treatments. Fungal and Bacterial Infections: Warm and humid conditions in some regions contribute to the spread of fungal infections, further expanding the scope of dermatological care. The prevalence of atopic dermatitis (AD) among adults across various provinces in Saudi Arabia ranges from 6% to 13%. This condition, marked by severe itching and recurrent eczematous lesions, arises from a combination of genetic predisposition, skin barrier dysfunction, and immune system dysregulation. In Saudi Arabia, psoriasis has been reported to affect approximately 5.33% of the population in the northern region, while prevalence rates in the southern and eastern regions are 3.4% and 1.5%, respectively.

The growing incidence of skin disorders has led to a higher number of dermatology consultations, both in hospitals and private clinics, directly boosting prescription rates for dermatological drugs. A systematic review of studies conducted in Saudi Arabia identified the five most commonly diagnosed skin disorders as follows: diseases of skin

appendages (24.8%), dermatitis (24%), skin infections (18.5%), pigmentary disorders (16.1%), and papulosquamous disorders (5.3%). Chronic and severe skin conditions are driving demand for innovative therapies such as biologics, which provide long-term relief for patients with autoimmune dermatological disorders. Topical and systemic treatments tailored for sensitive skin and recurring issues are becoming increasingly popular. As awareness grows around early intervention, consumers are seeking preventive measures for skin conditions. This includes not only prescription medications but also cosmeceutical products, further broadening the market. Pharmaceutical players are ramping up research and development (R&D) to address the specific needs of Saudi consumers, introducing tailored solutions that cater to the local climate and lifestyle. Partnerships between global corporations and local manufacturers have facilitated the availability of cost-effective and innovative dermatological drugs. The rising burden of skin disorders has encouraged higher allocations in healthcare budgets, including funding for public health campaigns that raise awareness about early diagnosis and treatment options. Companies are expanding their product offerings to include advanced biologics, oral medications, and topical treatments, catering to a wide spectrum of dermatological conditions.

Growing Awareness of Skin Health and Aesthetic Care

The growing awareness of skin health and aesthetic care is a pivotal driver of growth in the Saudi Arabia dermatological drugs market. Shifts in consumer behavior, a stronger emphasis on self-care, and the rising influence of global trends have fueled demand for advanced dermatological treatments and cosmetic solutions. This increased focus on skin health represents a significant opportunity for pharmaceutical companies, healthcare providers, and cosmetic brands to align their offerings with evolving market expectations. In contrast, our findings reported Botox utilization at 15%. Furthermore, the results differed from another Saudi study where the most commonly reported procedures were dermal fillers (43%) and rhinoplasty (42%). Similarly, the findings diverged from a Jordanian study, where 80.6% of participants opted for Botulinum toxin (BoNT) treatments and dermal fillers. These variations in outcomes may be attributed to differences in social preferences and cultural trends influencing the selection of non-surgical facial aesthetic (NSFA) procedures across the populations in these countries.

Enhanced access to healthcare information through digital platforms and social media has empowered consumers to understand the importance of skin health and seek timely interventions. Rising awareness about the benefits of early treatment and preventive skincare has driven demand for products and therapies targeting acne, pigmentation, and other common conditions. Public health campaigns and awareness initiatives by

clinics, hospitals, and government bodies emphasize the importance of dermatological health, encouraging individuals to adopt proactive skincare routines. Social platforms have amplified the importance of flawless and youthful skin, leading to increased consumer interest in treatments such as anti-aging therapies, chemical peels, and laser procedures. A blend of cosmetics and pharmaceuticals, cosmeceuticals address both aesthetic and therapeutic needs, bridging the gap between skincare and medical treatments. Safer, non-invasive procedures like Botox, fillers, and microneedling have gained traction among individuals seeking aesthetic improvements without significant downtime. Saudi Arabia's predominantly youthful population is highly receptive to aesthetic treatments, driving growth in both preventive and corrective dermatological products. Higher income levels have allowed consumers to invest more in premium skincare products and advanced aesthetic treatments, boosting market value.

With growing awareness, more individuals are consulting dermatologists for both medical and cosmetic concerns, increasing prescription drug sales and demand for professional skincare advice. The fusion of beauty and medicine has created a thriving cosmeceutical market, with companies introducing innovative products that address specific skin concerns while enhancing appearance. Local and international brands are increasingly competing in this segment, offering a variety of solutions tailored to the Saudi market. The rise in specialized dermatological and aesthetic clinics in urban centers is making advanced treatments more accessible to consumers. Enhanced availability of FDA-approved products and procedures has reinforced consumer trust and encouraged adoption. Virtual consultations and digital platforms have made dermatological advice more accessible, especially in remote areas, further driving awareness and market demand. E-commerce platforms have facilitated the sale of dermatological drugs and skincare products, broadening reach and convenience. Biotech and pharmaceutical companies are introducing cutting-edge treatments such as biologics and targeted therapies, catering to both therapeutic and aesthetic needs. Advanced formulations with anti-aging, brightening, and hydrating properties resonate strongly with the informed consumer base.

