

Saudi Arabia Dietary Supplements Market By Product Type (Vitamin, Combination Dietary Supplement, Protein, Herbal Supplement, Fish Oil & Omega Fatty Acid, and Others), By Form (Capsules, Tablets, Powder, Soft Gels, Liquid), By Distribution Channel (Pharmacies and Drug Stores, Online, Supermarkets and Hypermarkets, and Others), By Application (Immunity, General Health, Energy & Weight Management, Bone & Joint Health, and Others), By End User (Adults, Geriatric, Pregnant Females, Children, Infants), By Region, Competition, Forecast & Opportunities, 2019-2029F

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Abstracts

Saudi Arabia Dietary Supplements Market was valued at USD 272.09 Million in 2023 and is anticipated to project steady growth in the forecast period with a CAGR of 6.75% through 2029. The Saudi Arabia Dietary Supplements Market is primarily driven by a growing awareness of health and wellness, coupled with rising disposable incomes. As the population becomes increasingly health-conscious, there is a growing demand for dietary supplements to address nutritional deficiencies, support overall health, and prevent chronic diseases. Changing lifestyles, including sedentary habits and unhealthy dietary patterns, are fueling the need for supplementary nutrition. Government initiatives promoting healthy living and preventive healthcare are further driving the market growth. These factors contribute to a burgeoning market for dietary supplements in Saudi Arabia.

Key Market Drivers

Health Consciousness and Awareness

The escalating consciousness surrounding health and wellness within the Saudi Arabian populace emerges as a pivotal force propelling various sectors, particularly the dietary supplements industry. This heightened awareness stems from a multifaceted shift towards prioritizing preventive healthcare measures and addressing lifestyle-related diseases, which have become increasingly prevalent in the country. Individuals are recognizing the significance of proactively managing their health through holistic approaches, including dietary modifications and the integration of supplements into their daily regimen.

In response to the burgeoning emphasis on preventive healthcare, there has been a notable surge in the adoption of dietary supplements among Saudis. These supplements are perceived as essential tools for fortifying overall well-being and bridging nutritional gaps that may arise from dietary deficiencies or lifestyle choices. As individuals strive to optimize their health and vitality, they turn to supplements as convenient and accessible means to complement their existing nutrition and lifestyle practices. The growing prevalence of lifestyle-related diseases, such as obesity, diabetes, and cardiovascular ailments, has heightened concerns regarding health outcomes and spurred proactive measures among the population. Recognizing the potential role of dietary supplements in mitigating health risks and supporting optimal health, individuals are increasingly inclined to incorporate these products into their wellness routines.

Rising Disposable Incomes

As the economic landscape of Saudi Arabia experiences sustained growth and prosperity, marked by rising disposable incomes among its populace, a notable transformation unfolds in the consumer market dynamics, particularly within the healthcare and wellness sectors. With enhanced purchasing power at their disposal, individuals across diverse demographic segments find themselves empowered to allocate a greater portion of their budgets towards enhancing their health and well-being.

This newfound affordability serves as a catalyst for burgeoning demand within the dietary supplements market, as consumers recognize the intrinsic value of investing in

products that offer tangible health benefits. With a growing propensity to prioritize preventive healthcare and holistic wellness practices, individuals are increasingly inclined to incorporate dietary supplements into their daily routines, viewing them as essential components of their health regimens. A study on the prevalence and awareness of dietary supplement use among Saudi women visiting fitness centers in Riyadh, Saudi Arabia, revealed that a significant majority of participants (68.7%) consume dietary supplements. The most commonly used supplements are vitamins (82.8%), followed by amino acids and proteins (30.3%), minerals (22.1%), and fatty acids (3.3%). The availability of disposable income not only amplifies consumer accessibility to dietary supplements but also catalyzes market expansion across various demographic segments. From affluent urbanites to middle-income households and even those in rural areas, the increased affordability of dietary supplements transcends socio-economic boundaries, fostering widespread adoption and consumption.

Urbanization and Changing Lifestyles

Urbanization and the advent of modernization in Saudi Arabia have instigated a significant shift in dietary habits and lifestyles, precipitating a series of consequential changes in the overall health landscape of the populace. As cities expand and urban centers burgeon, traditional dietary practices give way to the adoption of more convenient, albeit often nutritionally deficient, eating patterns.

Sedentary lifestyles have become increasingly prevalent as urbanites grapple with the demands of fast-paced living, characterized by lengthy commutes, desk-bound occupations, and a general lack of physical activity. Coupled with the ubiquity of processed foods, laden with preservatives, additives, and refined sugars, these lifestyle shifts have exacerbated the incidence of nutritional deficiencies among Saudis. In response to these evolving dietary trends and their deleterious effects on health, individuals are increasingly turning to dietary supplements as a means of mitigating nutritional gaps and maintaining optimal well-being. Recognizing the inadequacy of their diets in providing essential nutrients, Saudis are seeking supplementation to fortify their nutritional intake and safeguard their health against the detrimental effects of modern lifestyles. It was reported that approximately 63% of participants did not alter their consumption patterns during the pandemic in the country. Meanwhile, 16% increased their intake, and 21.4% decreased their use of supplements. The most commonly used supplements were iron, calcium (especially among pregnant women), omega-3 (particularly in individuals over 65 years old), and vitamin D.

