



Consumer Health in the United Arab Emirates

September 2025

Table of Contents

Consumer Health in the United Arab Emirates

EXECUTIVE SUMMARY

Consumer Health in 2025: The big picture

Key trends in 2025

Competitive landscape

Channel developments

What next for Consumer Health?

MARKET INDICATORS

Table 1 - Consumer Expenditure on Health Goods and Medical Services: Value 2020-2025

Table 2 - Life Expectancy at Birth 2020-2025

MARKET DATA

Table 3 - Sales of Consumer Health by Category: Value 2020-2025

Table 4 - Sales of Consumer Health by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Consumer Health: % Value 2021-2025

Table 6 - LBN Brand Shares of Consumer Health: % Value 2022-2025

Table 7 - Penetration of Private Label in Consumer Health by Category: % Value 2020-2025

Table 8 - Distribution of Consumer Health by Format: % Value 2020-2025

Table 9 - Distribution of Consumer Health by Format and Category: % Value 2025

Table 10 - Forecast Sales of Consumer Health by Category: Value 2025-2030

Table 11 - Forecast Sales of Consumer Health by Category: % Value Growth 2025-2030

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

Analgesics in the United Arab Emirates

KEY DATA FINDINGS

2025 DEVELOPMENTS

Wider use boosts analgesics

Panadol consolidates its clear leadership of analgesics

Pharmacies lead but there is a wide choice of channels for consumers of analgesics

PROSPECTS AND OPPORTUNITIES

Rising incidence of back pain to stimulate use of analgesics

Strong advances in consumer health to bring benefits for analgesics

Search for better understanding of pain relief

CATEGORY DATA

Table 12 - Sales of Analgesics by Category: Value 2020-2025

Table 13 - Sales of Analgesics by Category: % Value Growth 2020-2025

Table 14 - NBO Company Shares of Analgesics: % Value 2021-2025

Table 15 - LBN Brand Shares of Analgesics: % Value 2022-2025

Table 16 - Forecast Sales of Analgesics by Category: Value 2025-2030

Table 17 - Forecast Sales of Analgesics by Category: % Value Growth 2025-2030

Sleep Aids in the United Arab Emirates

KEY DATA FINDINGS

2025 DEVELOPMENTS

Growth rates slow as consumers look to more natural and lifestyle alternatives

Panadol Night is a dynamic presence in sleep aids

High accessibility and expertise help pharmacies to dominate the competitive landscape

PROSPECTS AND OPPORTUNITIES

Robust growth opportunities despite a more holistic approach to sleep health

Digital sleep trackers offer a potential growth area

Health and wellness trend to support a shift to herbal sleep remedies

CATEGORY DATA

Table 18 - Sales of Sleep Aids: Value 2020-2025

Table 19 - Sales of Sleep Aids: % Value Growth 2020-2025

Table 20 - NBO Company Shares of Sleep Aids: % Value 2021-2025

Table 21 - LBN Brand Shares of Sleep Aids: % Value 2022-2025

Table 22 - Forecast Sales of Sleep Aids: Value 2025-2030

Table 23 - Forecast Sales of Sleep Aids: % Value Growth 2025-2030

Cough, Cold and Allergy (Hay Fever) Remedies in the United Arab Emirates

KEY DATA FINDINGS

2025 DEVELOPMENTS

Surge in seasonal illnesses and air pollution spur demand

GSK Consumer Healthcare leverages a wide, strong and trusted portfolio

Pharmacies retain strong trust among consumers

PROSPECTS AND OPPORTUNITIES

Robust demand for cough, cold and allergy (hay fever) remedies

Growing awareness of symptoms to improve solutions

Room for development and growth in paediatric solutions

CATEGORY DATA

Table 24 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2020-2025

Table 25 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2020-2025

Table 26 - NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2021-2025

Table 27 - LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2022-2025

Table 28 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2025-2030

Table 29 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2025-2030

Dermatologicals in the United Arab Emirates

KEY DATA FINDINGS

2025 DEVELOPMENTS

Growing health and product awareness stimulates retail value growth across dermatologicals