Advancements in Dermatological Treatments and Technologies

Advancements in dermatological treatments and technologies are crucial drivers of the growth of the Saudi Arabia dermatological drugs market. The continuous evolution of medical technologies, drug formulations, and treatment methodologies has enhanced the effectiveness, safety, and accessibility of dermatological care, leading to increased demand for specialized dermatological drugs. This progress not only addresses a broader spectrum of skin conditions but also aligns with the growing consumer demand

for innovative and personalized treatment options. Biologic therapies, such as monoclonal antibodies and cytokine inhibitors, have significantly improved the management of chronic and severe skin conditions like psoriasis, atopic dermatitis, and eczema. These therapies target specific pathways involved in disease progression, offering long-term relief and reducing reliance on traditional systemic treatments. Biologics and targeted therapies are highly effective in treating resistant skin conditions, offering patients personalized treatment options with fewer side effects, which enhances patient compliance and satisfaction.

Innovations in topical dermatological drugs, such as corticosteroids, retinoids, and antifungal treatments, have led to more effective and faster-acting solutions. Enhanced drug delivery systems, such as nano-based carriers and liposomal formulations, improve skin penetration and ensure better absorption, leading to optimized therapeutic outcomes. Advanced formulations are designed to minimize side effects and increase patient adherence, which is critical for long-term conditions like acne or psoriasis, where consistent treatment is necessary. Technologies like laser therapy, radiofrequency treatment, and chemical peels have gained widespread adoption for aesthetic purposes. These non-invasive procedures cater to growing consumer demand for youthful, healthy skin with minimal downtime. Advances in skin rejuvenation techniques, such as botulinum toxin injections (e.g., Botox) and dermal fillers, offer tailored solutions for individuals seeking aesthetic improvements without undergoing surgery, thus expanding the scope of the dermatological drugs market. The application of stem cell therapy and regenerative medicine is emerging as a promising approach to treat skin disorders like scars, burns, and aging skin. These therapies promote the regeneration of healthy skin tissue, offering long-term and effective solutions for patients with challenging dermatological conditions. As research progresses and the safety of these treatments becomes more established, the market for regenerative dermatology is expected to grow significantly, particularly in aesthetic and reconstructive dermatology.

Key Market Challenges

High Cost of Advanced Dermatological Treatments

One of the most significant barriers to growth in the Saudi Arabia dermatological drugs market is the high cost of advanced treatments, particularly biologics and specialized dermatological drugs. These treatments, often required for chronic skin conditions like psoriasis and atopic dermatitis, tend to be expensive due to their complex production processes and cutting-edge formulations.

High treatment costs may limit access to these advanced drugs for a significant portion of the population, especially in a market where healthcare spending is still growing but not yet fully equitable. Although Saudi Arabia's healthcare system has seen vast improvements, not all insurance policies cover advanced dermatological therapies, leaving patients to bear the financial burden. This further reduces the market's reach to lower- and middle-income groups. High costs may delay the adoption of newer treatments, especially among cost-conscious consumers and institutions. In the long run, this can impede the market's potential growth, particularly in underserved areas.

Pharmaceutical companies may need to focus on cost-reduction strategies, such as local production of biologics, pricing strategies tailored to local market conditions, and stronger partnerships with insurance companies to broaden access to these treatments.

Regulatory and Market Access Challenges

Despite improvements in Saudi Arabia's regulatory environment under Vision 2030, navigating the regulatory and approval processes for dermatological drugs can still be a time-consuming and complex endeavor. Stringent regulations, approval delays, and inconsistent enforcement across various levels of healthcare providers can create obstacles for new drugs entering the market.

Regulatory hurdles can delay the entry of innovative dermatological treatments, particularly in cases where products are imported from international markets. Approval delays lead to missed opportunities for pharmaceutical companies and reduce market competitiveness. Companies looking to enter the Saudi dermatological drugs market need to ensure compliance with local regulations and standards, which can vary in terms of labeling, marketing, and safety requirements. This can be a challenge for international firms looking to introduce new treatments to the Saudi market. Regulatory challenges may prevent the introduction of certain advanced dermatological therapies, limiting the range of available treatments for patients.

