



Sharpen Your Skills

MARKETING *Club* 180th

809th Marketing Club
136th Business Club
42nd Riyadh Club



CLUB FOUNDER, HOST
DR. MAHMOUD BAHGAT
LEGENDARY DIRECTOR

Dominating the Saudi Pharmaceutical Market

Smart Strategies for Growth, Regulatory
Navigation, & Competitive Edge

JOIN FREE



LIVE WEBINAR

Date

**20 May
2025
Tuesday**

10 pm



Egypt

10 pm



KSA

11 pm

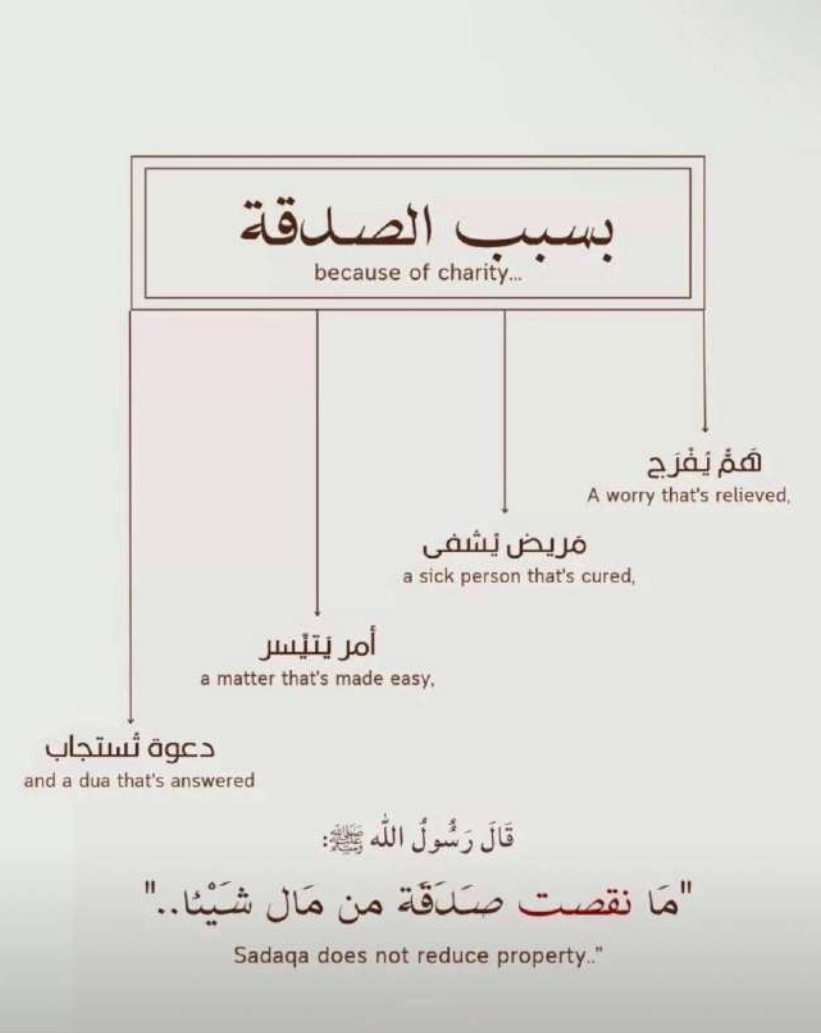


UAE

Place
Online
Zoom



Instructor
Dr. Mohamed Sherif
Marketing Manager



MOHAMED ELSHERIF BIOGRAPHY

- Mohamed ElSherif Marketing Manager – MS Pharma KSA
- BVSc, MVSc, Ph.D, MBA, DBA (on-going)
- Alexandria University, IBAS (International Business Academy of Switzerland)
- Strategic Marketing Leader with 20+ years in multinational pharmaceutical marketing, specializing in



- Drive market share growth (200M SR + revenue) through customer-centric strategies and KOL engagement.
- Launch 10+ first-to-market products (e.g., biosimilars, Oncology, CNS/CVS therapies) with tailored patient journeys.
- Leverage predictive analytics (IQVIA, Nielsen) to optimize pricing, forecasting, and stakeholder value propositions.
- Collaborate with Medical Affairs, Market Access, and Supply Chain to align KSA strategies.