Aging Population

The demographic landscape of Saudi Arabia is undergoing a notable transformation characterized by the aging of its population, a phenomenon fueled by advancements in healthcare, improved living conditions, and increased life expectancy. As the number of older adults in the kingdom continues to rise (By 2050, individuals aged 60 and over are projected to constitute 25% of Saudi Arabia's total population of 40 million. Additionally, the number of people aged 80 and above is expected to reach 1.6 million, representing 4% of the total population), so does the prevalence of age-related health concerns, which pose significant challenges to the well-being of this demographic segment.

Among the most pressing health issues faced by older adults are those pertaining to bone health, joint pain, and cognitive decline, which can significantly impact their quality of life and independence. Conditions such as osteoporosis, arthritis, and dementia are becoming increasingly prevalent as the population ages, necessitating proactive measures to mitigate their adverse effects. In Saudi Arabia, the prevalence of osteoporosis is recorded at 28.2% in women and 37.8% in men over the age of 50. Additionally, recent studies indicate that the incidence of knee osteoarthritis increases with age, affecting 60.6% of individuals aged 66–75 years compared to 30.8% of those aged 46–55 years.

In response to these age-related health concerns, there has been a notable uptick in the demand for dietary supplements tailored to address the specific needs of older adults. Supplements targeting bone health, such as calcium and vitamin D, play a crucial role in supporting bone density and strength, thereby reducing the risk of fractures and osteoporosis. Similarly, supplements containing omega-3 fatty acids, renowned for their anti-inflammatory properties, are sought after for their potential to alleviate joint pain and stiffness associated with arthritis.

Key Market Challenges

Regulatory Compliance and Quality Assurance

One of the primary challenges facing the Saudi Arabia Dietary Supplements Market is ensuring compliance with stringent regulatory requirements and maintaining high standards of quality assurance. The Saudi Food and Drug Authority (SFDA) regulates the import, manufacture, and distribution of dietary supplements, imposing rigorous standards to ensure product safety, efficacy, and labeling accuracy. Navigating the

complex regulatory landscape, obtaining necessary certifications, and adhering to evolving regulatory frameworks can pose significant hurdles for market players, particularly smaller businesses and new entrants. Ensuring consistent quality control throughout the supply chain, including sourcing raw materials, manufacturing processes, and distribution channels, presents ongoing challenges for industry stakeholders.

Market Fragmentation and Competition

The Saudi Arabia Dietary Supplements Market is characterized by a high degree of fragmentation and intense competition, with numerous domestic and international players vying for market share. This competitive landscape poses challenges for companies in terms of differentiation, brand positioning, and market penetration strategies. Established brands with extensive marketing budgets and distribution networks often dominate the market, making it difficult for smaller players to gain traction and establish a foothold. Counterfeit products, unauthorized imports, and substandard supplements further exacerbate market fragmentation and undermine consumer confidence, necessitating robust enforcement measures and heightened vigilance from regulatory authorities.

Key Market Trends

Prevalence of Lifestyle-related Diseases

The escalating prevalence of lifestyle-related diseases, including obesity, diabetes, and cardiovascular ailments, has emerged as a pressing public health concern in Saudi Arabia, prompting a paradigm shift in healthcare priorities and driving heightened awareness about the pivotal role of nutrition and dietary supplementation in disease prevention and management. As the kingdom grapples with the health implications of modern lifestyles characterized by sedentary behaviors, poor dietary choices, and stress-inducing environments, there has been a growing recognition of the need for proactive interventions to mitigate the escalating burden of chronic diseases.

In response to this imperative, there has been a notable surge in demand for dietary supplements targeting specific health conditions prevalent in Saudi Arabia. Among these, diabetic-friendly supplements and cholesterol-lowering supplements have witnessed particularly robust demand, reflecting the acute need for adjunctive therapies to support disease management and promote optimal health outcomes among affected individuals.

Government Initiatives Promoting Health and Wellness

The Saudi Arabian government has undertaken proactive measures to address the burgeoning challenges posed by lifestyle-related diseases and to foster a culture of health and wellness among its populace. Through a series of concerted initiatives and campaigns, the government has prioritized public health and advocated for healthier lifestyles, with a particular emphasis on promoting balanced nutrition and preventive healthcare practices.