Companies must invest in local regulatory expertise and streamline approval processes to ensure timely market entry. Partnerships with local stakeholders, including regulatory bodies and healthcare providers, can also help improve market access.

Key Market Trends

Surge in Demand for Advanced Dermatological Treatments and Biologics

The increasing prevalence of chronic dermatological conditions such as psoriasis, eczema, and atopic dermatitis, combined with the rising demand for specialized treatments, is leading to an expanded role for advanced therapies like biologics. These biologic treatments, which target specific immune pathways, offer patients more effective and long-lasting relief from skin conditions that have traditionally been challenging to treat.

Biologic treatments are increasingly becoming a first-line solution for severe skin conditions, offering patients new hope and more personalized care. This has led to greater investments in biologic drug development, which will continue to increase as pharmaceutical companies target unmet needs in dermatology. As biologics become more widely available and more affordable due to increasing competition and innovations in treatment formulations, their adoption in treating chronic dermatological diseases will rise significantly, fueling demand for dermatological drugs.

Growing Influence of Aesthetic Dermatology and Non-Invasive Procedures

A significant shift is occurring in the Saudi Arabian healthcare market towards aesthetic dermatology, which combines the science of dermatology with cosmetic enhancements. This trend is largely driven by a growing consumer focus on skincare, beauty, and anti-aging solutions. Non-invasive aesthetic procedures like Botox injections, chemical peels, and laser treatments are becoming increasingly popular, supported by their convenience and relatively lower costs compared to traditional surgical alternatives.

Aesthetic dermatology is expanding beyond traditional treatments to include a broader range of solutions, including injectables, skin rejuvenation products, and fillers. Pharmaceutical companies are increasingly developing products specifically for cosmetic applications, which enhances the overall demand for dermatological drugs. Consumers are placing greater emphasis on maintaining youthful appearances, which is pushing the demand for innovative skincare solutions. This has created a lucrative market for dermal fillers, anti-aging formulations, and topical aesthetic treatments that cater to both medical and cosmetic dermatology.

Segmental Insights

Type Insights

Based on the category of Type, the Prescription segment emerged as the dominant in the Saudi Arabia Dermatological Drugs market in 2024. Conditions such as psoriasis,

eczema, atopic dermatitis, and acne require long-term management, which drives demand for prescription-based therapies. These conditions often cannot be managed effectively through over the counter (OTC) products alone, necessitating the use of stronger, specialized treatments that can only be prescribed by healthcare professionals. Many chronic dermatological diseases, such as autoimmune skin disorders, require advanced treatments like biologics, immunosuppressants, and systemic drugs. These treatments are often administered under the supervision of dermatologists, making the prescription segment crucial for meeting patient needs.

The growth of biologic drugs, which target specific pathways involved in skin disease progression, has become a major factor driving the prescription segment. These therapies are highly effective in treating conditions like psoriasis and moderate-to-severe atopic dermatitis, where traditional treatments such as topical corticosteroids may not suffice. Prescription dermatological drugs, including potent topical treatments, oral medications, and injectable therapies, are increasingly designed with enhanced formulations for better efficacy and reduced side effects. These innovations are generally available only through prescriptions, making them a dominant force in the market. As Saudi consumers become more aware of skin health and treatment options, they are more likely to seek professional advice from dermatologists. This shift toward seeking professional guidance for more effective treatment has contributed to the growing dominance of the prescription segment. The increasing recognition that skin conditions require medical intervention has further reinforced the reliance on prescription-based products. Rising consumer awareness around the importance of early diagnosis and proactive care has led to more individuals seeking prescription treatments for conditions such as acne and rosacea before they become severe. This trend is especially visible among younger demographics who are keen on addressing skin issues early with professional treatments. These factors are expected to drive the growth of this segment.

Route of Administration Insights

The Topical Administration segment is projected to experience rapid growth during the forecast period. Topical treatments are frequently prescribed for common and chronic dermatological conditions such as acne, eczema, psoriasis, and dermatitis. These conditions are widespread in Saudi Arabia, with many people seeking effective and accessible treatments for everyday skin concerns. Topical drugs like corticosteroids, retinoids, and antifungal creams are effective in managing these conditions, ensuring the dominance of the topical administration category. Topical treatments are highly effective for targeting localized areas of the skin, offering rapid and direct action. This

makes them particularly effective for skin conditions that affect specific regions, such as acne or fungal infections, as patients can apply the product directly where it is needed most, enhancing treatment outcomes.

