



The poster is for the 155th Marketing Club event. It features a dark blue background with orange and white text. On the left is a portrait of Dr. Mahmoud Bahgat, and on the right is a photo of Dr. Haytham Maraie. The central text reads 'MARKETING Club 155th' in large letters, followed by 'Future & Emerging Trends in Mena' and 'Exploring the Dynamics'. Below this, it says 'LIVE WEBINAR' with a play button icon and 'JOIN FREE'. A table at the bottom provides the date, time, and location. In the top right corner, it lists the club's locations: 155th Marketing Club, 111st Business Club, and 2nd Jordon Club.

MARKETING Club 155th

Future & Emerging Trends in Mena
Exploring the Dynamics

JOIN FREE
LIVE WEBINAR

Date	Time	Time	Time	Place
17-9-24	10 pm	KSA & Egypt		Online Zoom
Tuesday				

CLUB FOUNDER, HOST
DR. MAHMOUD BAHGAT
LEGENDARY DIRECTOR

Instructor
Dr. Haytham Maraie
Marketing Director

155th Marketing Club
111st Business Club
2nd Jordon Club

Welcome to
Marketing
Club

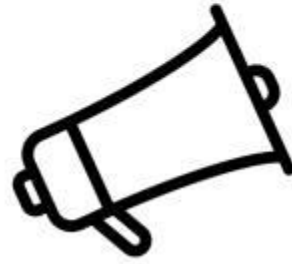








DISCLAIMER

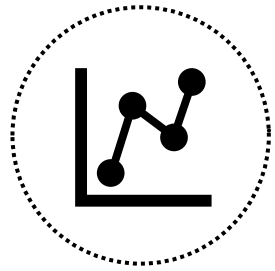




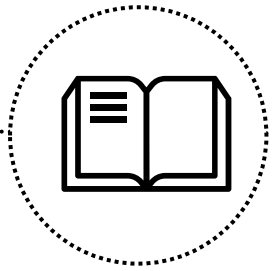
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1100	1.000	1100	18%
400	0.0%	23.0	28%
1946	3.7%	10%	10%
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Future and Emerging Trend in MENA