MOHAMED ELSHERIF BIOGRAPHY



- Regulatory Framework
- Market Overview
- Stakeholder Mapping
- Market, Portfolio & FTEs

KSA Official entities & Roles :



- **SFDA : Saudi Food & Drug Authority**
Registration and Licensing, Quality Control, Clinical Trials Oversight, Post-Market Surveillance, Pharmacovigilance.



- **NUPCO : National Unified Procurement Company**
Official authority responsible for governmental purchases



- **LCGPA : Local Content & Government Procurement Authority**
concerned with developing local content in all its components at the level of the Saudi Arabia economy, and improving government procurement work and following-up to achieve development and financial goals in accordance with national visions, strategies and plans, and in accordance with the laws and regulations in force



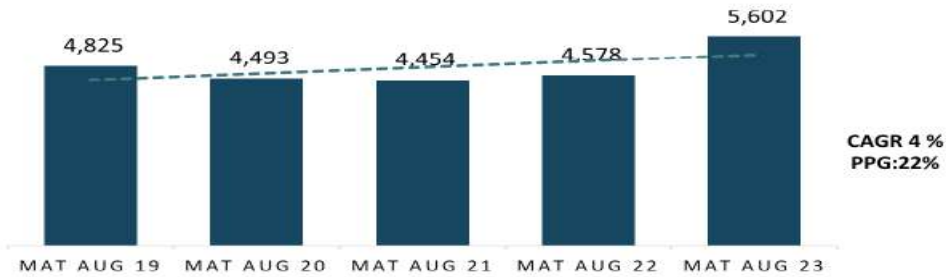
- **Council of health insurance (Nphies)**
Involved in improving the quality and effectiveness of healthcare services and driving digital transformation in the Kingdom's health insurance sector.

Agenda

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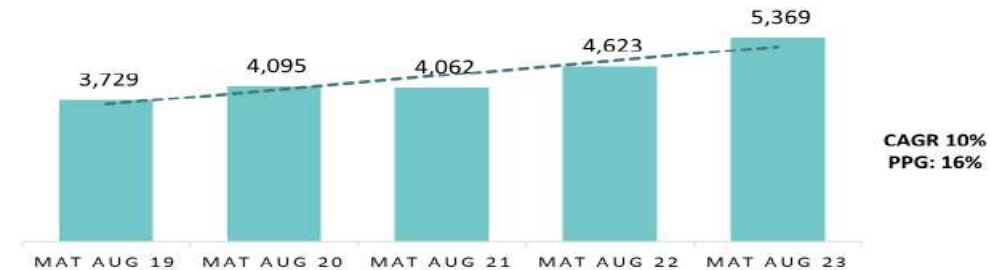
KSA: Total Market 19'-23' (based on gross prices)

Governmental Market Development 19'-23'
Value \$ BUSD "MNF Price"



G2N in tender is based on bidding price

Private Market Development 19'-23'
Value \$ MUSD "MNF Price"



G2N in private is 50%

Highlights



\$10,971M



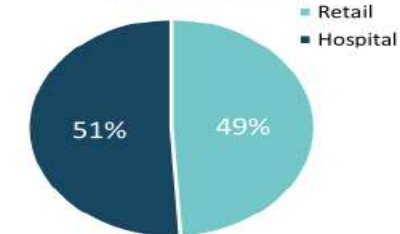
PPG: 19%



CAGR: 6%

Sources: IQVIA data, MAT AUG 23'

Contribution % 23'



Sources: IQVIA data, MAT AUG 23'