Central to the government's efforts are extensive campaigns aimed at raising awareness about the importance of dietary habits and nutritional intake in mitigating the risk of chronic diseases. These campaigns, often disseminated through various media channels and public platforms, serve to educate the population about the significance of dietary supplements as complementary tools in fulfilling nutritional needs and fortifying overall health. By spotlighting the pivotal role of dietary supplements in preventive healthcare, the government endeavors to empower individuals to take proactive steps towards optimizing their health and well-being. Through targeted messaging and educational outreach, citizens are encouraged to incorporate dietary supplements into their daily routines as part of a holistic approach to wellness.

Segmental Insights

Product Type Insights

Based on the Product Type, in the Saudi Arabia Dietary Supplements Market, vitamins stand out as the dominant category, commanding a significant share of consumer preference and market revenue. Vitamins play a crucial role in supporting various physiological functions, including immune health, energy metabolism, and overall well-being, making them indispensable components of daily supplementation regimens for many individuals. With growing awareness of the importance of nutritional supplementation in maintaining optimal health and preventing deficiencies, the demand for vitamin supplements continues to soar across diverse demographic segments. The availability of a wide range of vitamin formulations catering to specific health needs, such as vitamin D for bone health or vitamin C for immune support, further fuels their popularity among consumers. While other categories such as combination dietary supplements, protein powders, herbal supplements, fish oil, and omega fatty acids also hold significance in the market, it is the ubiquity and essential nature of vitamins that underpin their dominance in the Saudi Arabian dietary supplements landscape.

Form Insights

Based on the Form, in the Saudi Arabia Dietary Supplements Market, capsules emerge as the dominant form of supplementation, capturing a substantial share of consumer preference and market revenue. Capsules offer several advantages that resonate with consumers, including ease of consumption, convenient dosing, and superior stability of active ingredients. These encapsulated formulations are preferred by many individuals due to their ease of swallowing, especially for those who may have difficulty with larger tablets or dislike the taste of powders. Capsules are known for their versatility, allowing for the encapsulation of a wide range of ingredients, including vitamins, minerals, botanical extracts, and specialized formulations. While other forms such as tablets, powders, soft gels, and liquid supplements also hold significance in the market, it is the convenience, efficacy, and broad applicability of capsules that contribute to their dominance in the Saudi Arabian dietary supplements landscape.

Regional Insights

In the Saudi Arabia Dietary Supplements Market, the Central region emerges as the dominant force, wielding considerable influence over market dynamics and revenue generation. The Central region encompasses major urban centers such as Riyadh, the capital city, and the surrounding metropolitan areas, which serve as economic, cultural, and commercial hubs of the kingdom. This region boasts a dense population, characterized by a diverse demographic mix ranging from affluent urbanites to middle-income households, as well as a burgeoning expatriate community.

Several factors contribute to the dominance of the Central region in the Saudi Arabian dietary supplements market. Riyadh, as the capital city and a key economic center, houses a significant concentration of healthcare facilities, including hospitals, clinics, and pharmacies, which serve as vital distribution channels for dietary supplements. The presence of renowned medical institutions, healthcare professionals, and specialty clinics further amplifies demand for dietary supplements among residents seeking preventive healthcare and wellness solutions. The Central region is characterized by higher levels of disposable income and purchasing power compared to other parts of the kingdom, owing to its status as an economic powerhouse and center of commerce and industry. As a result, consumers in this region exhibit greater willingness and ability to invest in health and wellness products, including dietary supplements, as part of their proactive approach to personal well-being.

Key Market Players

%II%Pfizer Saudi Limited Corporate

%II%Abbott Saudi Arabia Trading Llc

%II%Bayer Saudi Arabia LLC

%II%Nestl? Saudi Arabia LLC

%II%GSK Saudi Arabia

%II%Sewar

%II%Dr Nutrition Saudi Arabia

%II%JNK Nutrition KSA

%II%Dallah Pharma

%II%Bashir Shakib Al-Jabri & Co. Ltd.

Report Scope:

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

%II%Saudi Arabia Dietary Supplements Market, By Product Type:

Vitamin

Combination Dietary Supplement

Protein

Herbal Supplement

Fish Oil & Omega Fatty Acid

Others

%II%Saudi Arabia Dietary Supplements Market, By Form:

Capsules

Tablets

Powder

Soft Gels

Liquid

%II%Saudi Arabia Dietary Supplements Market, By Distribution Channel:

Pharmacies and Drug Stores

Online

Supermarkets and Hypermarkets

Others

%II%Saudi Arabia Dietary Supplements Market, By Application:

Immunity

General Health

Energy & Weight Management

Bone & Joint Health

Others

%II%Saudi Arabia Dietary Supplements Market, By End User:

Adults

Geriatric

Pregnant Females

Children

Infants

%II%Saudi Arabia Dietary Supplements Market, By Region:

Western Region

Central Region

Southern Region

Eastern Region

Northern Region

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Saudi Arabia Dietary Supplements Market.

Available Customizations:

Saudi Arabia Dietary Supplements 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

%II%Detailed analysis and profiling of additional market players (up t%II%five).

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