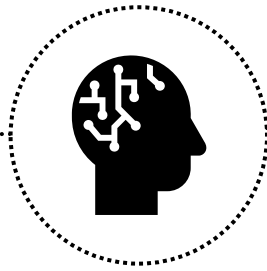
Our Agenda today



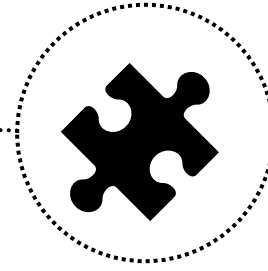
MENA
Facts



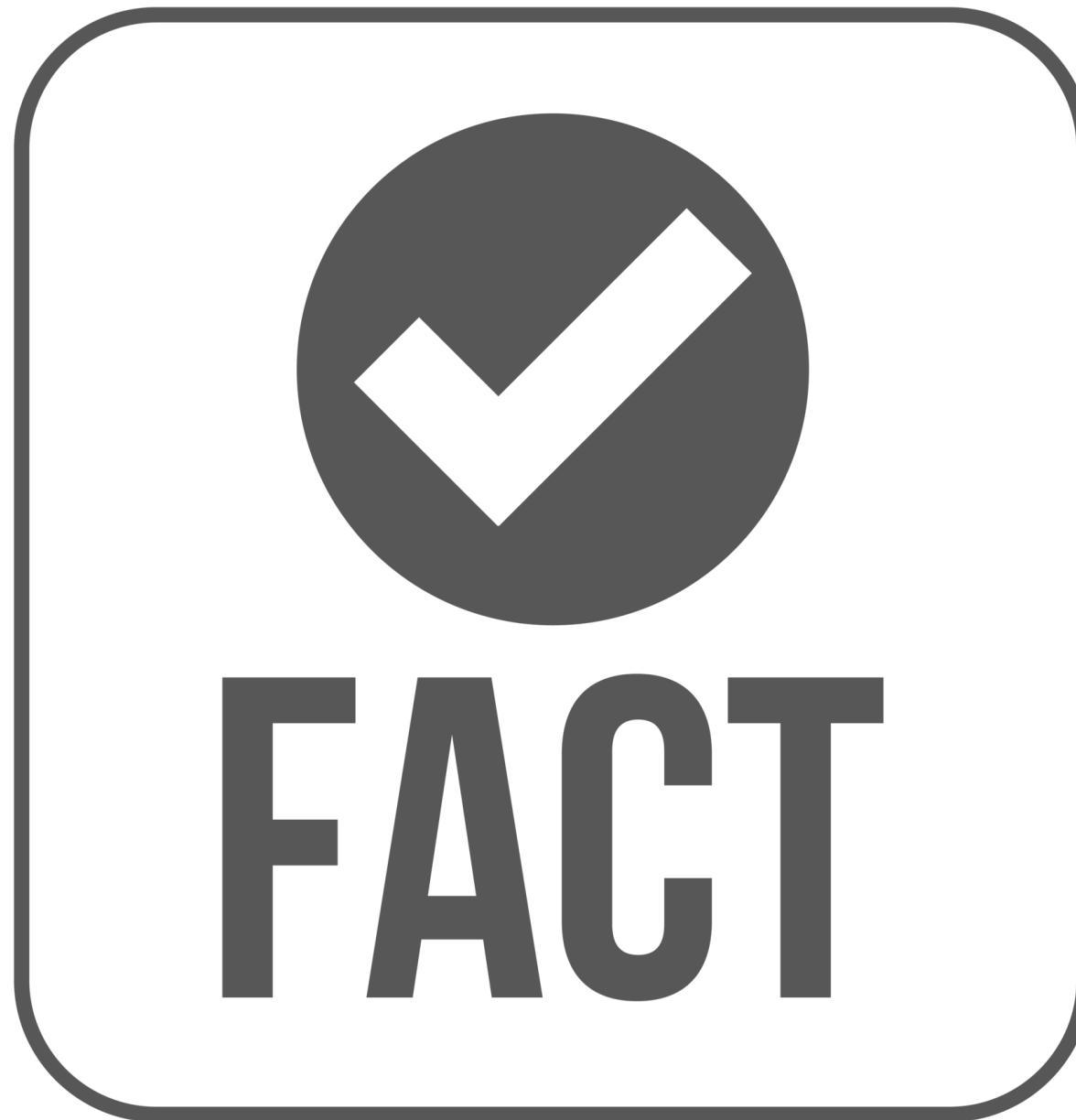
Emerging
Trends



Future
Impact

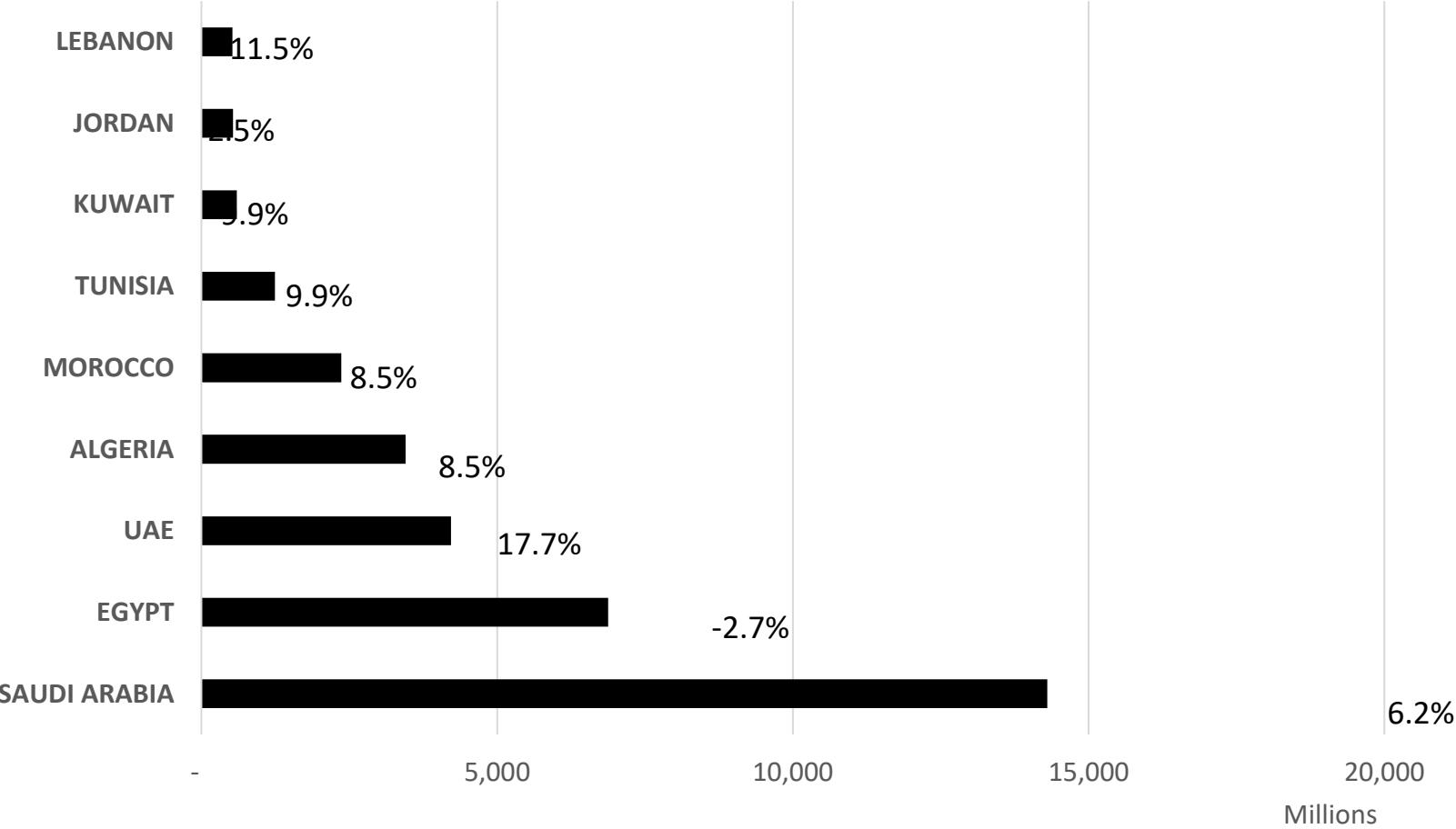


Q&A



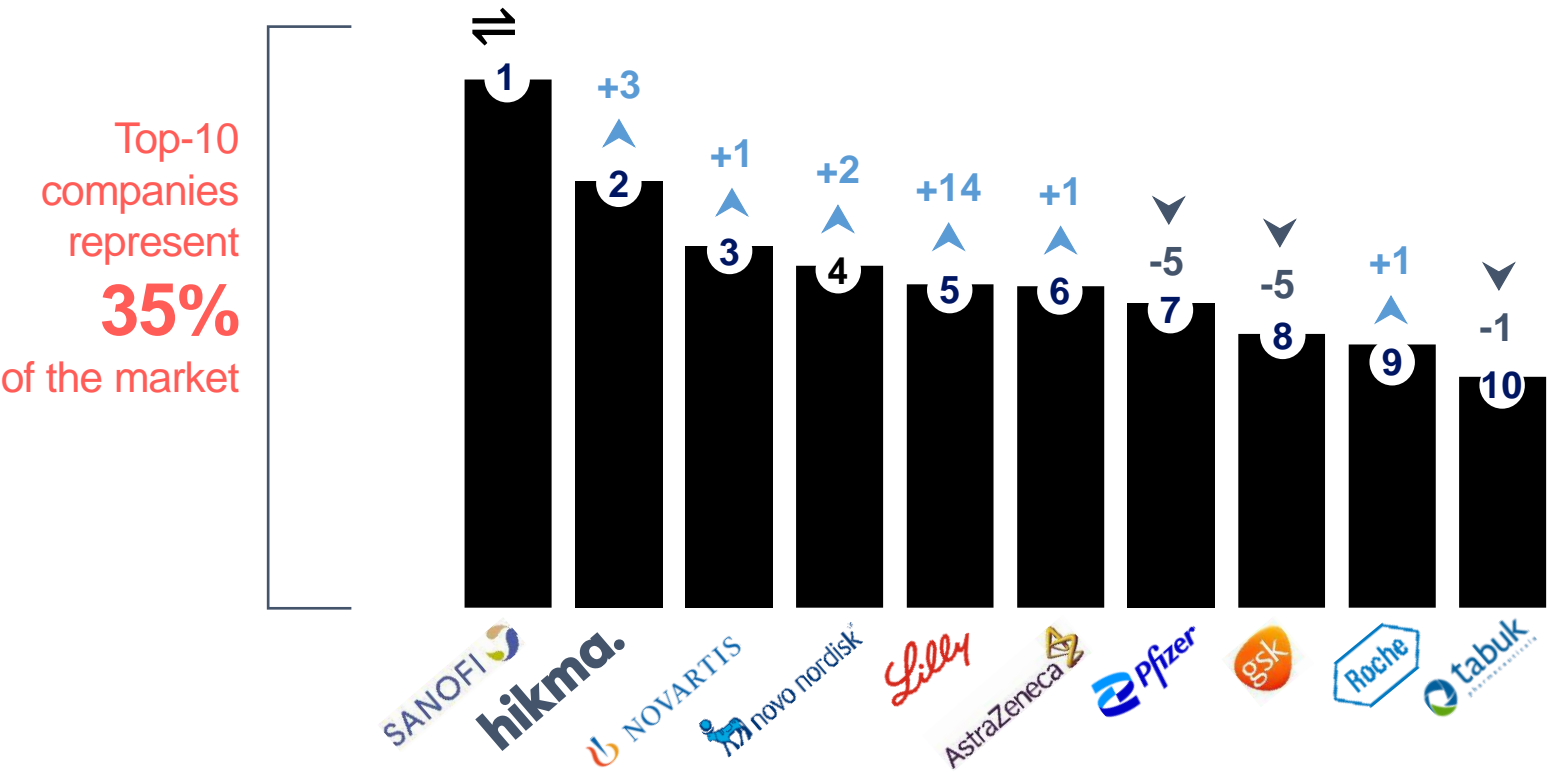
MENA Pharma Market per Country

MENA growing by 6.1% MAT July and YTD 8.1%



MENA Pharmaceutical Market

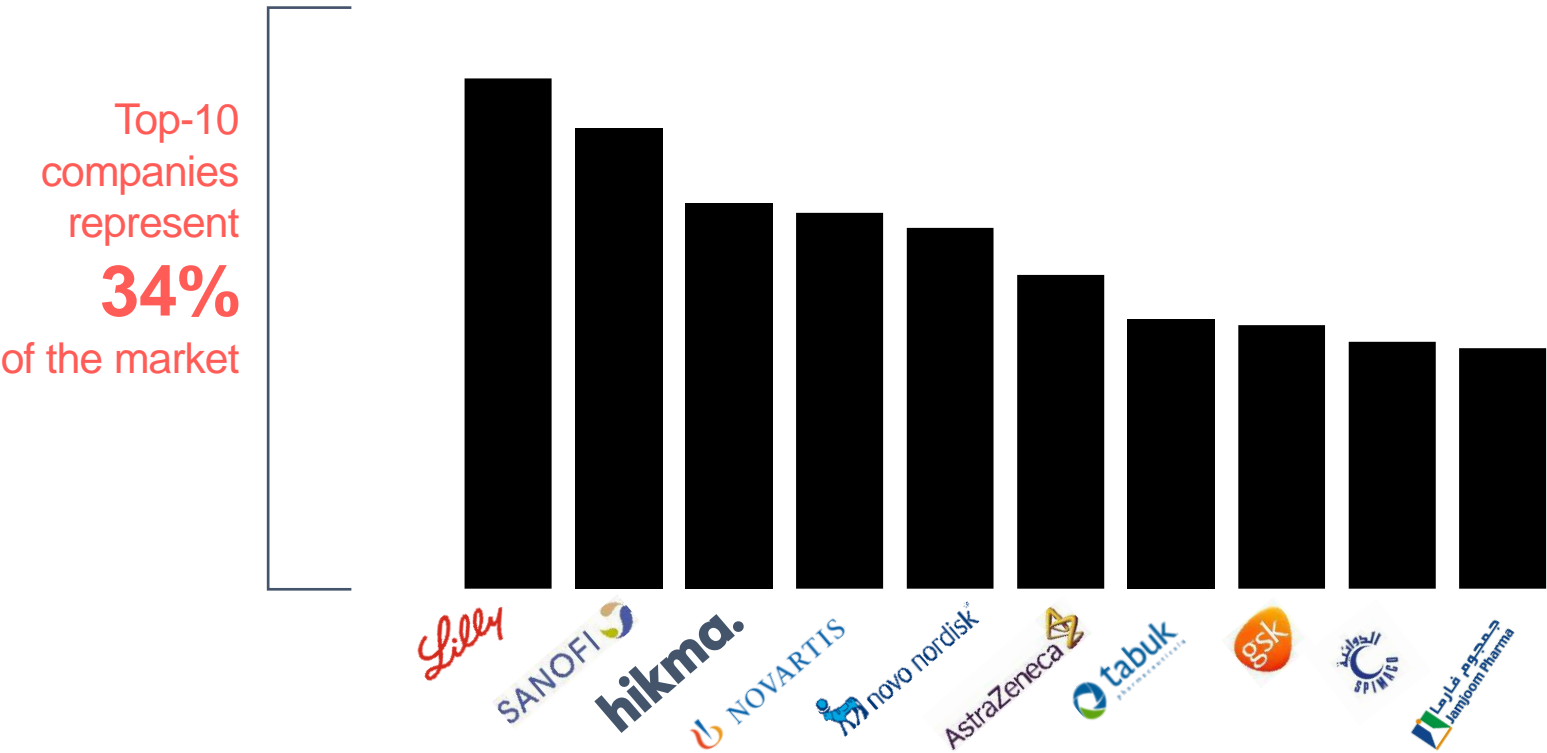
MENA top-10 pharmaceutical companies by sales