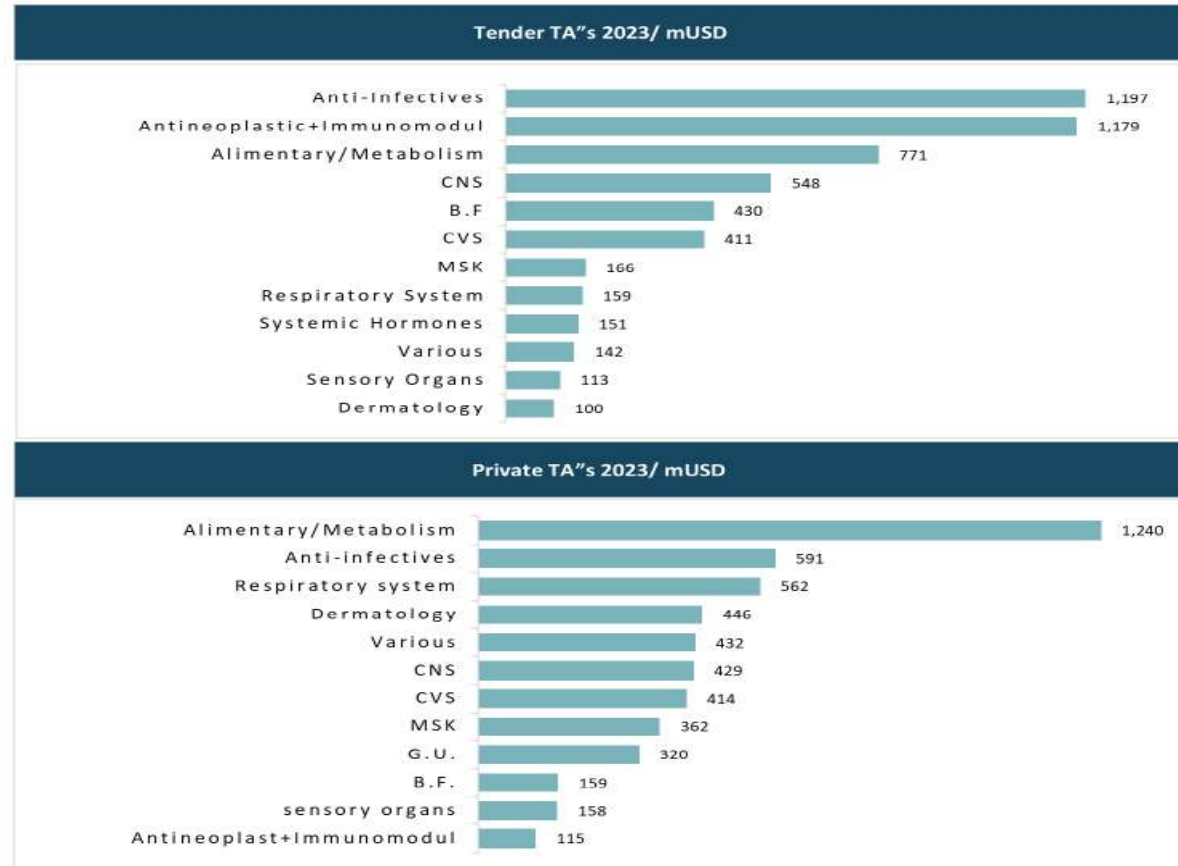
KSA Total Market: Top 20 Corporation

Rank	Mfr.	Value Mn USD	MS%	PPG%	CAGR%	T:P %	Comments
1	HIKMA	673	6%	32%	16%	60:40	<ul style="list-style-type: none"> Top 20 Companies share from the total market is 66% KSA market continues to grow on both PPG (double digit growth) & CAGR.
2	SANOFI	631	6%	14%	2%	62:38	
3	TABUK	576	5%	11%	7%	40:60	
4	SPIMACO	551	5%	10%	7%	27:73	
5	NOVO NORDISK	537	5%	20%	13%	55:45	
6	PFIZER	456	4%	12%	-2%	85:15	
7	NOVARTIS	405	4%	10%	2%	66:34	
8	JAMJOOM	383	3%	36%	17%	23:77	
9	ASTRAZENECA	375	3%	22%	10%	54:46	
10	GSK	354	3%	23%	9%	60:40	
11	MERCK & CO	313	3%	29%	4%	69:31	<ul style="list-style-type: none"> Hikma is leading the Saudi market with 30% of its revenues are from anti-infective, 15% CVS, 14% immunosuppressant, 15% Alimentary mainly PPI. Vaccines, Drug in Diabetes & Biologics are revenue drivers for multinationals in the institutional business : <ul style="list-style-type: none"> Sanofi: Anti-Infect (vaccines) & Diabetes 73% Novo Nordisk: Diabetes & Obesity 53% Pfizer: : Anti-Infect (vaccines) & ANTINEOPLAST. 86% Novartis: ANTINEOPLAST 43% Anti infectives, PPI, fast moving products are revenue drivers for generic companies in private market: <ul style="list-style-type: none"> Tabuk: CVS 25%, Anti-Infect 18%, PPI 13%, CNS 12% Spimaco Anti-Infectives 25%, CNS 18%: Respiratory & MSK 27% Jamjoom: : Alimentary 21%, Dermatology & sensory 25%.anti infectives 13%.
12	ABBVIE	300	3%	11%	0%	55:45	
13	ROCHE	294	3%	3%	7%	91:9	
14	JOHNSON & JOHNSON	222	2%	16%	7%	84:16	
15	AMGEN	218	2%	17%	20%	88:12	
16	NESTLE	213	2%	13%	7%	8:92	
17	BOEHRINGER INGEL	208	2%	34%	23%	39:61	
18	ABBOTT	200	2%	-1%	-3%	22:78	
19	LILLY	181	2%	6%	6%	38:62	
20	MECP	181	2%	18%	10%	26:74	
TOTAL		10,971	100%	19%	6%	51:49	

