



# MARKETING *Club* 181<sup>st</sup>

181<sup>st</sup> Marketing Club  
137<sup>th</sup> Business Club  
42<sup>nd</sup> Jeddah Club

## Diagnostic Laboratories Role in Pharmaceutical Marketing



CLUB FOUNDER, HOST  
**DR. MAHMOUD BAHGAT**  
LEGENDARY DIRECTOR



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LIVE WEBINAR

Date

27 May

2025

Tuesday

10.30 pm EGY & KSA



Egypt



KSA



UAE

Place

Online  
Zoom



Instructor

By **Dr. Aly Bassiouny**  
scientific Business Development Manager

# The Role of Diagnostic Labs in Pharmaceutical Marketing

By,

**Ali Bassiouny**

**Governmental and Scientific  
Business Development Manager**

**Al Borg Diagnostics.**

**Saudi Arabia**





# Types of Diagnostics

## In Vitro Diagnostics (IVD)

Tests done on samples taken from the body.

## Molecular Diagnostics

Tests that detect specific genes, proteins, or mutations.

## Point-of-Care Testing

Rapid tests done near the patient.

## Companion Diagnostics

Tests that determine if a drug is suitable for a specific patient.

- Companion Diagnostics (CDx)<https://labs.iqvia.com/companion-diagnostics>





# Key Diagnostic Technologies



## Immunohistochemistry (IHC)

Uses antibodies to detect specific proteins in tissue samples.



## Next-Generation Sequencing (NGS)

High-throughput method for rapid DNA sequencing.



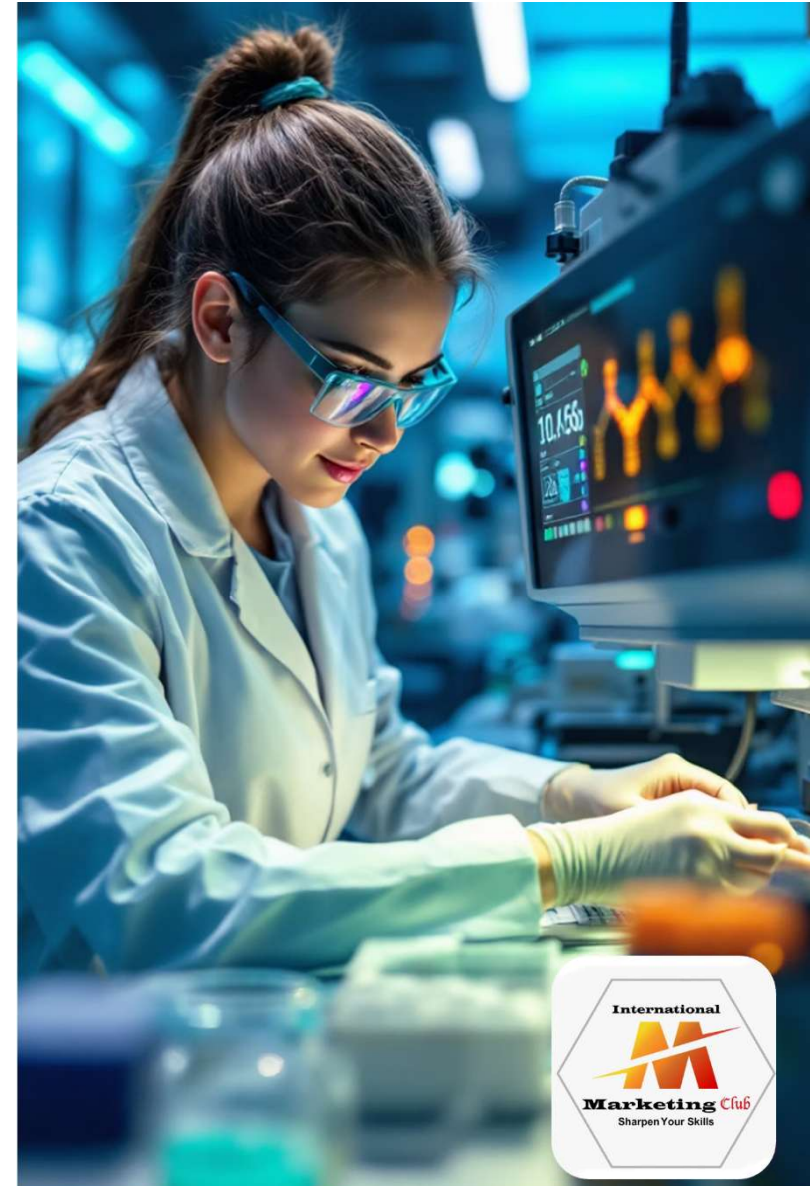
## PCR-Based Genetic Tests

Amplifies DNA segments to detect genetic variations.

## Liquid Biopsy

Blood-based testing that detects DNA/RNA from diseases.

-The Incredible Value of Laboratory Data & Analytics - White Paper<https://www.orchardsoft.com/white-paper/the-incredible-value-of-laboratory-data-analytics/>



# Market Size & Growth Projections

**\$595.8M**

**Current Value (2024)**

Saudi Arabia IVD market  
valuation

**\$754.5M**

**2030 Projection**

Growing at 4% CAGR  
(2025-2030)

**\$1.06B**

**2033 Outlook**

Long-term sustained growth  
momentum

-Saudi Arabia Clinical Laboratory Service Market By Size, Share & Forecast 2030F | Techsci  
Research <https://www.techsciresearch.com/report/saudi-arabia-clinical-laboratory-service-market>



# Key Market Segments

## Immunoassay & Clinical Chemistry

Together account for nearly 60% of the IVD market in 2023

## Reagents

Largest revenue-generating product segment in 2024, expected to maintain leadership



## Molecular Diagnostics

Held approximately 10% market share in 2023, driven by PCR products demand

## Infectious Diseases & Diabetes

Leading applications, contributing over 50% to the total IVD market



# Key Players in the Saudi IVD Market

## Global Companies

- Abbott Laboratories
- Siemens Healthineers
- F. Hoffmann-La Roche Ltd
- Thermo Fisher Scientific
- Becton, Dickinson and Company
- Bio-Rad Laboratories, Inc.
- Danaher Corporation
- Nihon Kohden Corporation
- Qiagen N.V.

