

Saudi Arabia Topical Drugs Market, By Route of Administration (Dermal Drug Delivery, Ophthalmic Drug Delivery, Rectal Drug Delivery, Vaginal Drug Delivery, Nasal Drug Delivery), By Type (Semi-solid Formulations, Liquid Formulations, Solid Formulations, Transdermal Products), By End User (Home Care Settings, Hospitals & Clinics, Burn Centers, Other), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

Saudi Arabia Topical Drugs Market was valued at USD 850.82 Million in 2024 and is anticipated to project robust growth in the forecast period with a CAGR of 4.75% through 2030. A large segment of the Saudi population suffers from skin conditions such as acne, eczema, psoriasis, and dermatitis, leading to a heightened demand for effective topical treatments. The Saudi Food and Drug Authority (SFDA) plays a critical role in regulating pharmaceutical products, ensuring their safety and efficacy through stringent guidelines for the approval and marketing of topical drugs. These regulatory measures significantly impact market dynamics and operational strategies.

Despite the market's growth potential, challenges persist, including regulatory complexities, high research and development costs, and the ongoing issue of counterfeit products. However, there are substantial opportunities for companies to innovate in drug delivery systems, scale up local manufacturing, and tap into the growing demand for natural and clean beauty products.

The Saudi Arabian topical drugs market is poised for expansion, driven by demographic

shifts, technological innovations, and changing consumer preferences. Companies operating within this space are strategically positioned to capitalize on these trends, ensuring sustainable growth and enhanced market penetration.

Key Market Drivers

High Prevalence of Dermatological Disorders

The high prevalence of dermatological disorders in Saudi Arabia plays a pivotal role in driving the growth of the topical drugs market. Saudi Arabia has a significant population affected by dermatological conditions such as acne, eczema, psoriasis, and dermatitis. The growing incidence of these conditions creates a persistent and expanding demand for effective therapeutic solutions. As more individuals seek to manage these disorders, the need for topical treatments—such as creams, ointments, gels, and lotions—rises, directly boosting market growth. The greater the prevalence of these conditions, the higher the consumption of dermatological drugs. With increased awareness about skin health and wellness, patients are becoming more proactive in seeking treatments for dermatological disorders. As a result, there is a growing inclination toward preventive and therapeutic treatments for conditions like acne and eczema, which are prevalent among different age groups in Saudi Arabia. This heightened awareness leads to greater use of dermatological products, which ultimately stimulates demand for topical drug solutions tailored to these conditions. Eczema (3.7%) was the most prevalent cutaneous condition, followed by dermatitis herpetiformis (DH) at 3.4%, and psoriasis at 0.7%. Among the patients, 2.9% exhibited multiple cutaneous manifestations, while 7.8% had other types of skin disorders. In the subset of cutaneous disease (CD) patients with skin conditions, 31.6% had eczema, 22.5% had DH, 5.9% had psoriasis, and 53.3% were diagnosed with other types of skin disorders. Additionally, 157 demographic characteristics were assessed for CD patients across the various skin disorder categories.

Many dermatological disorders, such as psoriasis and atopic dermatitis, are chronic and require long-term management. This chronicity translates into recurring treatment needs, creating a consistent demand for topical drugs. As patients continue to require ongoing care for their skin conditions, it supports sustained market growth, as these conditions necessitate regular use of topical medications to manage flare-ups and maintain skin health. Saudi Arabia's healthcare system is becoming increasingly focused on improving the diagnosis and treatment of skin disorders. The government has placed emphasis on expanding access to dermatological care, which has, in turn, increased the availability and use of effective treatments. Dermatology clinics and

healthcare providers are becoming more prevalent, ensuring that individuals with skin conditions receive timely care and prescriptions for topical treatments. This accessibility drives consistent growth in the market for topical drugs. The harsh desert climate of Saudi Arabia, characterized by extreme heat, sun exposure, and dry conditions, exacerbates dermatological issues such as dry skin, sunburn, and acne. These environmental factors make the population more susceptible to skin disorders, creating an elevated demand for topical treatments designed to protect, hydrate, and heal the skin. As the climate impacts skin health, topical products become an essential part of the daily skincare regimen for many consumers, further stimulating market demand.