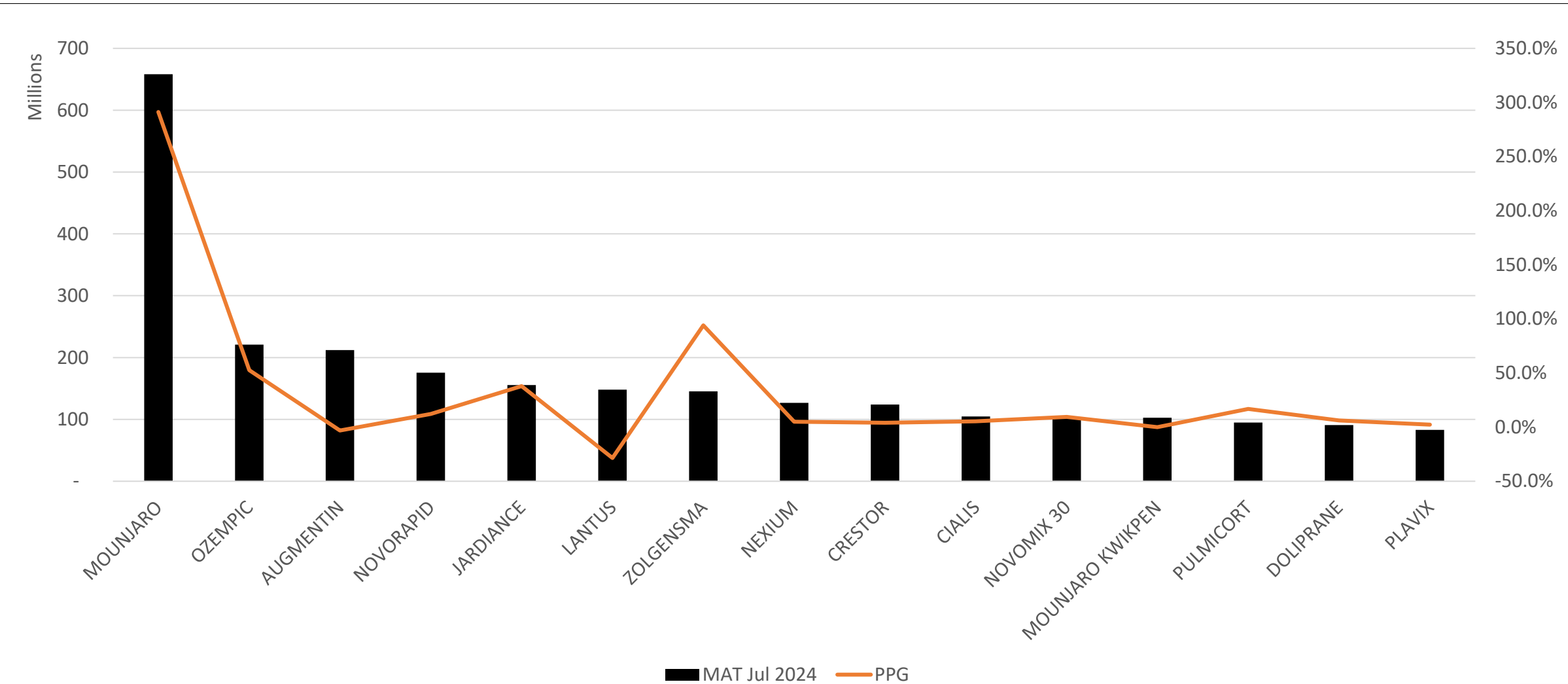
MENA Pharmaceutical Market

YTD JUL-24 PVT Market. Total market growing by 12.8%

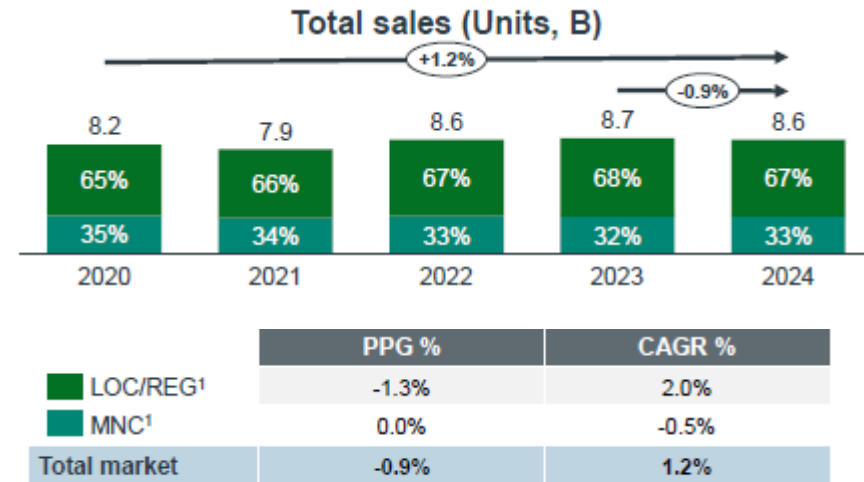
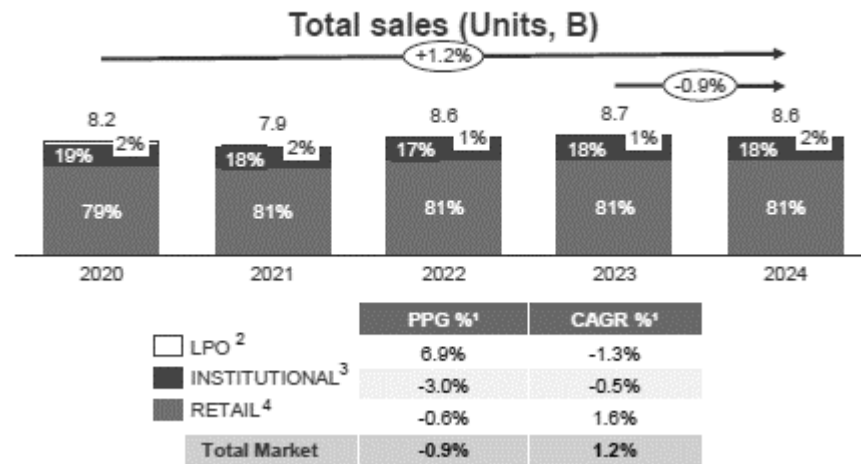
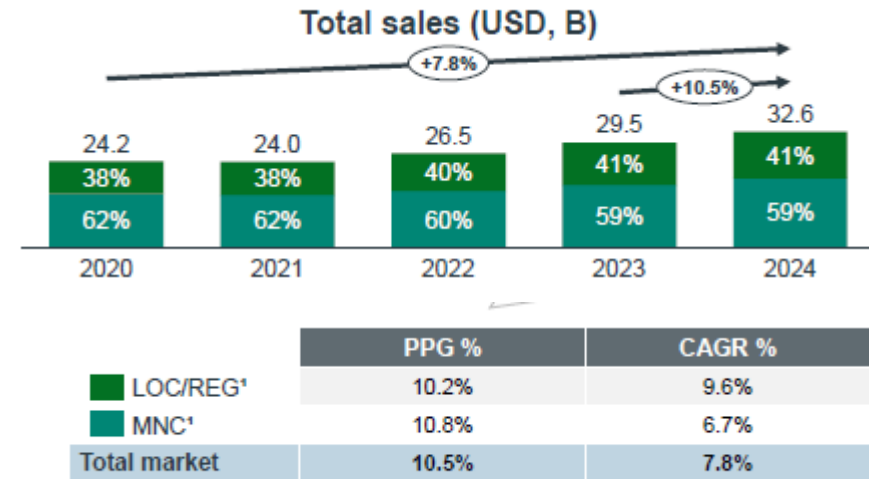
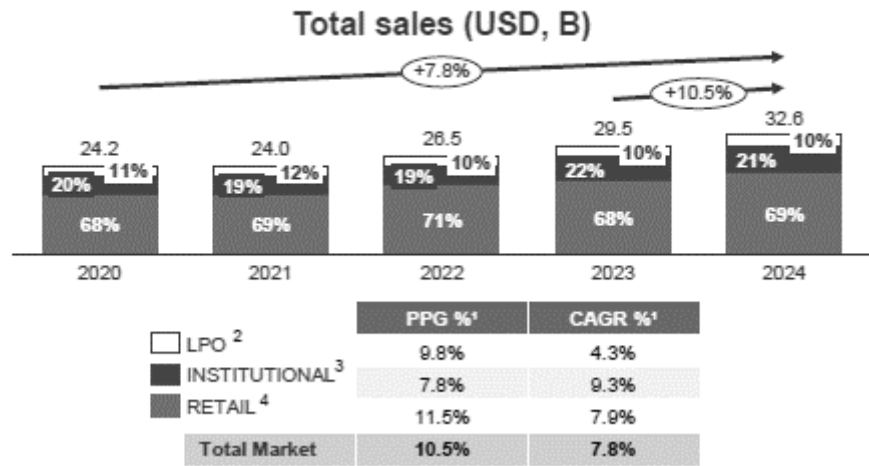
MENA top-10 pharmaceutical companies by sales



MAT JUL 2024 Top Selling Brands Private Market



MENA Deep Dive



Alimentary tract treatment products continues to be the largest TA; while antineoplastic + immunomodulators is the fastest growing TA among top TAs

Top selling Therapy Areas (ATC1s)

PPG%	CAGR%	Ranking change	Sales (USD, B) MAT Q1 2024	R:I	L:M
15%	10%	↔ 1	A (ALIMENTARY TRACT, METABOL) 6.4	77:23	36:64
7%	5%	↔ 2	J (SYSTEMIC ANTI-INFECTIVES) 4.4	55:45	50:50
5%	7%	↔ 3	N (NERVOUS SYSTEM) 3.4	71:29	45:55
17%	14%	↔ 4	L (ANTINEOPLAST+IMMUNOMODUL) 3.3	27:73	14:86
8%	6%	↔ 5	C (CARDIOVASCULAR SYSTEM) 2.9	72:28	46:54
5%	7%	↔ 6	R (RESPIRATORY SYSTEM) 2.4	85:15	49:51
13%	9%	↔ 7	B (BLOOD + B.FORMING ORGANS) 1.7	51:49	38:62
11%	7%	↔ 8	M (MUSCULO-SKELETAL SYSTEM) 1.6	84:16	56:44
11%	7%	↔ 9	G (G.U. SYSTEM & SEX HORM) 1.5	89:11	52:48
11%	8%	↔ 10	D (DERMATOLOGICALS) 1.5	87:13	44:56