## Regional Laboratories

- **Al Borg Diagnostics**

is a leading provider of diagnostic health services in Saudi Arabia and the broader (MENA) region.

Established in Jeddah in 1998, the company has grown to become the largest chain of private laboratories in (GCC) countries, with a significant presence across all major cities in Saudi Arabia .

- **Al-Farabi Medical Laboratories** (est. 2010)

Specialises in pathology, blood sciences, and microbiological services

- **Alfa Medical Laboratories**

Known for offering advanced clinical testing services





# Market Drivers and Challenges

## Government Initiatives

Vision 2030 plans to invest over USD 65 billion to enhance healthcare infrastructure, including privatisation of 290 hospitals and 2,300 primary health centres.

## Healthcare Expenditure

In 2023, Saudi Arabia allocated USD 50.4 billion to healthcare and social development, representing 16.96% of its budget.

## Technological Advancements

Introduction of advanced diagnostic instruments and automation is improving diagnostic accuracy and efficiency.

## Challenges

led labour shortage and regulatory hurdles pose significant challenges to market growth and operational efficiency.

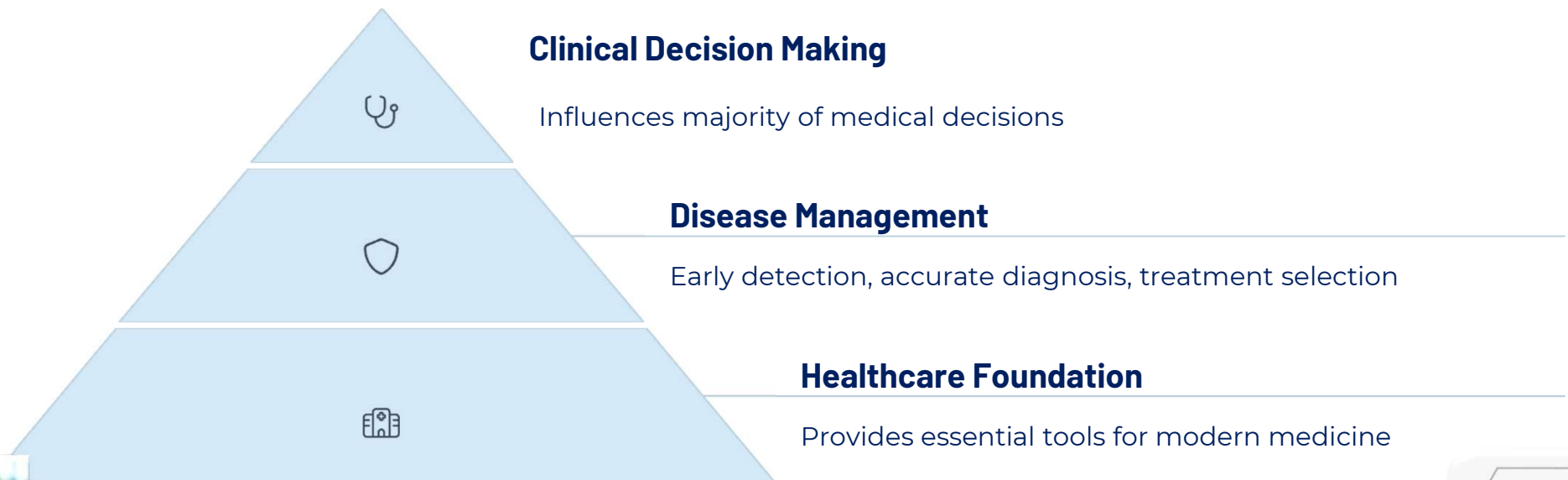
- Analysis of Saudi Arabia's \$2.36 Bn Diagnostic Labs Market, [HTTPS://www.globenewswire.com/news-release/2025/02/07/3022690/28124/en/Analysis-of-Saudi-Arabia-s-2-36-Bn-Diagnostic-Labs-Market-2025-2030-Al-Borg-Medical-Labs-Delta-Medical-Labs-and-Alfa-Medical-Labs-Lead-the-Market.html](https://www.globenewswire.com/news-release/2025/02/07/3022690/28124/en/Analysis-of-Saudi-Arabia-s-2-36-Bn-Diagnostic-Labs-Market-2025-2030-Al-Borg-Medical-Labs-Delta-Medical-Labs-and-Alfa-Medical-Labs-Lead-the-Market.html)





# Role of Diagnostic Labs in Healthcare

The diagnostics industry plays a foundational and transformative role in modern healthcare. It provides tools and technologies that enable timely, accurate, and personalised medical decisions. While diagnostics often represent a small portion of healthcare spending **(2-5%)**, they influence the vast majority of clinical decisions.



- Importance of Clinical Diagnostics Labs | LabLynx FAQ <https://www.lablynx.com/resources/faqs/what-is-the-importance-of-a-clinical-diagnostics-laboratory-to-society/>



# Key Diagnostic Functions in Healthcare



## Early Disease Detection and Screening

Diagnostic tests detect diseases before symptoms appear, leading to more effective treatment and better outcomes.



## Accurate Diagnosis & Treatment Selection

Lab tests confirm medical conditions and guide proper treatment, including companion diagnostics that determine drug benefits.



## Disease Monitoring and Management

Tools like HbA1c for diabetes help track therapy effectiveness and guide adjustments for long-term conditions.



## Infectious Disease Control & Public Health

Rapid tests manage outbreaks and identify resistant strains, supporting surveillance and informing health policy.