A significant portion of the Saudi Arabian population is young, with a substantial percentage of adolescents and young adults experiencing skin conditions such as acne. According to the statistical report from GASTAT, data reveals that individuals aged 15-34 years account for 36.7% of the total Saudi population. Within this demographic, young males in the 20-24-year age group make up 27.6%. Conversely, young females in the age groups of 20-24 years and 25-29 years represent 26.2% of the population. This demographic is not only highly receptive to dermatological products but also more likely to seek out solutions that address cosmetic concerns, such as acne treatments. The demand for acne-related topical drugs, in particular, is driven by this younger segment, which contributes significantly to the market's overall growth. With the increasing awareness of skin health, many consumers in Saudi Arabia are taking a more active role in managing their dermatological conditions. This shift toward self-care has led to a rise in the use of over-the-counter (OTC) topical medications, including those for mild conditions such as dry skin or minor eczema flare-ups. As a result, consumers are seeking more readily available, accessible, and cost-effective topical products, expanding the market to include a wider range of products across different price points and treatment needs. In addition to treating medical dermatological conditions, there is a growing demand for topical products that cater to aesthetic concerns, such as anti-aging, pigmentation correction, and skin rejuvenation. As skin health becomes increasingly tied to cosmetic beauty, consumers are more likely to seek products that not only address functional skin issues but also improve appearance. This dual focus on both medical and cosmetic dermatology further accelerates the demand for topical products in the Saudi Arabian market. The high prevalence of dermatological disorders in Saudi Arabia serves as a key market driver by fostering continuous demand for topical drugs. The combination of a young and health-conscious population, environmental factors, the chronic nature of many skin conditions, and cultural shifts towards self-care all contribute to a growing need for effective topical treatments. As these factors persist, the Saudi Arabian topical drugs market is expected to continue expanding, driven by the ongoing demand for solutions to skin health concerns.

Rising Awareness of Skin Health and Cosmetic Dermatology

Rising awareness of skin health and cosmetic dermatology is a significant driver of growth in the Saudi Arabian topical drugs market, impacting both consumer behavior and industry dynamics in several ways. The increasing focus on maintaining skin health and enhancing appearance through non-invasive treatments directly influences the demand for topical drugs in the region. As awareness of skin health grows, Saudi consumers are becoming more proactive about skincare and skin disease prevention. There is a clear shift toward preventive care, with individuals seeking topical solutions to address common skin issues such as dryness, aging, sun exposure, and acne before they become severe. This growing demand for preventive treatments results in more frequent use of skincare products, especially those that are effective, easy to apply, and provide visible results. Topical drugs, including moisturizers, anti-aging creams, and sun protection products, have become essential parts of daily skincare routines, driving substantial growth in the market. A Saudi Arabian study involving 1,678 participants identified hair removal as the most popular cosmetic procedure, accounting for 26.2%, followed by Botox at 19%. In contrast, our findings showed Botox at 15%. Additionally, the results diverged from a separate Saudi study where the most commonly reported procedures were dermal fillers (43%) and rhinoplasty (42%). These findings also differed from a Jordanian study, where 80.6% of participants opted for Botulinum toxin (BoNT) treatments and dermal fillers. These variations in outcomes could be attributed to differences in social preferences and cultural trends regarding the types of non-surgical facial aesthetic (NSFA) procedures preferred by the populations in each country.

The surge in interest around cosmetic dermatology, including treatments for acne scars, wrinkles, pigmentation, and other aesthetic concerns, has contributed to an uptick in demand for topical treatments. Saudi consumers are increasingly looking for effective ways to address both medical and cosmetic skin issues without resorting to invasive procedures like plastic surgery or injectables. Topical drugs, such as anti-aging creams, skin-lightening agents, and acne treatments, offer consumers a non-invasive option to enhance their appearance and address skin imperfections. This growing interest in enhancing aesthetic appeal, particularly among the younger and middle-aged populations, propels the demand for innovative topical products. In Saudi Arabia, skin health has become an integral part of the broader wellness culture. Skin care is no longer just a cosmetic concern but is now tied to overall well-being. This cultural shift, particularly among the younger generation, reflects a deeper understanding of the importance of skin health as part of a holistic approach to health and beauty. This shift

has led to a growing demand for topical products that not only address dermatological conditions but also enhance the appearance and texture of the skin. As a result, the market for topical skincare products, ranging from moisturizers to targeted treatments, is expanding rapidly.