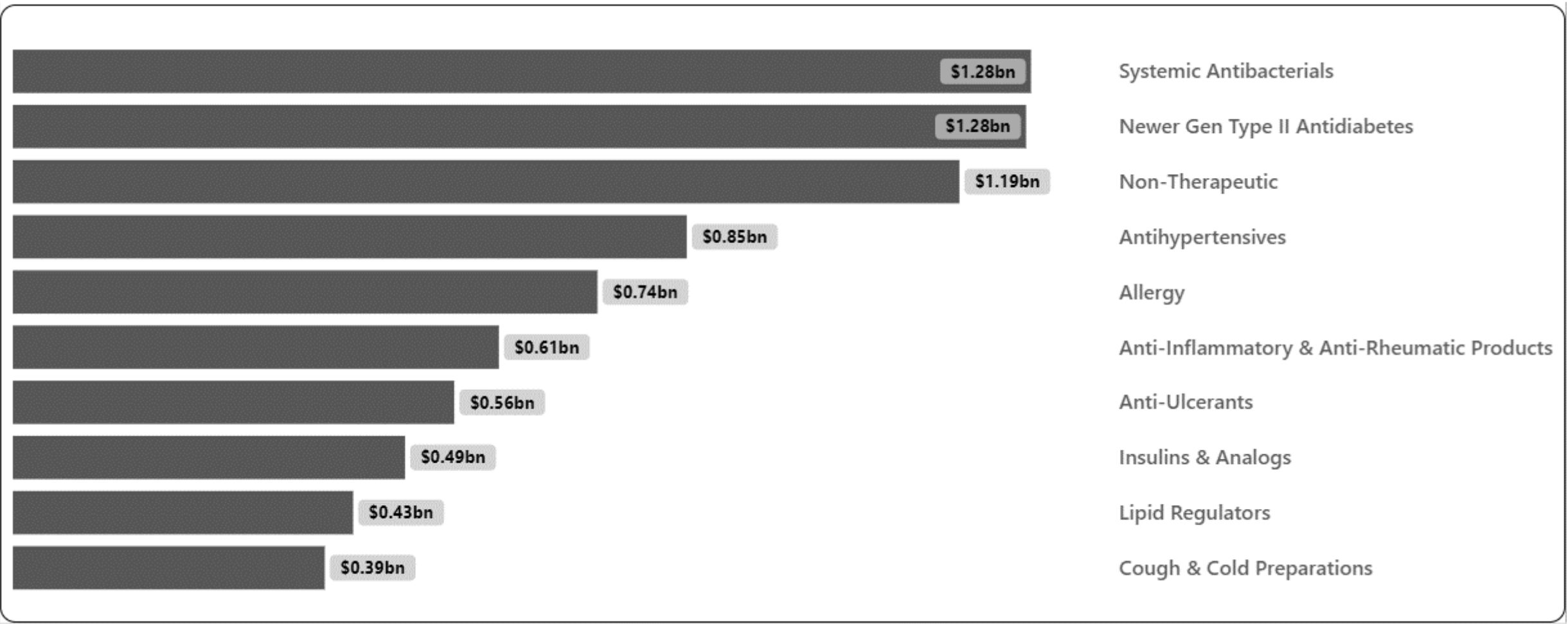
Alimentary tract products continues to be the leading TA in MEA region accounting for 20% the region sales

• KSA accounts for 34.6% share in total alimentary tract sales in MEA, while recording growth of 14.6% PPG in value

• Antineoplastic + immunomodulators has grown at fastest rate (17% PPG), 62% of total TA MEA sales contributed by KSA and UAE grew at a PPG of 10.9% & 31.7% respectively in this TA



YTD JUL 2024 Top Selling TA PVT Market

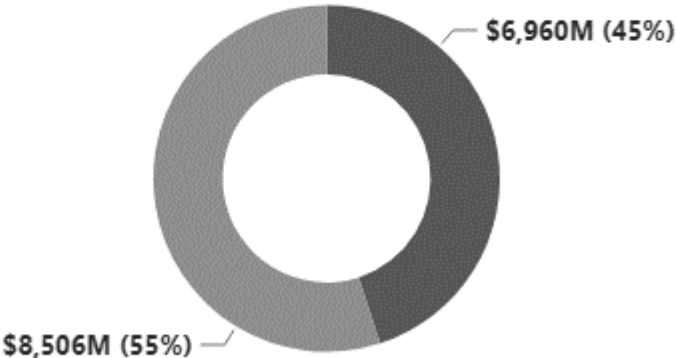


Chronic vs Acute in MENA Market

YTD Jul-24 Retail Market

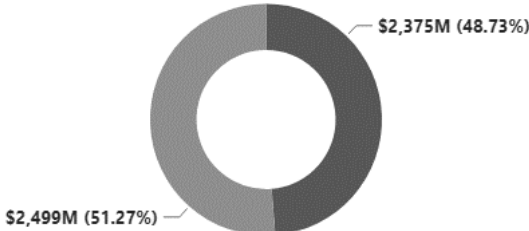
2024 Market Sales \$ (IQVIA)

● Acute
● Chronic



2024 Market Sales \$ (IQVIA)

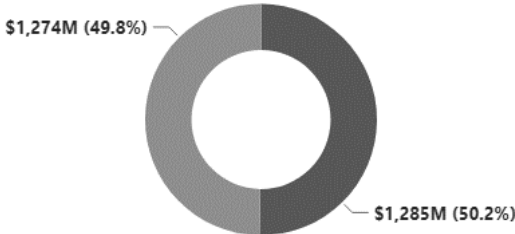
● Acute
● Chronic



KSA

2024 Market Sales \$ (IQVIA)

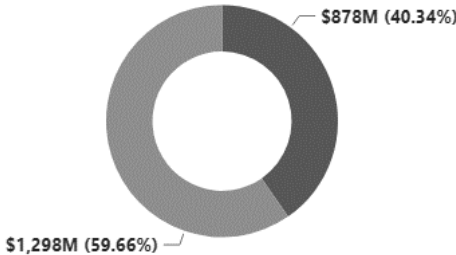
● Acute
● Chronic



EGY

2024 Market Sales \$ (IQVIA)

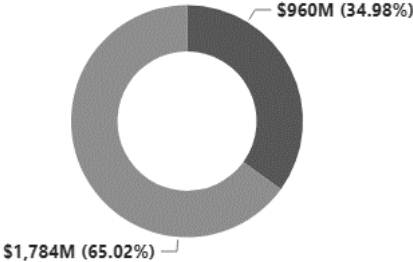
● Acute
● Chronic



ALG

2024 Market Sales \$ (IQVIA)

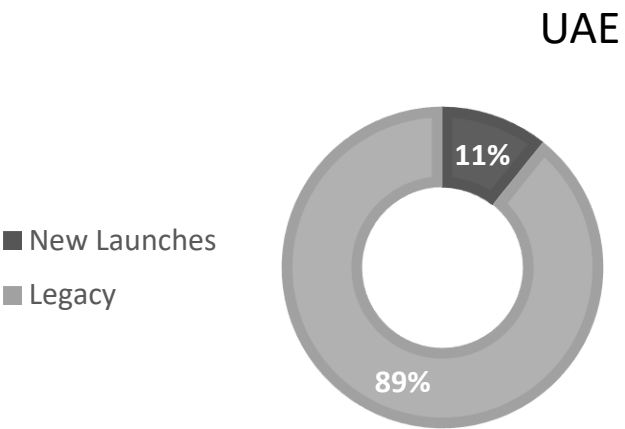
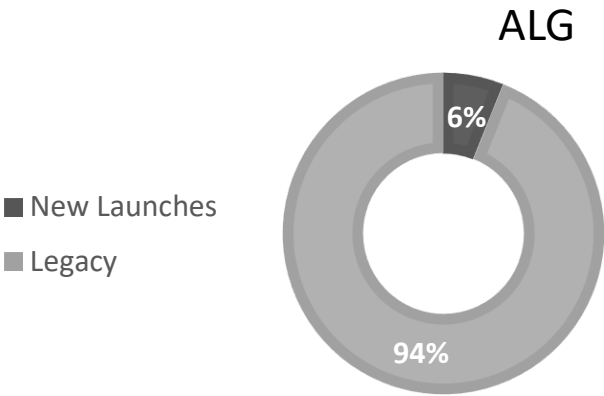
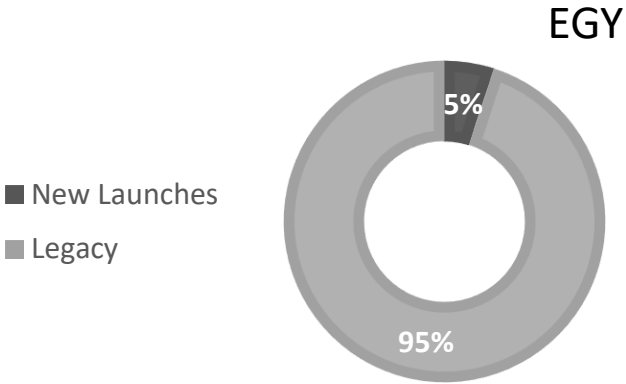
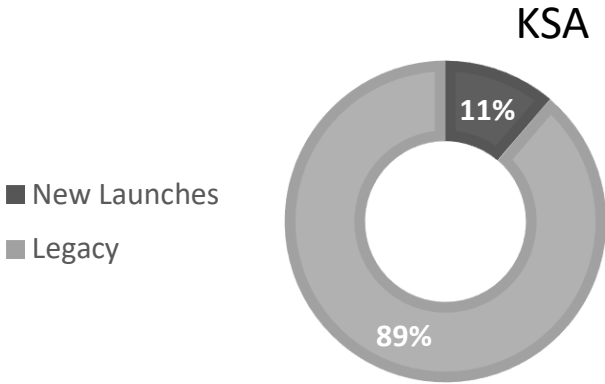
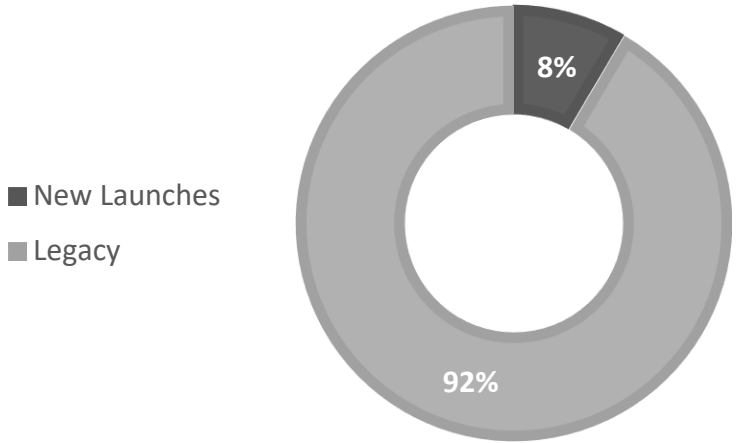
● Acute
● Chronic