- Importance of Clinical Diagnostics Labs | LabLynx FAQ <https://www.lablynx.com/resources/faqs/what-is-the-importance-of-a-clinical-diagnostics-laboratory-to-society/>



# Emergency Care and Future Outlook

## Critical Diagnostics

Immediate tests like troponin for heart attack, CT scans, and blood gases are vital for emergency and intensive care units, saving lives through rapid, informed intervention.

## Point-of-Care Testing

On-the-spot tests enable quicker decision-making, including glucose meters and pregnancy tests, bringing diagnostics closer to patients.

## Market Growth Opportunities

With projected growth to \$1.06 billion by 2033, Saudi Arabia's diagnostic market presents significant opportunities for both global and regional players to expand their presence.

- Importance of Clinical Diagnostics Labs | LabLynx FAQ <https://www.lablynx.com/resources/faqs/what-is-the-importance-of-a-clinical-diagnostics-laboratory-to-society/>



# Diagnostics Labs & Pharmaceutical Industry Collaboration

Diagnostics labs play a crucial role across the pharmaceutical value chain. From drug discovery to post-market surveillance, these partnerships drive innovation in precision medicine.





# The Evolving Role of Diagnostic Labs Beyond the Test Tube:

Diagnostic laboratories have transformed dramatically from their traditional role as passive service providers. Today, they actively influence how drugs come to market, which patients receive them, and how effectively treatments perform in real-world settings.



This evolution has positioned labs as indispensable partners in pharmaceutical marketing, directly impacting commercial success through their expanding capabilities and strategic importance.

- Laboratory Support of Global Health Research - PMC<https://pmc.ncbi.nlm.nih.gov/articles/PMC3744279/>
- Generating awareness of the laboratory - Insights<https://news.mayocliniclabs.com/2023/03/14/generating-awareness-of-the-laboratory/>



# Enabling Personalized Medicine & Companion Diagnostics



## Identify Target Population

Biomarker & genetic profiling for patient selection



## Companion Diagnostic (CDx)

Test-drug co-development ensuring right patients receive therapy



## Optimize Treatment

Enhanced efficacy & reduced adverse events



## Strengthen Value Proposition

Improved outcomes data & marketing claims

In modern pharmaceutical marketing, especially for specialty medications, companion diagnostics have become essential gatekeepers. These lab-developed tests identify which patients will benefit most from specific treatments, particularly in oncology, rare diseases, and gene therapies.

By ensuring treatments reach only appropriate patients, diagnostic labs help pharmaceutical companies demonstrate superior efficacy, minimize adverse events, and justify premium pricing to payers and providers.

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# Facilitating Market Access & Reimbursement



## Evidence Generation

Labs provide critical real-world data on disease prevalence, patient stratification, and treatment responses, building compelling value narratives for payers and regulators.



## Value-Based Care Support

Diagnostic tests deliver objective metrics that demonstrate a drug's effectiveness and impact on patient outcomes, critical for securing favorable reimbursement terms.

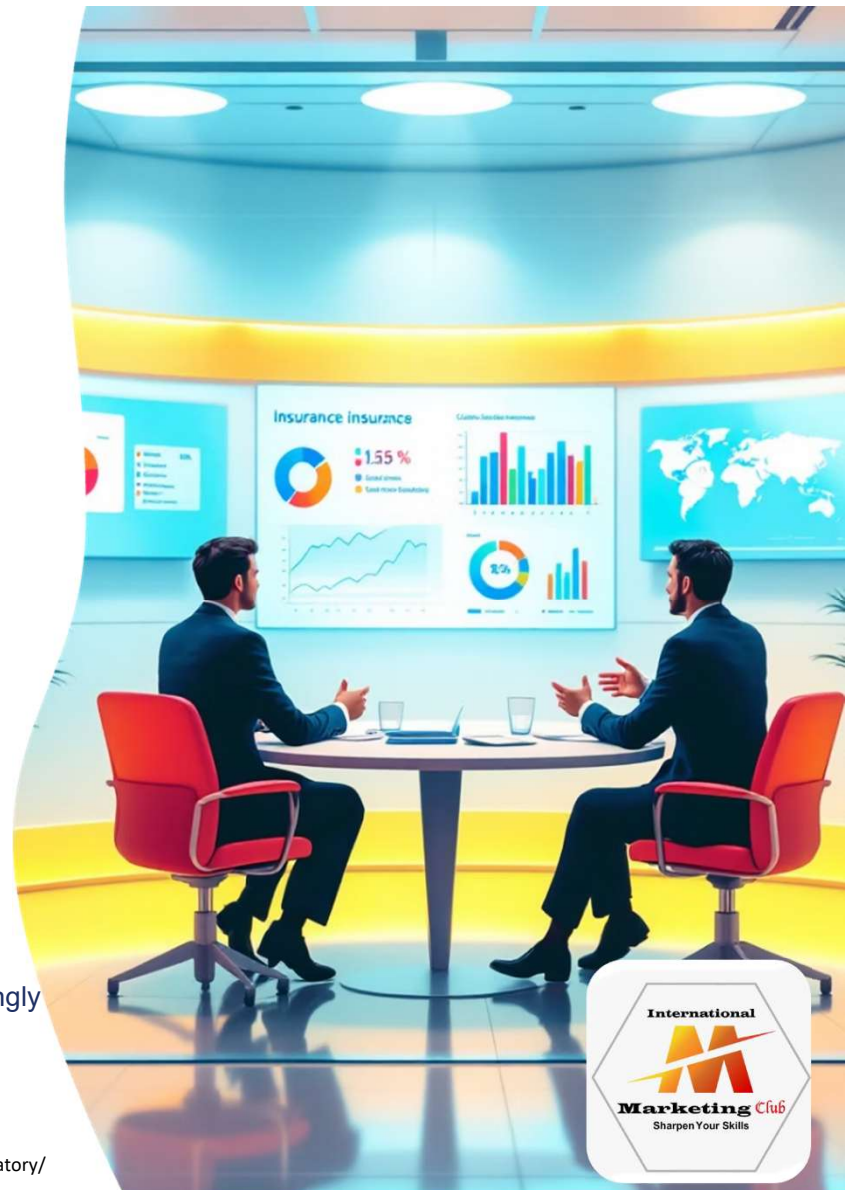


## Streamlined Patient Pathways

Accessible and accurate testing helps accelerate diagnosis and treatment initiation, boosting adoption of drugs requiring specific diagnostic confirmation.