The rise in skin health awareness can also be attributed to the increasing availability of information through social media, dermatology blogs, and online forums. Influencers, dermatologists, and beauty experts are educating consumers about the importance of using appropriate topical treatments for different skin types and conditions. As consumers become more educated about skin health, they are more likely to seek out dermatologically formulated products that are effective, safe, and tailored to their specific needs. This shift in consumer knowledge leads to increased demand for topical products that are backed by scientific research and are proven to deliver results. As awareness around skin health rises, there is also a heightened demand for products with natural, organic, and clean ingredients. Saudi consumers are increasingly concerned about the ingredients used in the products they apply to their skin, preferring formulations that are free from harmful chemicals, parabens, and synthetic additives. This trend has driven innovation in the topical drugs market, with companies increasingly developing natural and hypoallergenic products to cater to these consumer preferences. Brands that offer transparency in ingredient sourcing and promote sustainable, environmentally friendly practices are gaining traction, further boosting the growth of the market. The growing interest in skin health has led to a boom in the popularity of dermatology clinics in Saudi Arabia, where individuals seek professional guidance for skin concerns. These clinics not only offer medical treatments for conditions like acne or psoriasis but also provide cosmetic dermatology services such as laser therapy, chemical peels, and injectables. This rise in dermatology consultations increases awareness and drives demand for topical products recommended by dermatologists for ongoing skin care post-treatment. As consumers become more reliant on expert advice, there is a greater emphasis on the use of effective topical drugs to complement professional treatments.

Key Market Challenges

Regulatory Challenges and Approval Processes

One of the most significant challenges hindering the growth of the Saudi Arabian topical drugs market is the complex and often time-consuming regulatory environment. The Saudi Food and Drug Authority (SFDA) enforces stringent regulatory frameworks to ensure the safety and efficacy of all pharmaceutical products, including topical drugs.

While these regulations are necessary for consumer protection, they can also result in delays in product approvals, which may limit market access for new and innovative topical drugs.

Companies must navigate a rigorous approval process, which includes extensive clinical trials, documentation, and compliance with local standards, which may vary from international norms. The regulatory environment can be particularly burdensome for international companies attempting to enter the market, requiring them to adapt their formulations or manufacturing processes to meet local requirements. Additionally, the frequent updates and changes in regulations can create uncertainty for businesses, potentially delaying product launches or increasing costs associated with regulatory compliance. This challenge impacts both local and international stakeholders and can deter investment or slow down the introduction of innovative products.

Prevalence of Counterfeit and Substandard Products

The Saudi Arabian market, like many other regions, faces a significant problem with counterfeit drugs, including topical medications. The availability of counterfeit products, which are often cheaper but ineffective or even harmful, is a major concern for the pharmaceutical industry. Counterfeit topical drugs undermine consumer confidence in the market, and pose significant risks to patient safety. They can lead to ineffective treatment, worsening of skin conditions, and even adverse reactions due to unregulated or harmful ingredients.

Despite efforts by the SFDA to regulate and monitor the pharmaceutical supply chain, counterfeit products remain a persistent challenge, particularly in the online and unregulated sectors. Consumers, especially in more remote or underserved areas, may be more susceptible to purchasing counterfeit drugs due to lower prices or the lack of awareness about the risks. This undermines the growth of legitimate brands and creates barriers to market entry for new, reputable companies. As a result, companies must invest heavily in anti-counterfeiting measures, such as enhanced packaging, traceability systems, and consumer education, which can add to operational costs.

Key Market Trends

Advancement in Drug Delivery Systems

One of the most promising trends in the Saudi Arabian topical drugs market is the advancement in drug delivery systems. Innovations in delivery technologies, such as

nano-encapsulation, microneedles, and transdermal patches, are revolutionizing how active ingredients are delivered to the skin. These novel systems enhance the effectiveness, precision, and comfort of topical treatments, offering better penetration and longer-lasting results.

As consumers demand more efficient and effective solutions for skin conditions, the need for advanced drug delivery methods has risen. Nano-encapsulation, for example, allows for better absorption of active ingredients, improving the therapeutic outcomes for chronic skin conditions such as psoriasis and eczema. Similarly, transdermal patches can provide continuous drug release, ensuring a steady dosage and minimizing the inconvenience of frequent application. These advancements not only enhance the performance of topical drugs but also present new business opportunities for companies to differentiate their products in a competitive market.

The rise of personalized medicine is expected to complement these advancements, with drug delivery systems becoming more tailored to individual skin types and needs. This trend is likely to encourage the development of highly specialized topical products, which can further drive market growth and foster consumer loyalty.