UAE



2022 New Launches till Now
YTD Jul 24 PVT Market



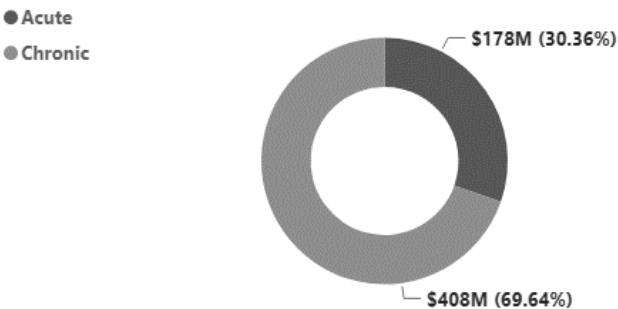
2022 New Launches till Now, Chronic vs Acute

YTD Jul 24 PVT Market

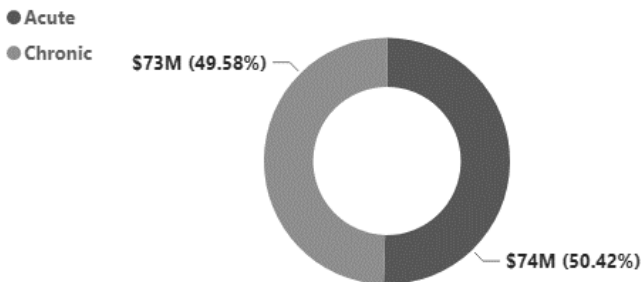
2024 Market Sales \$ (IQVIA)



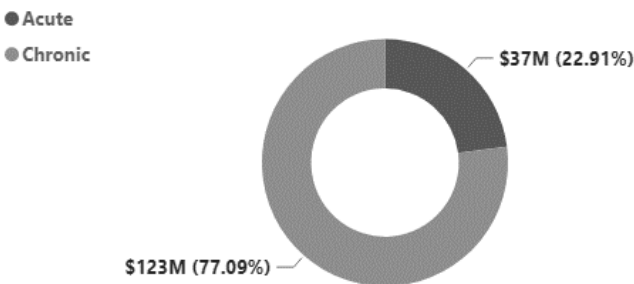
2024 Market Sales \$ (IQVIA)



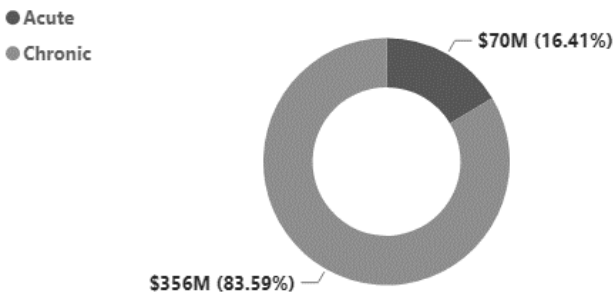
2024 Market Sales \$ (IQVIA)



2024 Market Sales \$ (IQVIA)



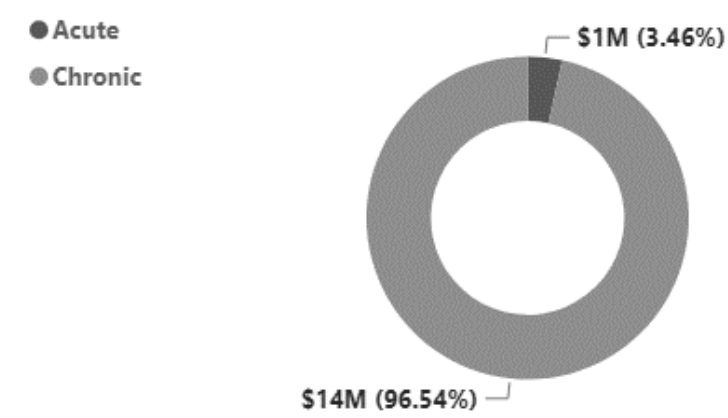
2024 Market Sales \$ (IQVIA)



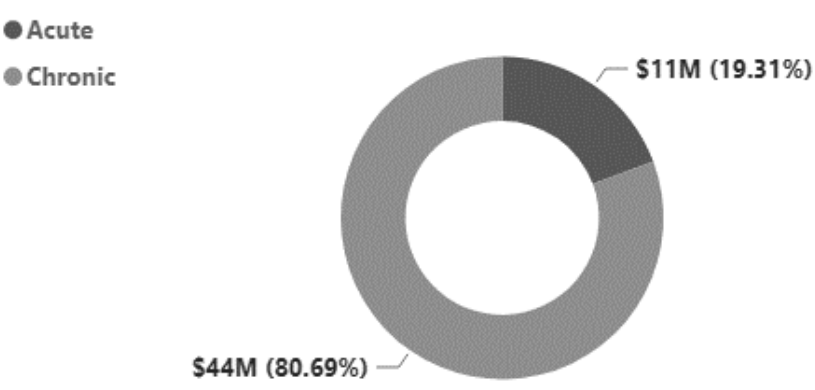
Contribution of Chronicity in main EGY Market Players

Jul 24 YTD Private market

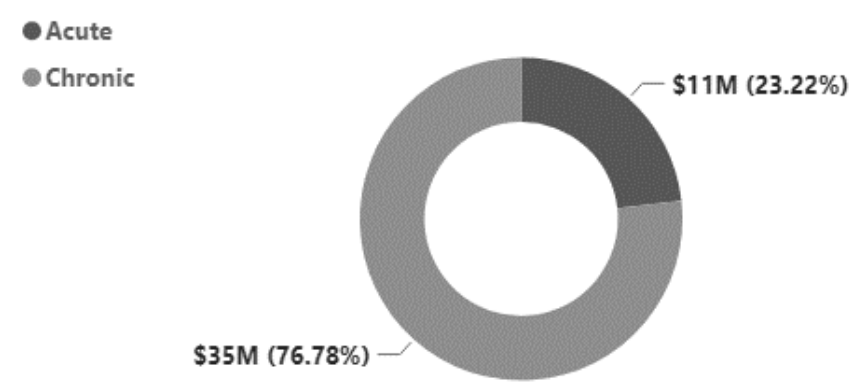
2024 Market Sales \$ (IQVIA) **Zeta**



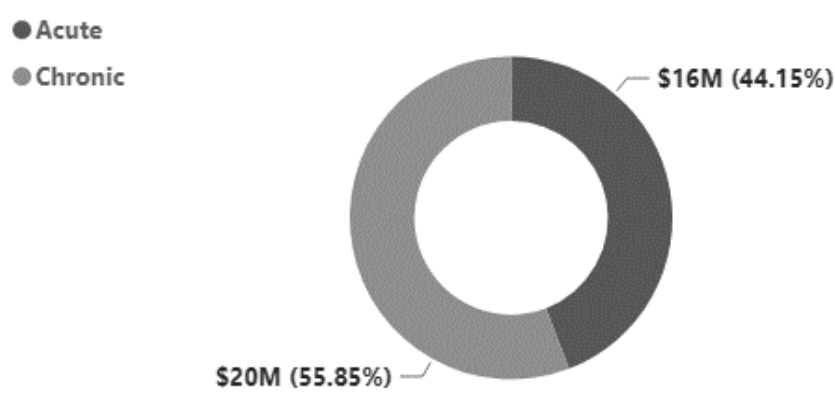
2024 Market Sales \$ (IQVIA) **MARCYRL**