Bayer Middle East benefits from a key brand in fast-growing categories

Blurred lines favour pharmacies

PROSPECTS AND OPPORTUNITIES

Dermatologicals to benefit from growing awareness of how the climate and lifestyles impact skin health and wellbeing

Skin care focus pushes the use of dermatologicals

Hair loss to remain a key issue

CATEGORY DATA

Table 30 - Sales of Dermatologicals by Category: Value 2020-2025

Table 31 - Sales of Dermatologicals by Category: % Value Growth 2020-2025

Table 32 - NBO Company Shares of Dermatologicals: % Value 2021-2025

Table 33 - LBN Brand Shares of Dermatologicals: % Value 2022-2025

Table 34 - LBN Brand Shares of Hair Loss Treatments: % Value 2022-2025

Table 35 - Forecast Sales of Dermatologicals by Category: Value 2025-2030

Table 36 - Forecast Sales of Dermatologicals by Category: % Value Growth 2025-2030

Digestive Remedies in the United Arab Emirates

KEY DATA FINDINGS

2025 DEVELOPMENTS

Stress and gut health issues push the use of IBS treatments and digestive enzymes

The competitive landscape remains highly fragmented

Consumers place their trust in pharmacists for solutions to digestive problems

PROSPECTS AND OPPORTUNITIES

Rising IBS rates to increase the use of specialised solutions

Meeting the needs of young adults and women offers innovation and growth opportunities

Players to respond to consumers' longer-term approach to digestive health

CATEGORY DATA

Table 37 - Sales of Digestive Remedies by Category: Value 2020-2025

Table 38 - Sales of Digestive Remedies by Category: % Value Growth 2020-2025

Table 39 - NBO Company Shares of Digestive Remedies: % Value 2021-2025

Table 40 - LBN Brand Shares of Digestive Remedies: % Value 2022-2025

Table 41 - Forecast Sales of Digestive Remedies by Category: Value 2025-2030

Table 42 - Forecast Sales of Digestive Remedies by Category: % Value Growth 2025-2030

Eye Care in the United Arab Emirates

KEY DATA FINDINGS

2025 DEVELOPMENTS

Standard eye care dominates through all-year-round demand

A strong brand offer and wide distribution keep Alcon Middle East (Dubai) at the top of the rankings

Pharmacies adapt to retail trends with online sales platforms

PROSPECTS AND OPPORTUNITIES

Climatic conditions to spur allergy eye care

Preventative eye care approach could limit demand

Eye care to see innovation as players respond to key trends

CATEGORY DATA

Table 43 - Sales of Eye Care by Category: Value 2020-2025

Table 44 - Sales of Eye Care by Category: % Value Growth 2020-2025

Table 45 - NBO Company Shares of Eye Care: % Value 2021-2025

Table 46 - LBN Brand Shares of Eye Care: % Value 2022-2025

Table 47 - Forecast Sales of Eye Care by Category: Value 2025-2030

Table 48 - Forecast Sales of Eye Care by Category: % Value Growth 2025-2030

NRT Smoking Cessation Aids in the United Arab Emirates

KEY DATA FINDINGS

2025 DEVELOPMENTS

Healthier lifestyles spur the use of NRT smoking cessation aids

Consolidated competitive landscape limits the room for a major new arrival

Pharmacies dominates but the distribution landscape expands

PROSPECTS AND OPPORTUNITIES

Sales opportunities as more consumers look to quit smoking

New apps can add dynamism to the category

Tobacco-free nicotine alternatives threaten NRT smoking cessation aids

CATEGORY INDICATORS

Table 49 - Number of Smokers by Gender 2020-2025

CATEGORY DATA

Table 50 - Sales of NRT Smoking Cessation Aids by Category: Value 2020-2025

Table 51 - Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2020-2025

Table 52 - NBO Company Shares of NRT Smoking Cessation Aids: % Value 2021-2025

Table 53 - LBN Brand Shares of NRT Smoking Cessation Aids: % Value 2022-2025

Table 54 - Forecast Sales of NRT Smoking Cessation Aids by Category: Value 2025-2030