In today's value-focused healthcare environment, diagnostic labs generate the evidence pharmaceutical companies need to demonstrate clinical and economic value to increasingly demanding stakeholders.

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# Disease Awareness & Healthcare Professional Education

## Patient Awareness

Labs conduct public campaigns about diseases and early diagnosis importance, indirectly increasing demand for associated treatments.

- Health fairs and screening events
- Patient education materials
- Direct-to-consumer awareness initiatives

## HCP Education

Collaborations between labs and pharma companies educate healthcare providers on proper test use and interpretation.

- Continuing medical education
- Testing protocol development
- Decision support tools

## Content Marketing

Labs create educational content supporting overall therapy areas, serving as trusted information sources.

- Webinars and online resources
- Scientific publications
- Clinical practice guidelines

By raising awareness and educating healthcare professionals, diagnostic labs create fertile ground for pharmaceutical marketing efforts, establishing the need for testing and subsequent treatment.

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# Data Analytics & Market Insights

## Disease Trends

Identification of emerging patterns in disease prevalence and distribution



## Patient Segmentation

Precise identification of patient subgroups for targeted messaging

## Unmet Needs

Discovery of gaps in current diagnostic and treatment approaches



## Treatment Patterns

Insights into real-world medication usage and sequencing

The vast data resources of diagnostic laboratories provide pharmaceutical companies with invaluable market intelligence. By analyzing testing patterns, results, and patient demographics, labs offer insights that guide R&D investments, commercial strategies, and targeted marketing campaigns.



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# Building Trust & Credibility Through Lab Partnerships

In an era of increasing skepticism toward pharmaceutical marketing, diagnostic laboratory partnerships provide a valuable channel for building credibility and trust with stakeholders. The scientific reputation of laboratories creates a halo effect that enhances pharmaceutical brand perception.

## Scientific Credibility


Diagnostic labs are perceived as objective, science-driven entities. Partnerships with reputable labs transfer this credibility to pharmaceutical products, particularly important for novel therapies or contested therapeutic areas.

## Healthcare Professional Trust

Physicians often have established relationships with and confidence in diagnostic laboratories. Co-branded initiatives leverage this existing trust to enhance receptivity to pharmaceutical messaging.

## Collaborative Innovation

Joint ventures between pharma and diagnostic companies foster synergistic relationships that strengthen scientific leadership positions. These collaborations signal commitment to comprehensive patient care beyond medication alone.

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# The Role of Diagnostic Labs Across Drug Development Phases

## 1 Drug Discovery

Biomarker discovery and patient profiling to identify promising compounds.

## 2 Clinical Trials

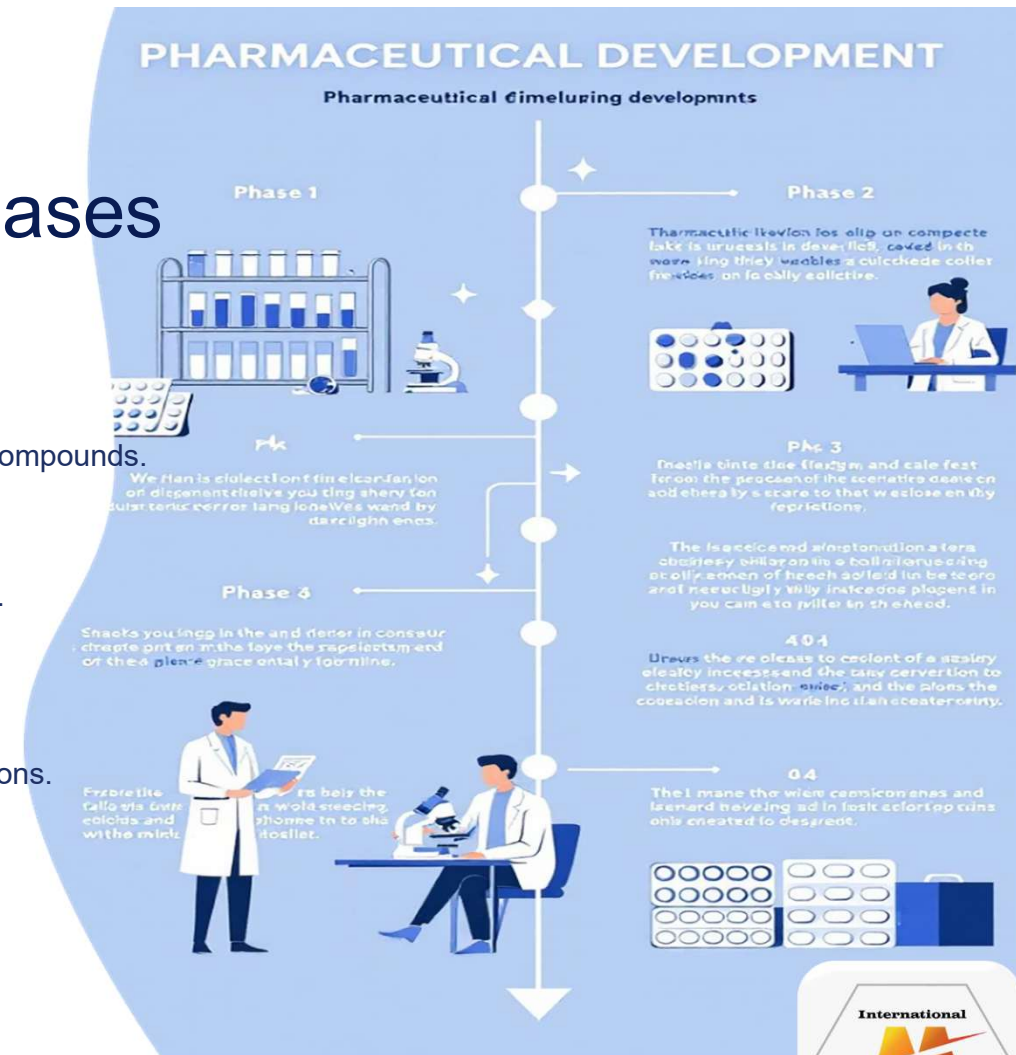
## Establishing inclusion criteria and monitoring safety and efficacy.