2024 Market Sales \$ (IQVIA) **APEX**



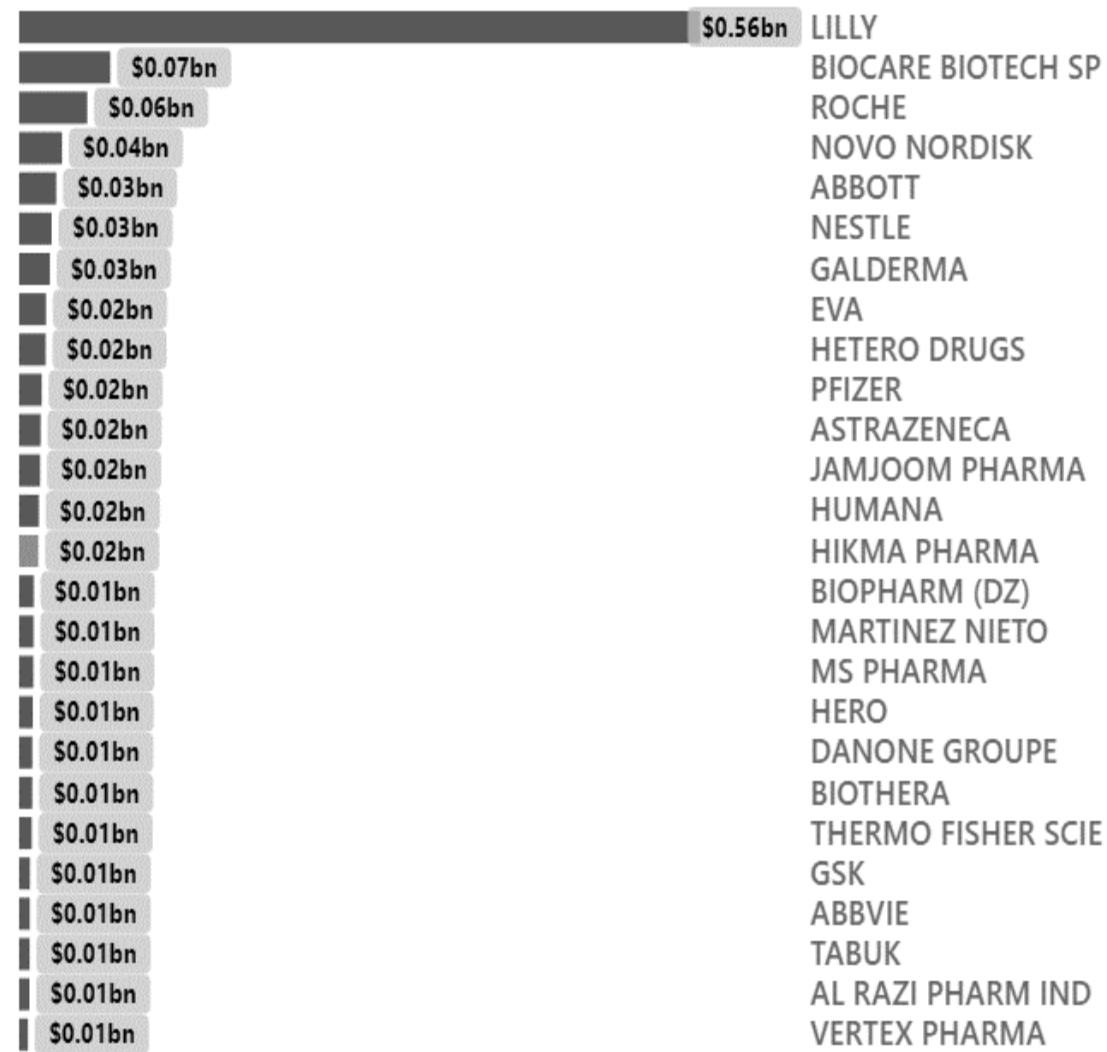
2024 Market Sales \$ (IQVIA) **AUG**



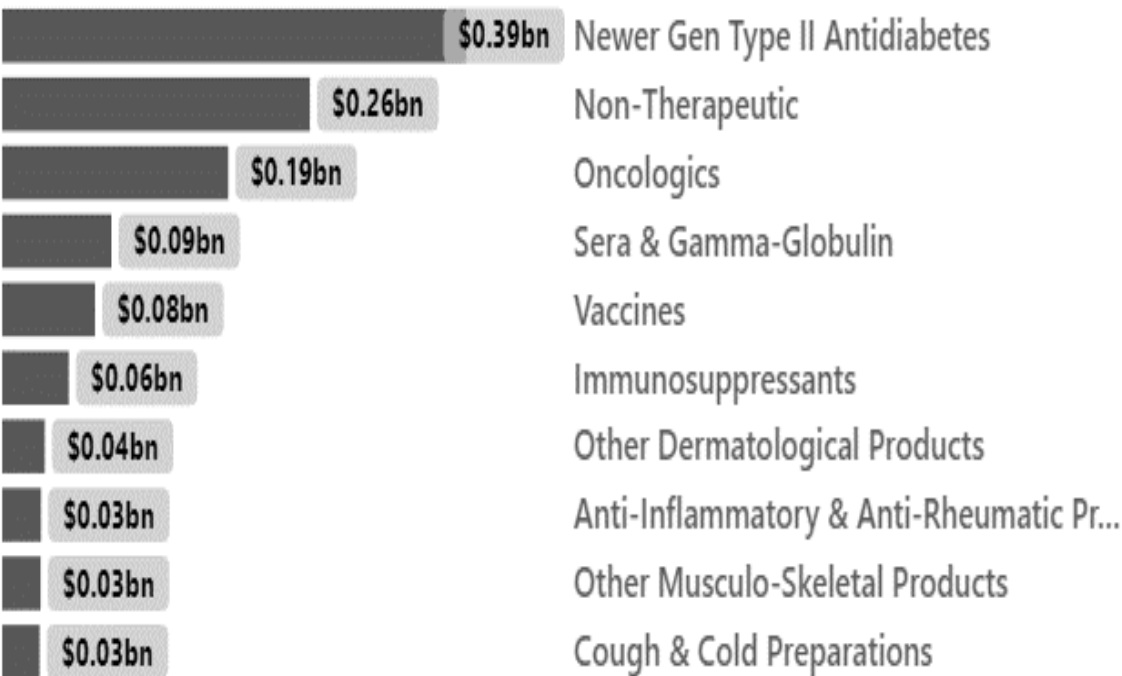
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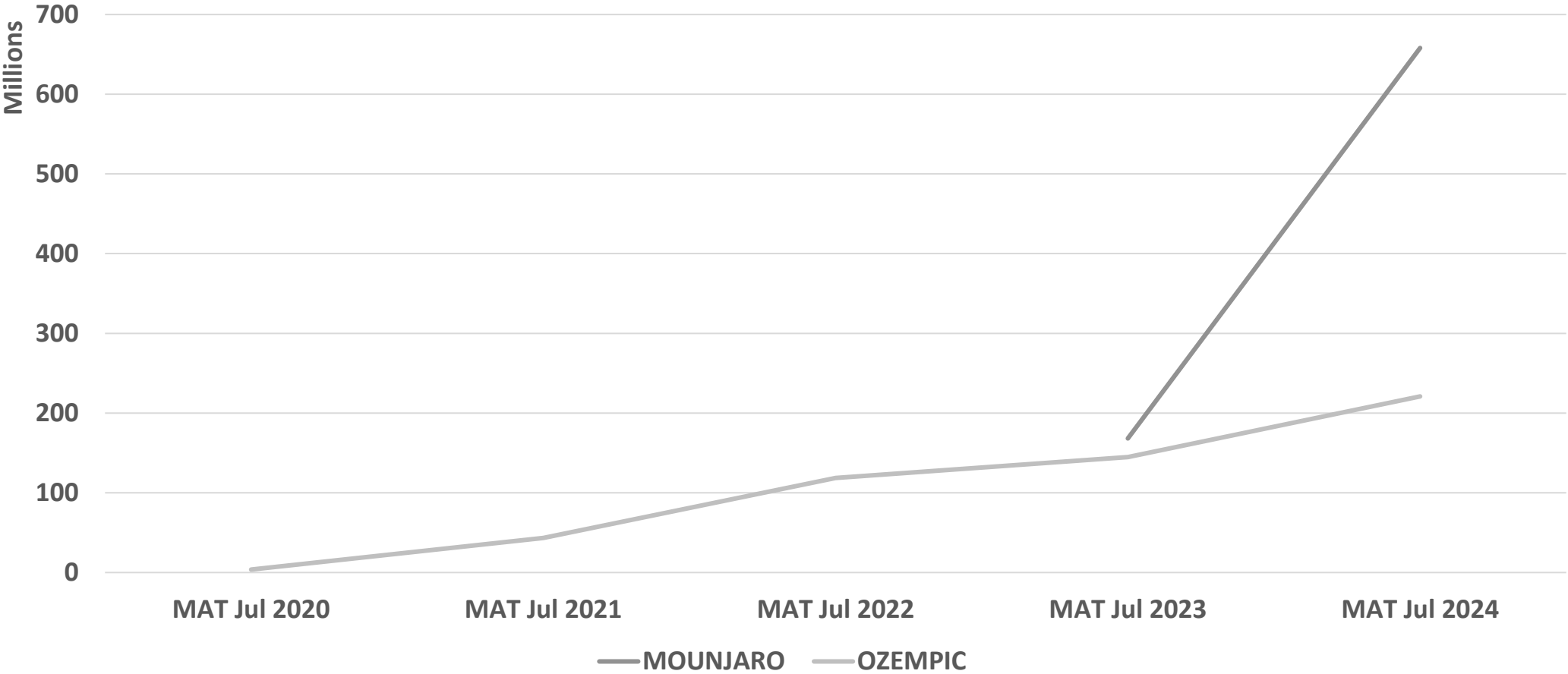
Contribution of New launches in YTD Jul 24 private market



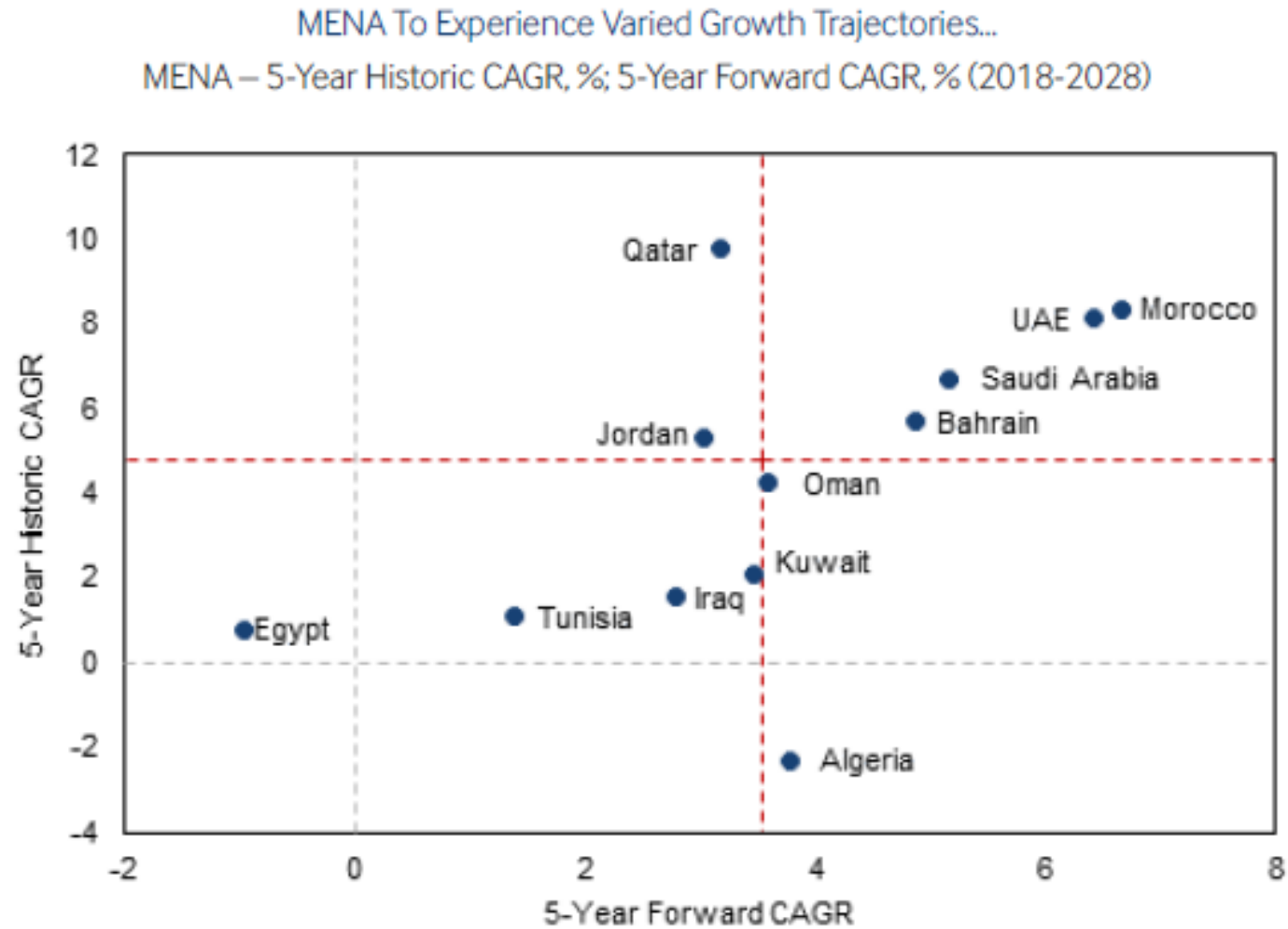
Top 10 Therapy Area Market Sales \$ 2023



Is it best in class launch in MENA!!!