Table 55 - Forecast Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2025-2030

Wound Care in the United Arab Emirates

KEY DATA FINDINGS

2025 DEVELOPMENTS

Maturity constrains the growth potential of wound care

Hansaplast continues to shape the category offer

Pharmacies leverage consumer trust to dominate the distribution of wound care

PROSPECTS AND OPPORTUNITIES

Growing self-reliance in health and safety to offer growth opportunities to first aid kits

Room for premium releases, if marketed effectively

Sustainable products are set to emerge more strongly

CATEGORY DATA

Table 56 - Sales of Wound Care by Category: Value 2020-2025

Table 57 - Sales of Wound Care by Category: % Value Growth 2020-2025

Table 58 - NBO Company Shares of Wound Care: % Value 2021-2025

Table 59 - LBN Brand Shares of Wound Care: % Value 2022-2025

Table 60 - Forecast Sales of Wound Care by Category: Value 2025-2030

Table 61 - Forecast Sales of Wound Care by Category: % Value Growth 2025-2030

Sports Nutrition in the United Arab Emirates

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sports protein powder benefits as more women enter the category

Glanbia is a dynamic leader investing in its portfolio, distribution and fitness and community programmes

E-commerce gains from special deal offers

PROSPECTS AND OPPORTUNITIES

Holistic approach incorporating regular exercise to push the demand for sports nutrition

Government intervention to improve population health offers growth opportunities

Bundling to win over consumers

CATEGORY DATA

Table 62 - Sales of Sports Nutrition by Category: Value 2020-2025

Table 63 - Sales of Sports Nutrition by Category: % Value Growth 2020-2025

Table 64 - NBO Company Shares of Sports Nutrition: % Value 2021-2025

Table 65 - LBN Brand Shares of Sports Nutrition: % Value 2022-2025

Table 66 - Forecast Sales of Sports Nutrition by Category: Value 2025-2030

Table 67 - Forecast Sales of Sports Nutrition by Category: % Value Growth 2025-2030

Dietary Supplements in the United Arab Emirates

KEY DATA FINDINGS

2025 DEVELOPMENTS

Consumers are drawn to the convenience and multiple benefits of combination dietary supplements

New entrants fragment the competitive landscape

Pharmacies meet the needs of consumers

PROSPECTS AND OPPORTUNITIES

Diet and lifestyle trends to boost dietary supplements

Players may invest in new formats to lure consumers

Dietary supplements to benefit from the widening scope of health and wellbeing

CATEGORY DATA

Table 68 - Sales of Dietary Supplements by Category: Value 2020-2025

Table 69 - Sales of Dietary Supplements by Category: % Value Growth 2020-2025

Table 70 - Sales of Dietary Supplements by Positioning: % Value 2020-2025

Table 71 - NBO Company Shares of Dietary Supplements: % Value 2021-2025

Table 72 - LBN Brand Shares of Dietary Supplements: % Value 2022-2025

Table 73 - Forecast Sales of Dietary Supplements by Category: Value 2025-2030

Table 74 - Forecast Sales of Dietary Supplements by Category: % Value Growth 2025-2030

Vitamins in the United Arab Emirates

KEY DATA FINDINGS

2025 DEVELOPMENTS

Single vitamins and multivitamins continue to gain momentum

Centrum consolidates leadership but challenges remain on the horizon

E-commerce continues to see growing consumer trust and significant retail value share gains

PROSPECTS AND OPPORTUNITIES

Wellness and beauty to stimulate the demand for vitamins

Subscription models to foster take up

Legislation to increase consumer confidence in vitamins as awareness of alternative sources increases