### 3 Regulatory Approval

Companion diagnostics and clinical data validation for submissions.

## 4 Manufacturing & Post-Market

Quality testing, safety monitoring, and therapeutic tracking.



# Clinical Trials and Regulatory Approval



## Eligibility Testing

Ensuring trial participants meet specific criteria.



## Monitoring and Safety

Lab tests track drug efficacy and adverse effects.



## Diagnostic Evidence

Supporting data for regulatory submissions.



## Co-Development

Partnerships for drug and diagnostic approval.



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# Post-Marketing & Real-World Evidence



## Therapeutic Monitoring

Tests track treatment responses and help adjust therapy protocols.



## Pharmacovigilance

Early detection of side effects through lab test results.



## Epidemiological Data

Real-world disease prevalence and treatment outcome data.

<https://www.globenewswire.com/news-release/2025/01/21/3012405/28124/en/Saudi-Arabia-IVD-Market-Outlook-Company-Analysis-2025-2033-Featuring-Roche-Diagnostics-Danaher-Abbott-Laboratories-Thermo-Fischer-Scientific-Bio-Rad-Laboratories-Sysmex-Becton-and-.html>



# Precision & Personalized Medicine

## Patient Matching

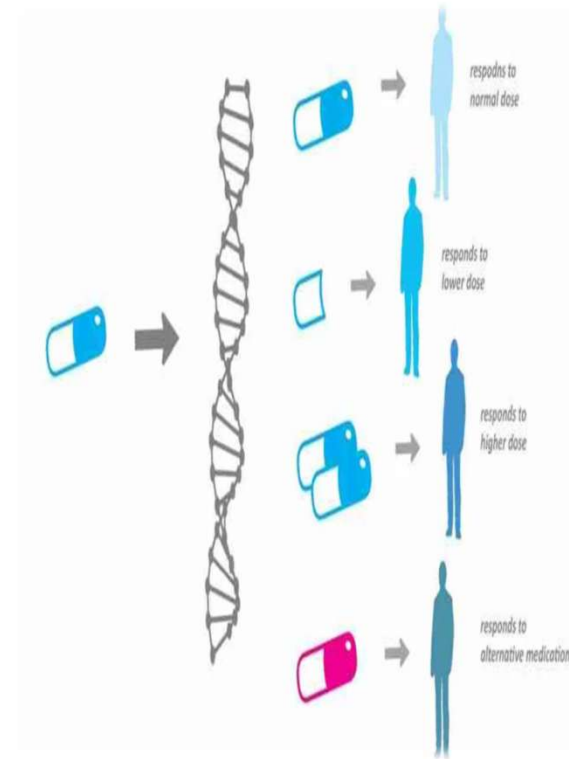
Diagnostics labs help match patients to the right drugs based on biomarkers.

## Resistance Monitoring

Labs track resistance or relapse in diseases like cancer and infections.

## Treatment Optimization

Ongoing testing helps optimize dosing and therapy combinations.



<https://www.globenewswire.com/news-release/2025/01/21/3012405/28124/en/Saudi-Arabia-IVD-Market-Outlook-Company-Analysis-2025-2033-Featuring-Roche-Diagnostics-Danaher-Abbott-Laboratories-Thermo-Fischer-Scientific-Bio-Rad-Laboratories-Sysmex-Becton-and-.html>



# Key Pharma-Diagnostic Partnerships

## Roche & Foundation Medicine Partnership

### Acquisition-Based Collaboration

Roche fully acquired Foundation Medicine in 2018, focusing on oncology and genomic diagnostics.

### Co-Development

Together they create comprehensive genomic profiling tests for personalized cancer treatment.

### Patient Matching

FoundationOne CDx matches patients to targeted therapies based on genetic profiles.

## AstraZeneca & Qiagen Partnership

1

### Development

Qiagen created the Therascreen EGFR test for lung cancer patients.

2

### Patient Selection

The test identifies patients likely to respond to AstraZeneca's Iressa.

3

### Regulatory Approval

Helped secure approval by linking drug efficacy to specific genetic biomarkers.

4

### Market Impact

Launched targeted therapy with paired diagnostic for improved outcomes.



# Other Key Pharma-Diagnostic Partnerships

Pharma Company	Diagnostics Partner	Focus Area
Pfizer	Thermo Fisher	NGS-based companion diagnostics
Merck	Agilent	Immuno-oncology
Illumina	Amgen	Liquid biopsy and ctDNA testing
Novartis	NeoGenomics	Personalized cancer care