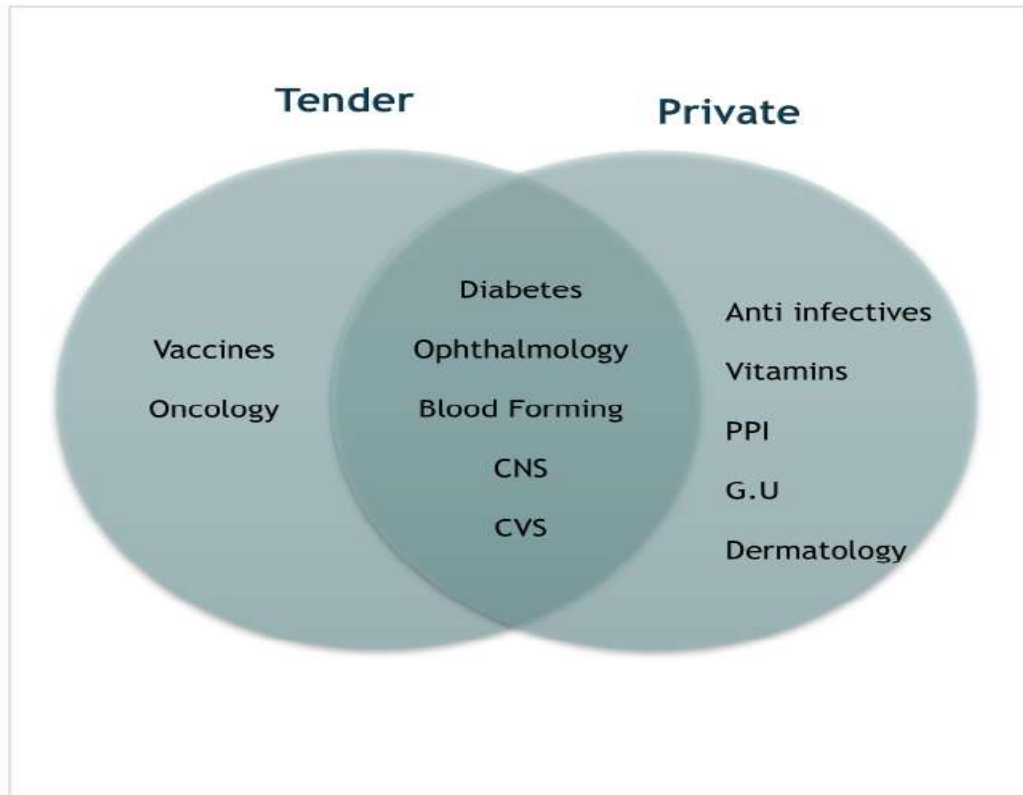


KSA: Total Market TA's

Total Market TA's 2023/ mUSD	CAGR% Y' 19-23	T:P%
ALIMENTARY/METABOLISM	9%	38:62
ANTI-INFECTIVES	2%	67:33
ANTINEOPLAST+IMMUNOMODUL	13%	91:9
CNS	7%	56:44
CVS	6%	50:50
RESPIRATORY	7%	22:78
B.F.	2%	73:27
VARIOUS	1%	25:75
DERMATOLOGY	10%	18:82
MSK	8%	31:69
G.U.	5%	18:82
SENSORY ORGANS	4%	42:58
SYSTEMIC HORMONES	9%	68:32
DIAGNOSTIC AGENTS	8%	67:33
HOSPITAL SOLUTIONS	2%	80:20
PARASITOLOGY	-2%	22:78



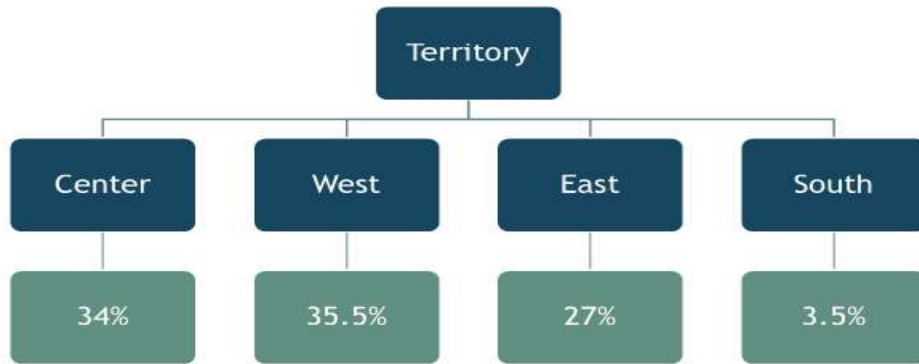
KSA: Total Market TA's



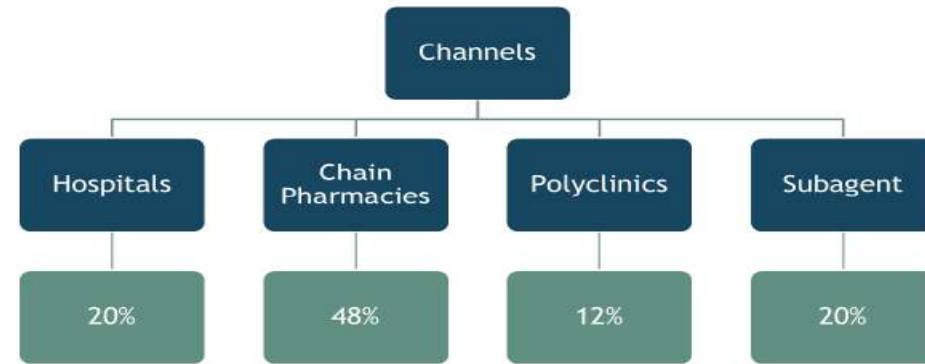
Main value contributors for TA		
TA	Tender	Private
Alimentary/Metabolism	New Anti-diabetics	Anti Diabetics PPI/ Vitamins
Anti- Infectives	Vaccines	Systemic anti infectives
Immunomodulator	Mainly institutional business	
CNS	Specialized CNS anti psychotics antiepileptics	analgesia anti-depressant
CVS	Lipid lowering agents and antihypertensives	
Respiratory	Inhalers	Inhalers Nasal Sprays Cough and cold
BLOOD FORMING	Blood coagulation Anti anaemic	Anti thrombotic
Dermatology	Psoriasis "Biological"	Hyaluronic acids OTC
Urology	Mainly Private market	

Strategic TA's common between private & tender are Diabetes, Ophthalmology, CVS, Blood & CNS.