CATEGORY DATA

Table 75 - Sales of Vitamins by Category: Value 2020-2025

Table 76 - Sales of Vitamins by Category: % Value Growth 2020-2025

Table 77 - Sales of Multivitamins by Positioning: % Value 2020-2025

Table 78 - NBO Company Shares of Vitamins: % Value 2021-2025

Table 79 - LBN Brand Shares of Vitamins: % Value 2022-2025

Table 80 - Forecast Sales of Vitamins by Category: Value 2025-2030

Table 81 - Forecast Sales of Vitamins by Category: % Value Growth 2025-2030

Weight Management and Wellbeing in the United Arab Emirates

KEY DATA FINDINGS

2025 DEVELOPMENTS

Supplement nutrition drinks resonate with consumers' needs

Atkins leverages strong brand equity and a wide-ranging offer to stay ahead of the field

E-commerce develops and grows rapidly in the weight management and wellbeing space

PROSPECTS AND OPPORTUNITIES

Obesity and overweightness concerns to sustain the use of weight management and wellbeing products

Evolution through tools and programmes

Sports nutrition represents a potential threat

CATEGORY DATA

Table 82 - Sales of Weight Management and Wellbeing by Category: Value 2020-2025

Table 83 - Sales of Weight Management and Wellbeing by Category: % Value Growth 2020-2025

Table 84 - NBO Company Shares of Weight Management and Wellbeing: % Value 2021-2025

Table 85 - LBN Brand Shares of Weight Management and Wellbeing: % Value 2022-2025

Table 86 - Forecast Sales of Weight Management and Wellbeing by Category: Value 2025-2030

Table 87 - Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2025-2030

Herbal/Traditional Products in the United Arab Emirates

KEY DATA FINDINGS

2025 DEVELOPMENTS

Preference for quick, effective standard solutions limits growth potential

Tiger Balm remains the leading brand in a highly fragmented competitive landscape

Safety concerns maintain the popularity of pharmacies

PROSPECTS AND OPPORTUNITIES

Maintaining trust is of key importance in the category

Distrust of informal sellers to maintain a preference for established retail channels

DIY trend can threaten purchases of herbal/traditional products

CATEGORY DATA

Table 88 - Sales of Herbal/Traditional Products by Category: Value 2020-2025

Table 89 - Sales of Herbal/Traditional Products by Category: % Value Growth 2020-2025

Table 90 - NBO Company Shares of Herbal/Traditional Products: % Value 2021-2025

Table 91 - LBN Brand Shares of Herbal/Traditional Products: % Value 2022-2025

Table 92 - Forecast Sales of Herbal/Traditional Products by Category: Value 2025-2030

Table 93 - Forecast Sales of Herbal/Traditional Products by Category: % Value Growth 2025-2030

Paediatric Consumer Health in the United Arab Emirates

KEY DATA FINDINGS

2025 DEVELOPMENTS

Proactive paediatric care and demographic trends boost the use of nappy (diaper) rash treatments

Sudocrem is a versatile and trusted households essential

Pharmacies tick access and trust boxes with parents

PROSPECTS AND OPPORTUNITIES

Positive growth projection in a category characterised by transience

Innovative format to add dynamism to paediatric dietary supplements

State and community initiatives and technological trends to stimulate paediatric consumer health

CATEGORY DATA

Table 94 - Sales of Paediatric Consumer Health by Category: Value 2020-2025

Table 95 - Sales of Paediatric Consumer Health by Category: % Value Growth 2020-2025

Table 96 - NBO Company Shares of Paediatric Consumer Health: % Value 2021-2025

Table 97 - LBN Brand Shares of Paediatric Consumer Health: % Value 2022-2025

Table 98 - Forecast Sales of Paediatric Consumer Health by Category: Value 2025-2030

Table 99 - Forecast Sales of Paediatric Consumer Health by Category: % Value Growth 2025-2030

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-the-united-arab-emirates/report.