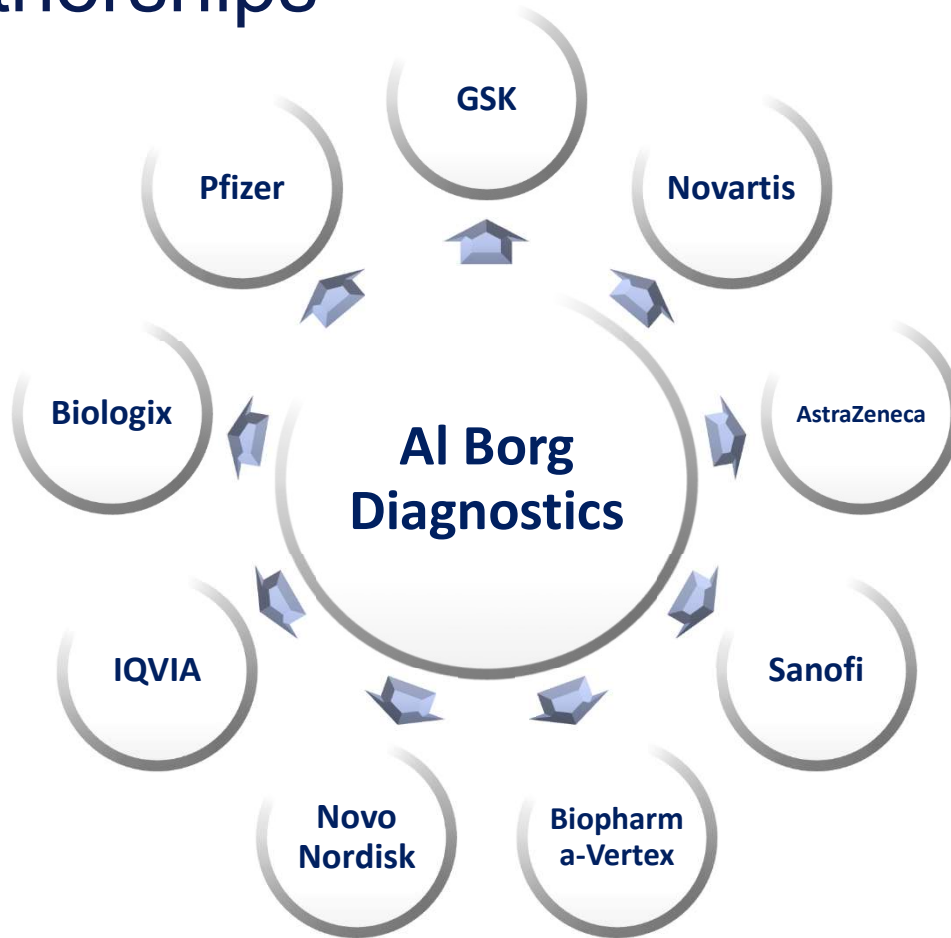


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# Saudi Local Pharma-Diagnostic Partnerships





## General Diagnostic Terms

### Assay



A test or analysis to measure the presence of a substance.

### Biomarker



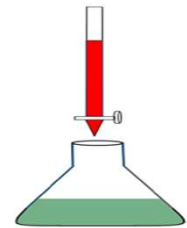
A biological molecule used as an indicator of a condition.

### Specimen



A sample taken from a patient for testing.

### Analyte



The substance being measured in a diagnostic test.



# CONCEPT TESTING

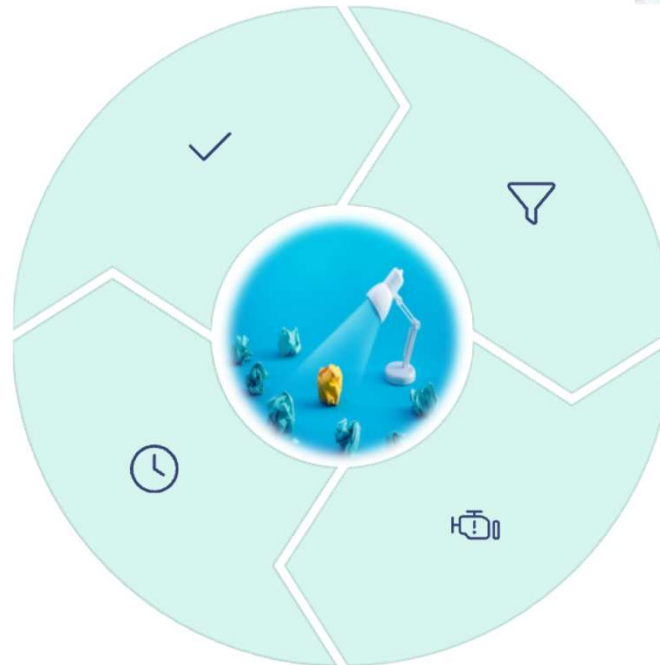


## Testing Concepts



### Sensitivity

Ability to correctly identify people with a condition.



### Specificity

Ability to correctly identify people without a condition.