Increased Focus on Natural and Organic Ingredients

Another significant trend driving the future growth of the Saudi Arabian topical drugs market is the growing demand for products formulated with natural and organic ingredients. As consumers become more conscious of the ingredients in their skincare products, there is a marked shift toward formulations that are perceived as safer, more sustainable, and gentler on the skin. This trend is particularly evident in the skincare and cosmetic dermatology sectors, where there is a rising preference for products containing botanical extracts, essential oils, and naturally derived compounds.

The demand for clean beauty products is being fueled by an increasing awareness of the potential harm caused by synthetic chemicals, preservatives, and additives commonly found in conventional skincare products. In Saudi Arabia, this trend aligns with the cultural emphasis on natural wellness and holistic health, encouraging consumers to seek out products that offer both beauty benefits and skin health advantages without the use of harsh chemicals. Topical drugs that incorporate organic ingredients such as aloe vera, argan oil, tea tree oil, and hyaluronic acid are gaining popularity, particularly among health-conscious and environmentally aware consumers.

The focus on natural ingredients also offers manufacturers the opportunity to position

their products as premium offerings, allowing for higher margins and differentiation in the marketplace. Companies that can leverage clean, sustainable sourcing practices while ensuring high efficacy are well-positioned to capitalize on this growing demand for organic skincare solutions.

Segmental Insights

Type Insights

Based on the category of Type, the Semi-solid Formulations segment emerged as the dominant in the Saudi Arabia Topical Drugs market in 2024. The primary reasons for the dominance of semi-solid formulations in Saudi Arabia is their ability to address a wide spectrum of dermatological conditions. Whether treating acute issues such as sunburn, rashes, or burns, or chronic skin conditions like psoriasis, eczema, and acne, semi-solid formulations provide an ideal balance between effectiveness and ease of use. Their ability to be applied directly to the affected area ensures targeted therapy, which is crucial for conditions that require localized treatment. Semi-solid formulations also offer versatility in formulation, allowing for the incorporation of both active pharmaceutical ingredients (APIs) and cosmetic agents that cater to various needs, including anti-inflammatory, antifungal, antibacterial, and moisturizing properties. This broad applicability ensures that semi-solid products remain at the forefront of consumer preferences, making them a dominant segment in the market.

The semi-solid nature of creams, gels, and ointments allows for improved efficacy compared to liquid formulations. These formulations are more viscous, enabling them to stay in place longer and provide more extended contact with the skin. This prolonged contact enhances the absorption of active ingredients and promotes more effective delivery of the drug. For example, ointments and creams are particularly well-suited for conditions like dry skin or eczema, where a thicker, occlusive layer is needed to lock in moisture and prevent further irritation. Furthermore, semi-solid formulations allow for the controlled release of active ingredients, ensuring that the medication is released gradually over time, reducing the need for frequent reapplication. This feature is especially important for chronic conditions that require long-term management, such as acne or inflammatory skin diseases. As such, patients benefit from a continuous therapeutic effect without the inconvenience of constant reapplication, which boosts consumer satisfaction and encourages repeated usage. Semi-solid formulations are widely preferred by consumers due to their ease of use and the comfort they provide during application. Products like creams, lotions, and gels have a smooth, non-greasy texture that is easy to apply and absorb, making them more appealing compared to

other dosage forms. This is particularly important in Saudi Arabia, where the hot climate can make the application of topical products feel uncomfortable if they are overly thick or sticky. The ability to quickly apply a thin layer of semi-solid formulation to the affected area without leaving a greasy residue or heavy feeling is a key factor in their dominance. Furthermore, these formulations often come in convenient packaging formats such as tubes, jars, or pump bottles, making them easy to store, use, and carry. These practical advantages contribute to the widespread consumer preference for semi-solid formulations over other types of topical drugs. These factors are expected to drive the growth of this segment.

Route of Administration Insights

The Dermal Drug Delivery segment is projected to experience rapid growth during the forecast period. The dermal drug delivery system is widely regarded for its ability to deliver active pharmaceutical ingredients (APIs) directly to the affected area, allowing for highly localized treatment. This is particularly crucial in treating skin conditions like acne, eczema, psoriasis, and fungal infections, where precise targeting of the therapeutic agent enhances efficacy. Unlike oral medications, which may take longer to have an effect due to the systemic absorption and distribution of the drug, dermal delivery ensures a higher concentration of the drug at the site of action. This direct approach minimizes the systemic side effects that can be associated with oral or injectable medications, making dermal delivery a preferred method for treating chronic dermatological conditions. It also offers quicker relief for acute conditions, as patients can experience the benefits of the medication within a short period following application. This precision-driven mechanism of action has led to a growing preference for dermal drug delivery systems, further driving the segment's dominance in the Saudi Arabian market.