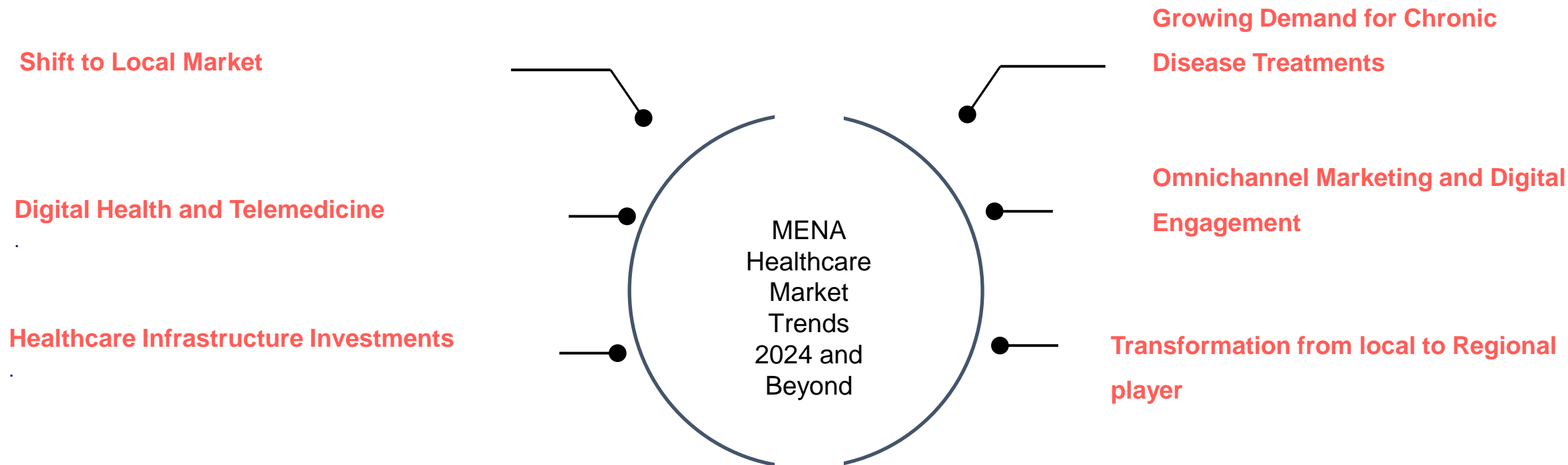
MENA 5 Years Historic CAGR and Forward Growth till 2028



Source: BMI

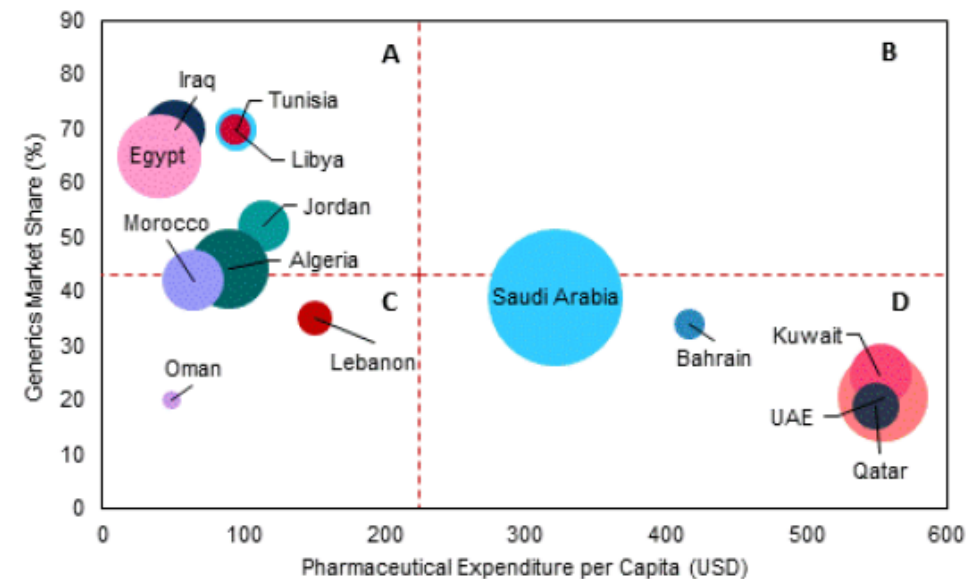


Key trends impacting the healthcare market in 2024



Shift to Local Manufacturing

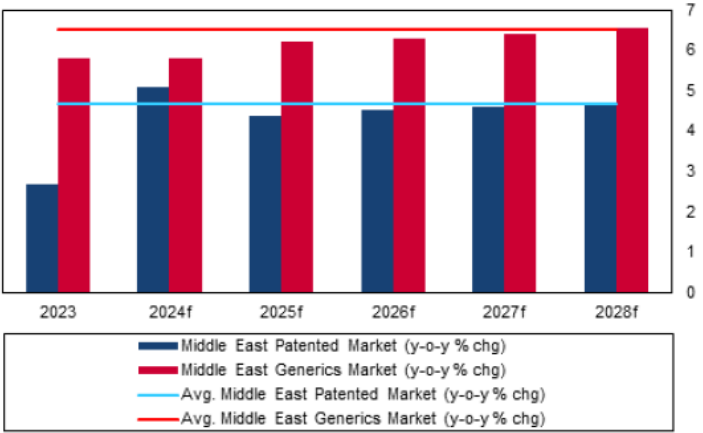
Generic Shares increase



Source: BMI

Growth is driven by new launches in specialised therapy areas

Investing in enhancing our manufacturing footprint



f = BMI forecast. Source: National sources, UN Comtrade, ITC Trademap, BMI

- In Egypt, the government launched a pharmaceutical city near Cairo called **Gypto Pharma**, aiming to turn Egypt into a regional hub for drug manufacturing. This facility allows the production of a range of medicines, including those for chronic diseases like diabetes and heart conditions.
- Local production of generics and biosimilars is increasing, particularly in Egypt, Saudi Arabia, and the UAE, with support from government initiatives.
- Insulin Production in Algeria through BIO CARE BIOTECH SP



MENA Pharmaceuticals Market

- The Middle East, particularly the wealthier GCC countries, has traditionally favored patented drugs over generics. However, ongoing cost-containment efforts and a focus on locally produced medicines are driving a gradual shift towards greater use of generics. This shift is more pronounced in regions like North Africa, where economic conditions and price sensitivity lead to a higher reliance on cost-effective generic drugs. Despite the historical preference for branded medications in wealthier markets, the demand for generics is expected to rise across the MENA region.*