KSA Private Market at territory and channels level:



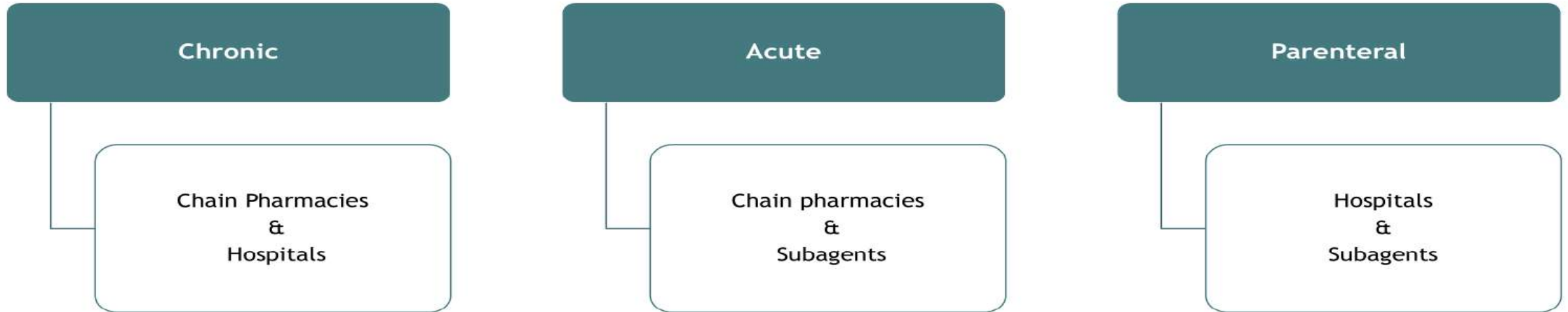
Center & west are contributing to almost 70% of the market



Chain pharmacies contribute to almost 50% of the market, which shows its importance across channels.



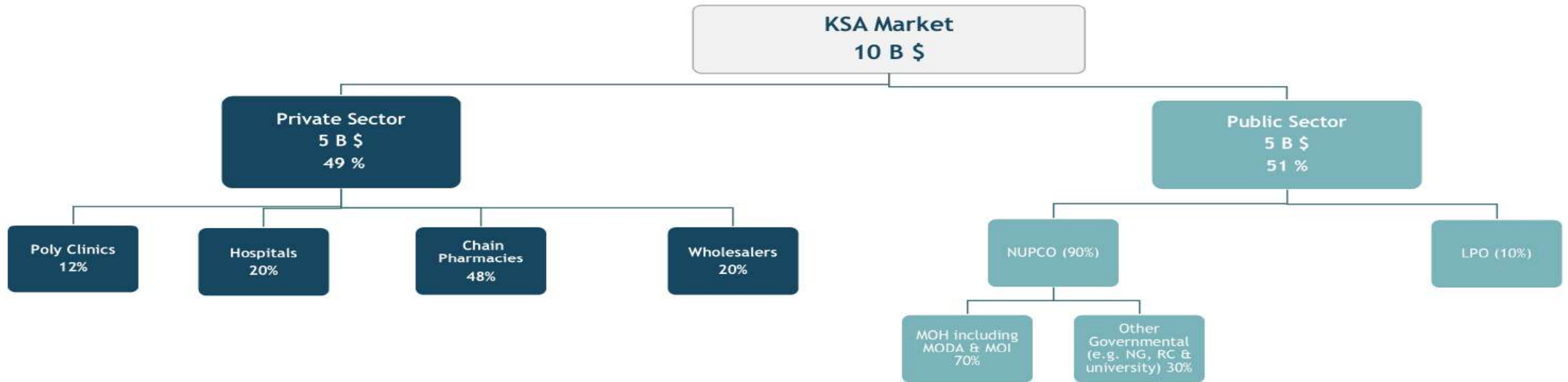
Depending on the type of therapy, products are distributed differently in channels