Topical drugs come in convenient and familiar formats, such as creams, gels, lotions, and sprays, making them easy to apply without requiring professional intervention. The ease of application enhances patient compliance, especially for conditions requiring long-term management, like acne or eczema. Many patients prefer topical treatments over injectable or oral medications due to their non-invasive nature. Since the drugs are applied externally, they are generally less intimidating and more comfortable for patients, particularly for aesthetic or cosmetic treatments. One of the major advantages of topical treatments is that they have minimal systemic absorption, reducing the risk of systemic side effects typically associated with oral or injectable medications. This makes them a safer option for long-term use, particularly in patients with chronic dermatological conditions. Topical drugs allow for direct and localized treatment, which reduces the likelihood of adverse reactions elsewhere in the body. This localized treatment approach is particularly advantageous for managing conditions like psoriasis or dermatitis, where the aim is to treat specific affected areas of the skin without affecting other systems. These factors collectively contribute to the growth of this segment.

Regional Insights

Northern & Central region emerged as the dominant in the Saudi Arabia Dermatological Drugs Market in 2024, holding the largest market share in terms of value. The Central and Northern regions house some of the largest urban centers in Saudi Arabia, including Riyadh, the capital city, and other key urban areas such as Al-Qassim and Hail. Riyadh is the largest city in the country, accounting for a significant portion of the population. As urban centers tend to have higher population densities, the demand for healthcare products including dermatological drugs naturally increases in these regions. The large population in these regions, coupled with high urbanization rates, ensures a continuous and growing demand for dermatological treatments. Urban populations tend to have higher awareness of healthcare needs and are more likely to seek dermatological care for both medical and aesthetic purposes. The Central and Northern regions, particularly Riyadh, are the economic hubs of the country, with higher disposable incomes and a more affluent consumer base. This results in increased spending on healthcare, including both therapeutic and cosmetic dermatological products. People in these regions are more inclined to invest in advanced skincare treatments and medications for conditions such as acne, psoriasis, and eczema.

The Central and Northern regions benefit from the highest concentration of healthcare professionals and dermatologists. Riyadh, as the capital, is home to numerous leading hospitals, specialized dermatology clinics, and research centers, making it the primary destination for people seeking dermatological treatments. This concentration of specialized care increases the demand for dermatological drugs, as patients with chronic or complex skin conditions are more likely to be treated in these regions. These regions also have access to cutting-edge dermatological treatments, including biologics, topical therapies, and aesthetic dermatology treatments. With more dermatologists offering advanced care, there is a stronger reliance on prescription-based dermatological drugs, which further boosts market demand. Healthcare facilities in the Northern and Central regions are often well-equipped with the latest medical technologies and offer a range of dermatological treatments. The advanced infrastructure in these regions supports the introduction of newer dermatological drugs and fosters a high level of patient care, making these regions the key drivers of market growth. The growing awareness of skin health and aesthetics in Saudi Arabia, especially in urban centers like Riyadh, has led to an increase in the demand for cosmetic dermatology. Patients in the Northern and Central regions are particularly inclined to seek treatments for aging, acne scars, pigmentation, and overall skin rejuvenation. This growing demand for aesthetic dermatology fuels the consumption of topical treatments, injectables, and other dermatological products.

Key Market Players

AbbVie Biopharmaceuticals GmbH

Pfizer Scientific Technical Limited Company

Glaxo Saudi Arabia Limited (GSK)

Galderma

Amgen Saudi Arabia Limited

Johnson & Johnson Medical Saudi Arabia Limited

Novartis AG

Eli Lilly and Company

Report Scope:

In this report, the Saudi Arabia Dermatological Drugs Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Saudi Arabia Dermatological Drugs Market, By Therapy:

Acne

Psoriasis

Rosacea

Alopecia

Others

Saudi Arabia Dermatological Drugs Market, By Type:

Prescription

Over the counter (OTC)

Saudi Arabia Dermatological Drugs Market, By Route of Administration:

Topical Administration

Oral Administration

Parenteral Administration

Saudi Arabia Dermatological Drugs Market, By Drug Class:

Corticosteroids

Retinoids

Antibiotics

Antifungals

Calcineurin Inhibitors

Others

Saudi Arabia Dermatological Drugs Market, By Distribution Channel:

Hospital Pharmacies

Retail Pharmacies

Others

Saudi Arabia Dermatological Drugs Market, By Region:

Eastern

Western

Northern & Central

Southern

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Saudi Arabia Dermatological Drugs Market.

Available Customizations:

Saudi Arabia Dermatological Drugs 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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