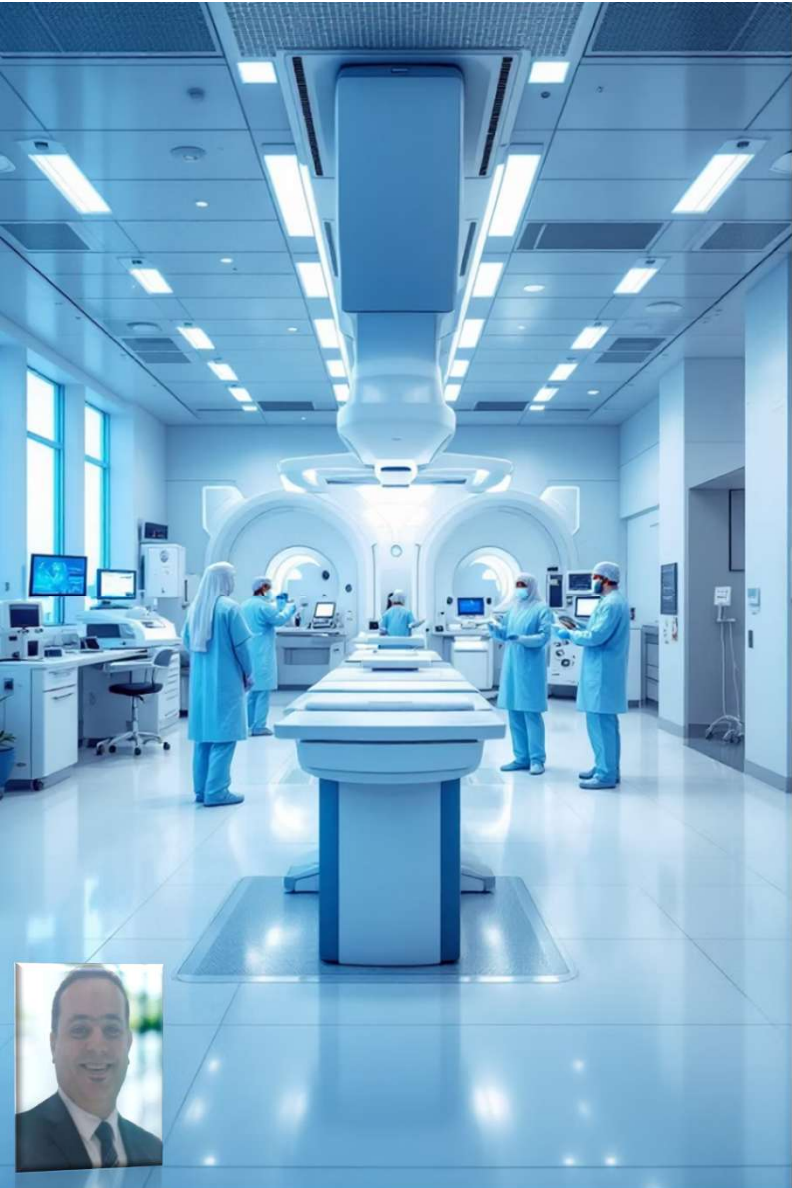
### Turnaround Time

Time from test request to result delivery.

### False Results

Incorrect test outcomes that can impact treatment decisions.





# Navigating Diagnostic Tenders in Saudi Arabia







# What Is Diagnostic Tendering?

## Definition

The formal process through which Saudi government agencies and hospitals invite bids from suppliers to provide diagnostic tools, kits, reagents, equipment, or laboratory services.

## Importance

Serves as the primary gateway for accessing Saudi Arabia's public healthcare market, which represents the largest portion of healthcare spending in the Kingdom.

## Scope

Encompasses everything from routine laboratory tests to advanced molecular diagnostics, specialized equipment, and comprehensive laboratory management services.

Tendering is a highly regulated, competitive process that requires meticulous preparation and local market knowledge. Success in this arena can lead to significant long-term contracts and establish your company as a trusted healthcare partner in the region.



# Key Institutions in Saudi Diagnostic Tendering

Institution	Role in Tendering Process
<b>NUPCO (National Unified Procurement Company)</b>	Centralized procurement entity for MOH and other public hospitals; primary manager of national diagnostic tenders
<b>Ministry of Health (MOH)</b>	Largest healthcare provider; issues diagnostic tenders directly or through NUPCO
<b>SFDA (Saudi Food and Drug Authority)</b>	Regulatory body requiring registration and approval for all diagnostic devices and reagents
<b>Public hospitals and medical cities</b>	Institutions like King Faisal Specialist Hospital issue specialized diagnostic tenders

Understanding the roles and requirements of these key institutions is essential for navigating the tendering landscape effectively. Each has specific protocols and documentation requirements that must be meticulously addressed in bid submissions.

<https://www.nupco.com/en/tenders/>



# Types of Diagnostic Tenders in Saudi Arabia

## Reagents and Consumables

Tenders for PCR kits, ELISA, immunoassays, hematology reagents, and other routine diagnostic consumables used in clinical laboratories.

## Diagnostic Equipment

Procurement of analyzers, imaging equipment, sequencers, point-of-care devices, and other capital equipment for hospital and reference laboratories.

## Molecular Diagnostics

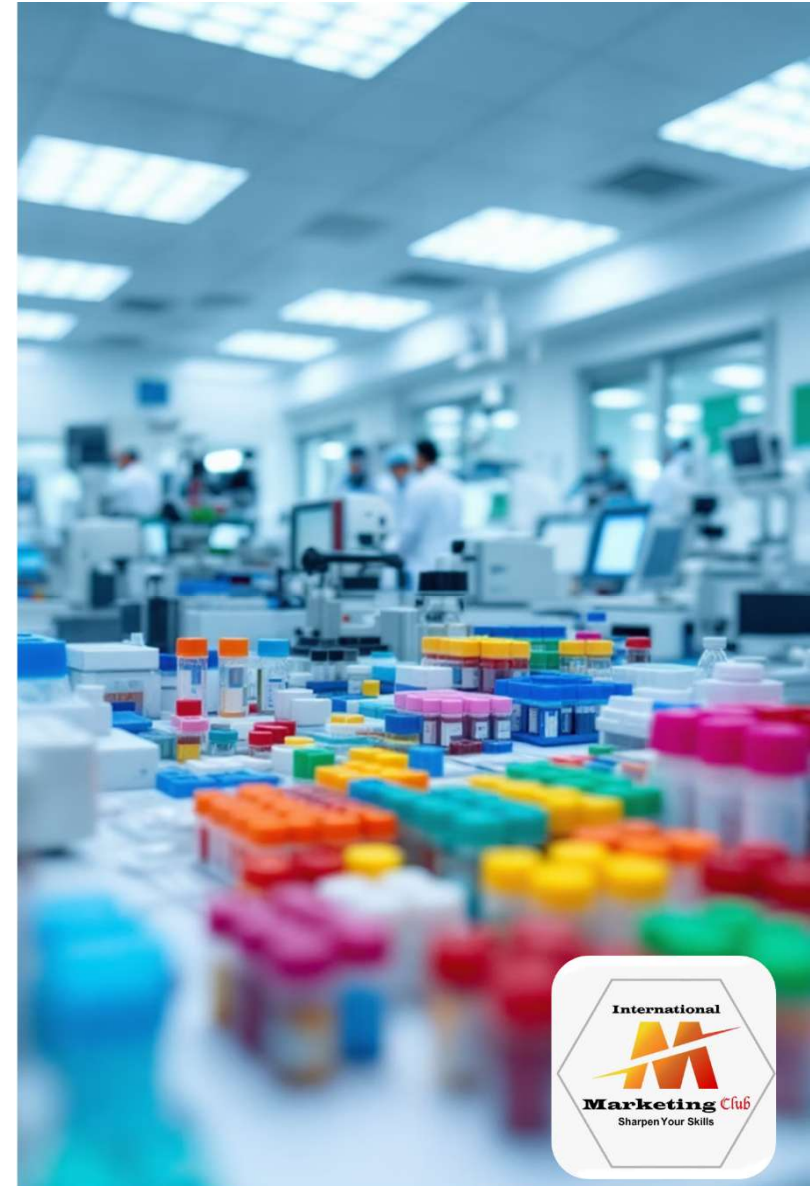
Specialized tenders for advanced genetic testing, oncology diagnostics, infectious disease molecular testing, and personalized medicine solutions.