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KSA Stakeholder Mapping



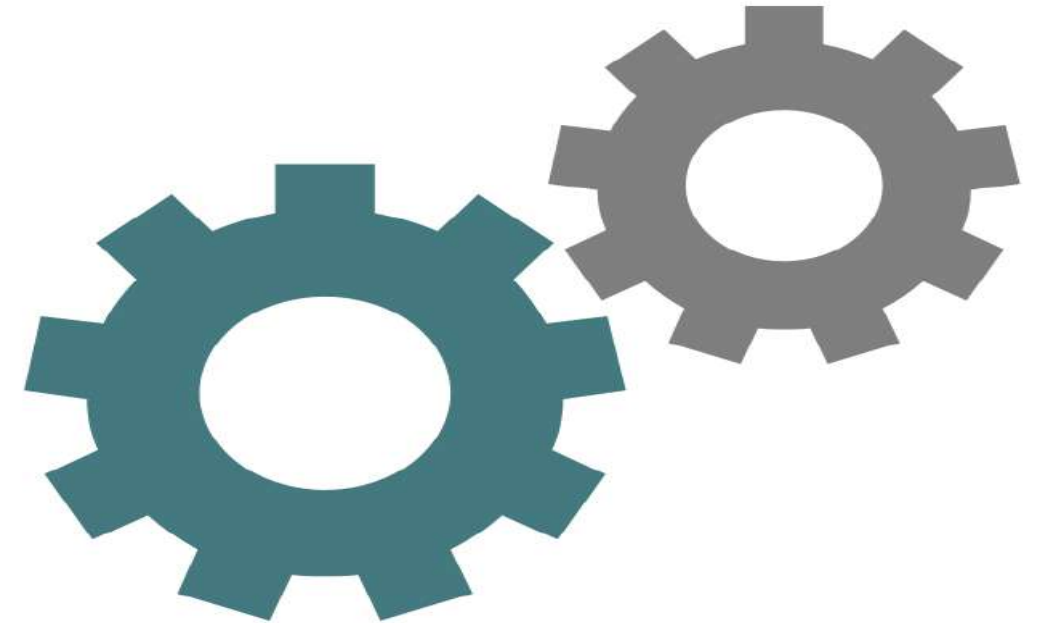
Stakeholder mapping - KSA Private Sector

Criteria	Hospitals	Poly clinic	Chain Pharmacy	Subagent Indirect Centers (Hosp. & PC.)
Time to Listing Products	3 Month to 12 Months	1 Month to 6 Months	1 Month to 6 Months	1 Month
listing Fees				
Number of Brands	1-3 brands	Multi-Brand	Multi-Brand	Multi-Brand
Stakeholder Needs	Originator/ Highest Profit/ Lowest Price	Lowest Price & HCP support	Highest Profit	Highest Profit / Lowest Price
Channel Sales Contribution%	20%	12%	48%	20%
Product Classification	Chronic & Parenteral	Acute, Chronic & Parenteral	Acute & Chronic	Acute & Parenteral