The increasing prevalence of both chronic dermatological disorders (e.g., psoriasis, eczema, rosacea) and aesthetic skin concerns (e.g., acne scars, pigmentation, aging signs) in Saudi Arabia has significantly contributed to the rise of dermal drug delivery products. With a high incidence of skin conditions among the population, particularly those linked to environmental factors like high temperatures and sun exposure, dermal delivery offers a specialized solution to address these concerns. Products such as topical corticosteroids, retinoids, and moisturizing agents have become staple treatments in managing these disorders. Moreover, the demand for dermatological and aesthetic treatments is growing as consumers increasingly seek solutions for skin health, including anti-aging and skin-rejuvenating products. Dermal drug delivery systems, which include formulations such as creams, gels, and ointments, are at the

forefront of this trend. For example, the use of topical retinoid creams or sunscreens directly on the skin allows for targeted treatment of wrinkles, fine lines, and other aging signs, meeting both cosmetic and therapeutic needs. The ability of dermal delivery systems to address a wide range of dermatological and aesthetic concerns has positioned them as the dominant category within the topical drugs market. These factors collectively contribute to the growth of this segment.

Regional Insights

Northern & Central region emerged as the dominant in the Saudi Arabia Topical Drugs market in 2024, holding the largest market share in terms of value. The Northern and Central Regions of Saudi Arabia, particularly cities like Riyadh, Al-Qassim, and Hail, are home to a large proportion of the country's population. Riyadh, the capital city, is the most populous region, with a significant urban population that has a higher disposable income and greater access to healthcare services. A larger, more diverse population in these areas leads to an increased demand for a wide range of topical drugs, from dermatological treatments for conditions like acne and psoriasis to cosmetic products like anti-aging creams and sunscreens. This high population density directly correlates with the volume of healthcare needs and consumer demand for pharmaceutical products. The density of the population in these urban and semi-urban regions drives the growth of local pharmacies, hospitals, and clinics, all of which stock a wide range of topical medications. This creates a large, consistent market for topical drugs, making the Northern and Central regions the largest contributors to overall market sales.

The Northern and Central Regions, particularly Riyadh, benefit from superior healthcare infrastructure, which includes state-of-the-art hospitals, specialized dermatology clinics, and pharmacies equipped with the latest treatments. The presence of advanced healthcare facilities not only facilitates the diagnosis and treatment of skin conditions but also increases consumer awareness of available topical treatments. The region's healthcare institutions, often staffed by internationally trained professionals, provide both medical and cosmetic dermatology services, increasing the need for specialized topical drugs. Patients seeking treatment for conditions such as acne, eczema, and other dermatological disorders are more likely to be prescribed effective topical medications, contributing to the growth of the market in these regions. Furthermore, the high number of medical and cosmetic dermatologists in urban areas ensures that consumers have easy access to professional advice and prescription-based topical drugs. With a well-developed healthcare system and a network of private and public healthcare providers, these regions benefit from greater patient compliance, higher adoption rates for dermatological treatments, and an overall increase in the demand for

topical drugs.

Key Market Players

Bayer Middle East FZE

Cipla

Glaxo Saudi Arabia Limited (GSK)

Johnson & Johnson Medical Saudi Arabia Limited

Novartis AG

Hisamitsu Pharmaceutical Co.Inc.

Merck Limited

GLENMARK PHARMACEUTICALS LTD

Report Scope:

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

Saudi Arabia Topical Drugs Market, By Product:

Dermal Drug Delivery

Ophthalmic Drug Delivery

Rectal Drug Delivery

Vaginal Drug Delivery

Nasal Drug Delivery

Saudi Arabia Topical Drugs Market, By Type:

Semi-solid Formulations

Liquid Formulations

Solid Formulations

Transdermal Products

Saudi Arabia Topical Drugs Market, By End User:

Home Care Settings

Hospitals & Clinics

Burn Centers

Other

Saudi Arabia Topical Drugs Market, By Region:

Eastern

Western

Northern & Central

Southern

Competitive Landscape

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

Available Customizations:

Saudi Arabia Topical Drugs market report with the given market data, TechSci

Saudi Arabia Topical Drugs Market, By Route of Administration (Dermal Drug Delivery, Ophthalmic Drug Delivery,...

Research offers customizations according to a company's specific needs. The following customization options are available for the report:

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

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