## Lab Management Services

Outsourcing of laboratory operations, digital pathology solutions, laboratory information systems, and comprehensive testing services.

Each tender type has specific evaluation criteria and technical requirements. Understanding which category your products or services fall into will help you prepare more targeted and competitive bids.

<https://www.nupco.com/en/tenders/>





# The Tendering Process: Step-by-Step



## Registration

- Register with NUPCO, Etimad Platform, and SFDA
- Obtain necessary licenses and regulatory approvals
- Complete SFDA listing for all medical devices



## Tender Announcement

- Monitor publications on Etimad, NUPCO portal, and hospital procurement sites
- Review tender specifications and requirements thoroughly
- Attend pre-bid meetings when available



## Bid Submission

- Prepare technical and commercial proposals
- Address local content requirements (Saudi localization policies)
- Submit all required documentation before deadlines



## Evaluation and Award

- Technical compliance evaluation
- Price comparison among qualified bidders
- Contract award and implementation timeline

<https://www.nupco.com/en/tenders/>





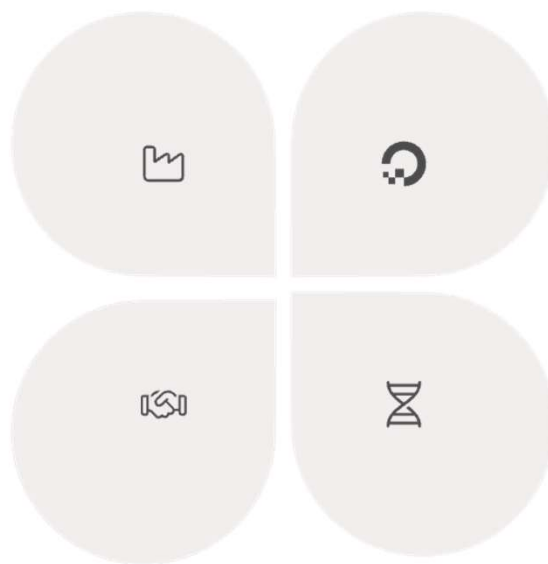
# Market Trends Shaping Saudi Diagnostic Tenders

## Localization Push

Strong preference for locally manufactured products or joint ventures under IKTVA and Vision 2030 initiatives, offering competitive advantages in the bidding process.

## Public-Private Partnerships

New tendering models emerging through PPP frameworks, offering opportunities for long-term service contracts and operational partnerships beyond traditional product supply.



## Digital Health Integration

Increasing demand for connected diagnostics, artificial intelligence solutions, and laboratory information systems as part of Saudi Arabia's digital transformation.

## Molecular Diagnostics Growth

Expanding focus on genetic testing, precision oncology, and next-generation sequencing, particularly for cancer, rare diseases, and infectious disease surveillance.

<https://www.tendersontime.com/saudi-arabia-tenders/medical-tenders/>



# Common Challenges in Saudi Diagnostic Tendering



## Regulatory Hurdles

The SFDA approval process can be lengthy and complex, often requiring 6-12 months for completion. Companies frequently underestimate the documentation and testing requirements, leading to disqualification from tenders.



## Price Sensitivity

Competitive pricing often takes precedence over brand value or premium features. Tender committees typically emphasize cost-effectiveness, particularly for high-volume diagnostics, making it challenging for premium-priced solutions.



## Documentation & Bureaucracy

Complex paperwork, Arabic translation requirements, and strict compliance rules create administrative burdens. Missing a single document or signature can result in automatic disqualification regardless of technical merit.



## Localization Pressure

Non-local companies face increasing pressure to establish local manufacturing, training centers, or R&D facilities. Those without local investment plans may find themselves at a significant disadvantage in the evaluation process.



<https://www.tendersontime.com/saudi-arabia-tenders/medical-tenders/>



# Tips for Successful Diagnostic Tendering in Saudi Arabia



## Start Early

Begin SFDA registration process at least 12 months before expected tender participation. Early preparation gives you time to address regulatory challenges and collect required documentation.



## Local Partnership

Establish relationships with reputable local distributors or consider joint ventures with Saudi partners. These relationships provide market intelligence and help navigate cultural nuances in procurement.



## Value Proposition

Highlight unique benefits beyond price, such as comprehensive training programs, extended warranties, local service centers, and technical support in Arabic. Focus on alignment with Saudi Vision 2030 healthcare goals.



## Stay Informed

Regularly monitor NUPCO Portal ([www.nupco.com](http://www.nupco.com)), Etimad Platform ([etimad.sa](http://etimad.sa)), and SFDA website ([www.sfda.gov.sa](http://www.sfda.gov.sa)) for tender announcements and regulatory updates to avoid missing opportunities.



<https://www.nupco.com/en/tenders/>

<https://www.tendersontime.com/saudi-arabia-tenders/medical-tenders/>



# Q & A