Growing Demand for Chronic Disease Treatments



Dyslipidaemia

43.3%



Hypertension

29.5%



Obesity

28%



Diabetes

16%

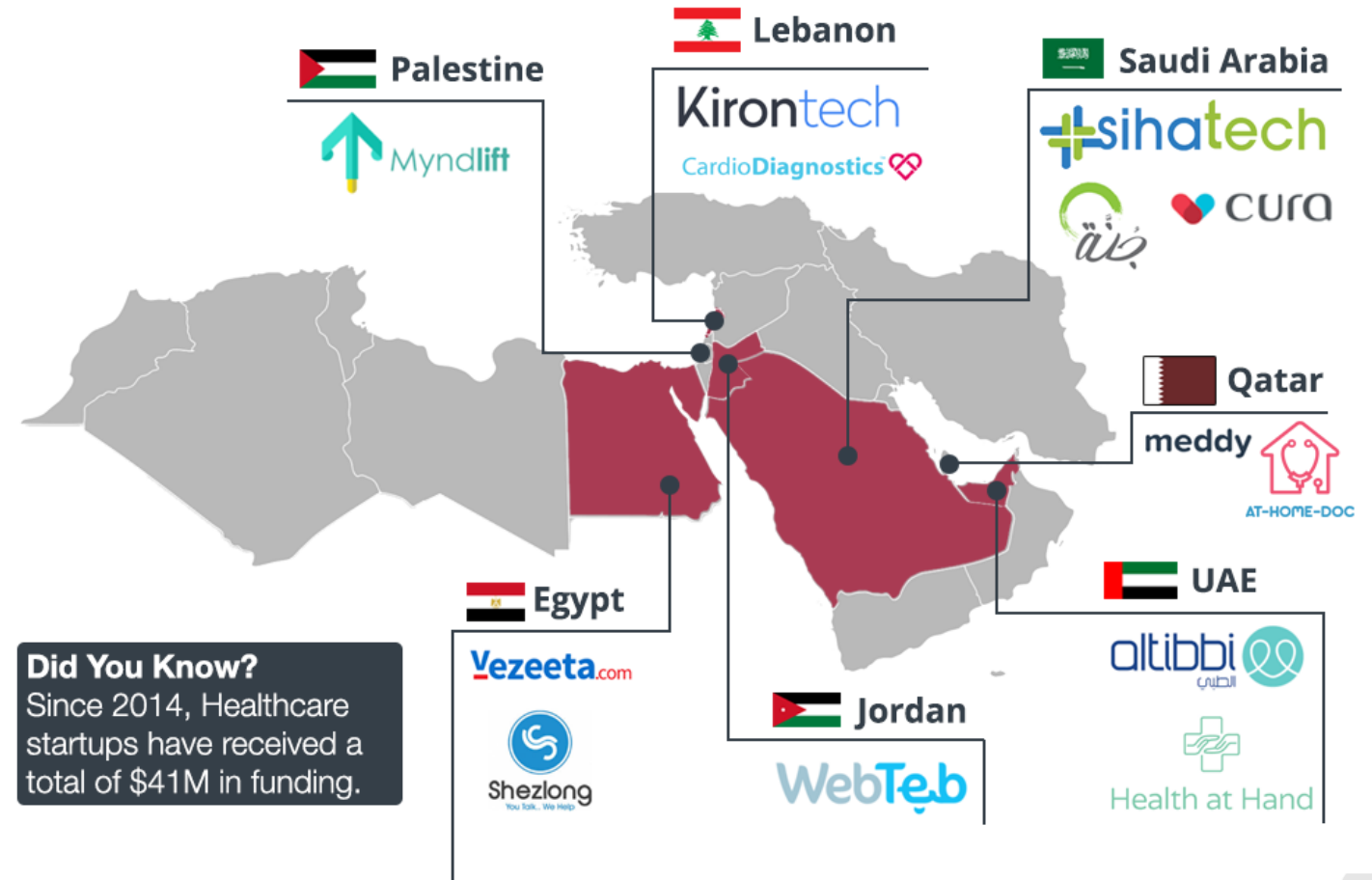
Focus on sustainable growth engine

- The MENA region, particularly the **Gulf States**, has some of the highest rates of diabetes in the world. Pharmaceutical companies like **Novo Nordisk** have made the region a priority market for their insulin and diabetes management products.
- Launches of CVD products in Egypt through Multinationals and EGY

Digital Health and Telemedicine

- The Abu Dhabi Health Services Company (SEHA) rolled out a telemedicine platform during the pandemic to facilitate remote consultations. This platform is being further developed, offering remote monitoring for chronic diseases, enhancing the patient journey, and optimizing pharmaceutical care delivery.
- Saudi Arabia's Vision 2030As part of Saudi Arabia's Vision 2030, the country has launched several digital health initiatives. Mawid, an e-service for booking and managing health appointments, and Sehhaty, an app for telemedicine, allow patients to have virtual consultations and refill prescriptions remotely.

Top Funded Digital Healthcare Startups in MENA



E-Pharmacy Global Facts 2021

Market Size in 2021	\$69.8 Bn
Forecast Period 2022 to 2028 CAGR	16.80%
2028 Value Projection	\$207.2 Bn
Breakdown by Market Share	OTC products segment >70%
Breakdown by Market Value	Prescription medicine market >\$17B
Country Market Share	North America: >35% Europe: >26%

Growth Drivers & Challenges

Growth Drivers

- Increase in the number of internet users worldwide
- Increasing access to web-based/online services
- Growing geriatric population coupled with a growing prevalence of chronic disorders
- Lucrative offers and discounts along with
- Easy access to online prescription drugs
- Booming digital health industry

Pitfalls & Challenges

- Increasing number of illegal online pharmacies
- Risk of counterfeit drugs

Different Applications to Consider

Vezeeta.com

chefaa

وصفتي
WASFATI
Medication Delivery Service

Aster
PHARMACY
We'll Treat You Well

صيدلية دوت كوم
Sidalih
.com

Rosheta

Yodawy

dawayya
اشترى راحتك و دواك .com

Supporting Evidence & Recommendations



Business Directions - Between 2021-2020 funds exceeding \$50m were dedicated to e-pharmacies in Egypt

Current Business

KSA: 141.6 Mio US \$ 2022

Egypt: 194.6 Mio US \$.

UAE: 112.7 Mio US \$



Expected Business 2027

KSA: 214.7 Mio US \$ with CAGR 8.7%.

Egypt: 1.1 Billion US \$ with CAGR 41%

UAE :304 Mio US \$ with CAGR 22%



Level of Penetration

KSA: in 2022 26% and in 2027 32.2%

Egypt: in 2022 11.6 and in 2027 18.5%

UAE :in 2022 32.5% and in 2027 38%



Omnichannel Marketing and Digital Engagement

Accelerated Shift

- Pharmaceutical companies are shifting towards omnichannel marketing strategies to engage healthcare professionals (HCPs) and patients. This includes a mix of in-person detailing, virtual meetings, digital content, and e-learning for HCPs.
- The role of field force will evolve to be more digital-savvy, supporting engagement across various channels

Pfizer



Pfizer has launched an innovative digital platform, IUdo for the eligible patients in Qatar. The mobile app is designed to make it easier for patients on selected Patient Support Programs to access Pfizer medications.

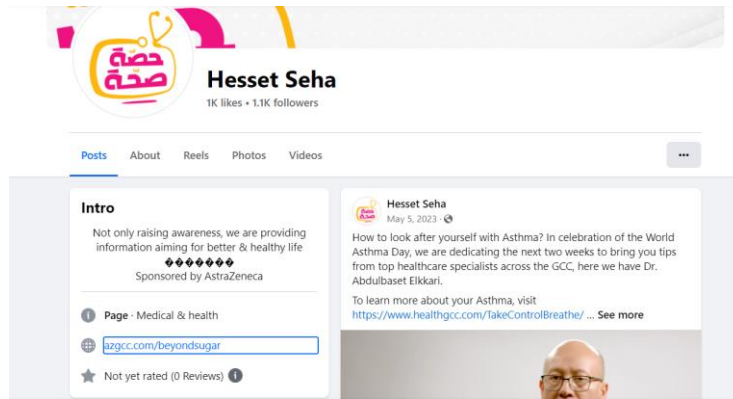
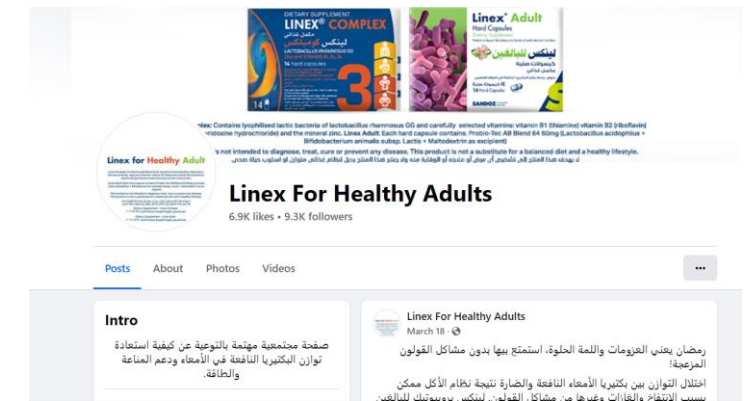
AZ

” نسمة هوا ” اتفاقية
تعاون بين أسترازينيكا
وحياة كريمة لدعم مرضي
الجهاز التنفسي

آيات الحكيم

AA 4:48 مساءً | 2024/06/09





Examples of awareness campaigns in MENA

Healthcare Infrastructure Investments

Accelerated Shift

- Egypt launched a new Universal Health Insurance System in 2018. As part of this initiative, the government is expanding coverage to previously uninsured citizens, creating a larger market for pharmaceutical companies, especially in areas like generics and chronic disease treatments.

- UAE's Mandatory Health Insurance
In the UAE, mandatory health insurance in Abu Dhabi and Dubai has increased demand for pharmaceuticals. Multinational companies have partnered with local healthcare providers to offer a wide range of medicines for covered patients, improving access to essential treatments.

The expansion of coverage will lead to increased demand for affordable medicines and preventive care. This will create opportunities for generic drug manufacturers and increase competition in the market. Pharma companies will need to adapt their pricing models and ensure they provide cost-effective solutions without compromising on quality.

Turning to Regional Players

Accelerated Shift

• In the next few years, local MENA pharmaceutical companies will continue to expand beyond their home markets, driven by a focus on **affordable treatments**, **regional partnerships**, and **growing demand** in emerging markets. Key regions for expansion include **Africa**, **Southeast Asia**, **Eastern Europe**, and potentially **Latin America**. These companies are expected to leverage **biosimilars**, **generics**, and partnerships to scale internationally.





What Changed In MENA

Investment in Local Manufacturing and R&D

EVA: To meet the demand for affordable medications and reduce reliance on imports, Eva Pharma has significantly expanded its local manufacturing capabilities. They've also invested in R&D to create high-quality generics and biosimilars, especially in the areas of oncology and chronic diseases like diabetes.

Partnerships with Global Pharmaceutical Companies

Julphar has formed strategic partnerships with global pharmaceutical giants like Boehringer Ingelheim to bring advanced therapies to the Middle East. These collaborations help local companies offer innovative treatments for chronic diseases, such as new diabetes medications that align with the preventive healthcare trend.

Supporting Remote Monitoring and Chronic Disease Management

Tabuk has partnered with digital health platforms that specialize in chronic disease management to integrate their products into remote monitoring systems. This allows HCPs to monitor patients' health in real-time and adjust their treatments as necessary, ensuring that patients with conditions like diabetes or hypertension have better disease control and medication adherence.

Focus on Genomic and Personalized Medicine

G42 Healthcare (UAE): A subsidiary of Abu Dhabi's G42 Group, G42 Healthcare is a leader in the personalized medicine space. They are investing in genomic research to develop customized treatments tailored to the region's unique genetic makeup. Their collaboration with global players like AstraZeneca on genomic data is helping drive the shift toward personalized medicine, positioning local companies as key players in the future of healthcare.