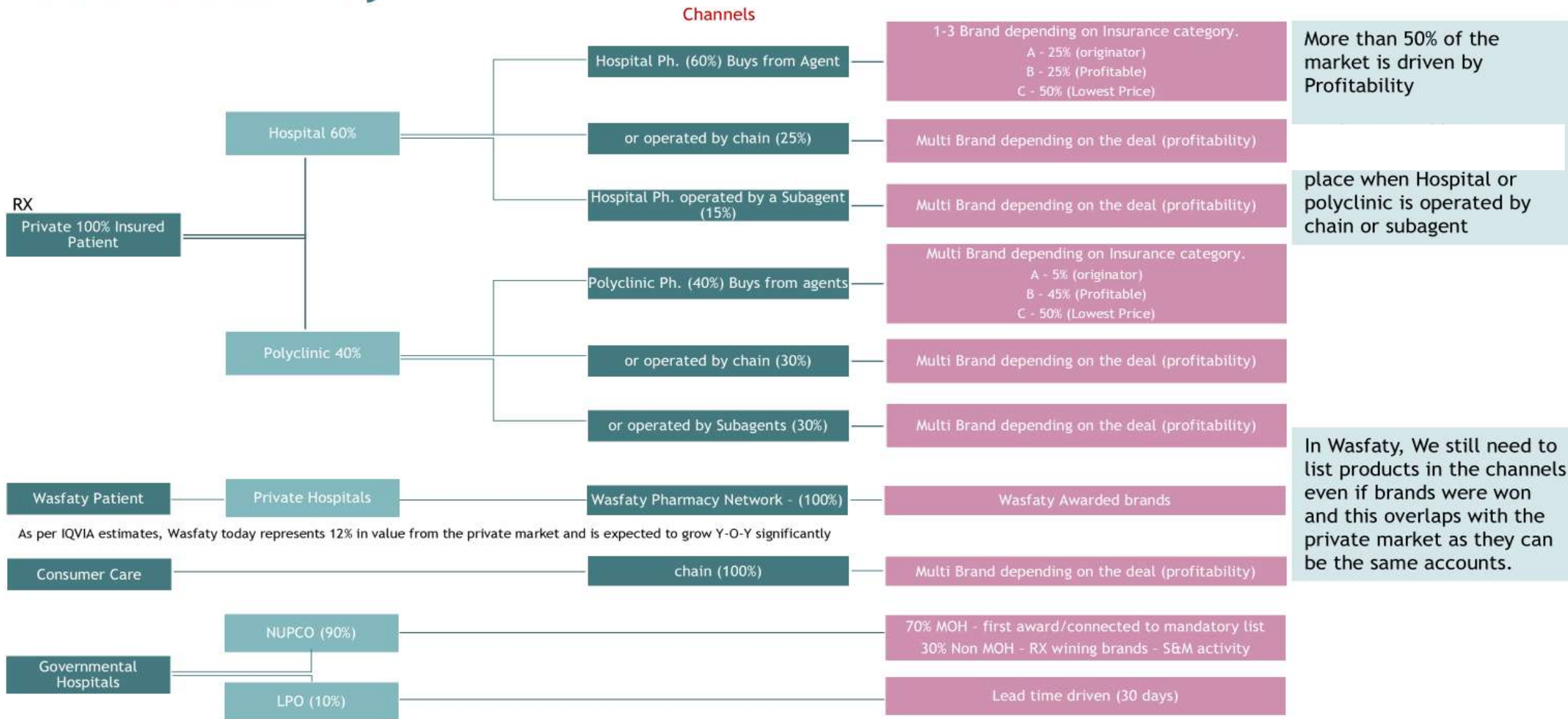


Tender market: HCP & Purchasers Influencing effect

- In Formulary Brand listed products the Purchaser is the decision maker in listing process.
- In the liquidation process for any product (non-branded) HCP is the decision maker.



Patient Journey



* Some accounts buy 1 brand - their prescription is by INN



Where your Company is more focused on Hospitals vs Chain pharmacies today, due to high commercial competition at Chain Ph.

Criteria	Hospitals	Poly clinic	Chain Pharmacy	Subagent Indirect Centers (Hosp. & PC.)
Stakeholder Needs	Originator/ Highest Profit/ Lowest Price	Lowest Price & HCP support	Highest Profit	Highest Profit / Lowest Price
Channel Sales Contribution%	20%	12%	48%	20%
Company 's Sales Contribution per Channel '25	38%	6%	23%	33%

Chain Pharmacy contribution can only be increased with competitive commercial offerings, high discounts.



Promotion strategy is needed for Rx generation while commercial offering is needed to guarantee access & market share.

