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# Middle East & Africa Pharmaceutical Market Insights

*Fourteenth Edition*

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Analytical Timeframe:

MAT March 2019

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# Market insights snapshot for MAT Q1 2019: Growth revived in many large markets mainly in Institutional channel



**Retail channel** continues to dominate the MEA market with ~69% (\$17.6 B) share in value sales and 75% (5.7 B Units) in volume in MAT Q1 2019. It has grown at 7% PPG in both value and volume. **Tender channel** has grown fast at 15% PPG in value and volume sales driven by its growth in **RSA (24%), Egypt (18%) and KSA (13%)**



Market has reached \$25.6 B value and 7.7 B Units. Value sales growth has been at **9% PPG<sup>1</sup> (Previous Period Growth) and 8% CAGR<sup>2</sup>** while Volume sales growth has increased at **9% PPG and at 4% CAGR**



While **MNCs** dominate the MEA market with 62% share in total value sales, local companies have grown faster at 11% PPG in value and 12% in volume. **Hikma, Tabuk and Aspen** are the top 3 local companies which grew at 20%, 5% and 10% PPG respectively. Local companies **Salem Diagnostics, Generic Healthcare and MNC Gruenthal** are the fastest growing companies in **Algeria, FWA and Kuwait**



**Sanofi, Novartis and Pfizer** continue to be the top selling corporations in MEA together generating additional ~\$380Mn in value in 2019. **Pharmalliance** is the fastest growing corporation growing at 58% PPG in Algeria



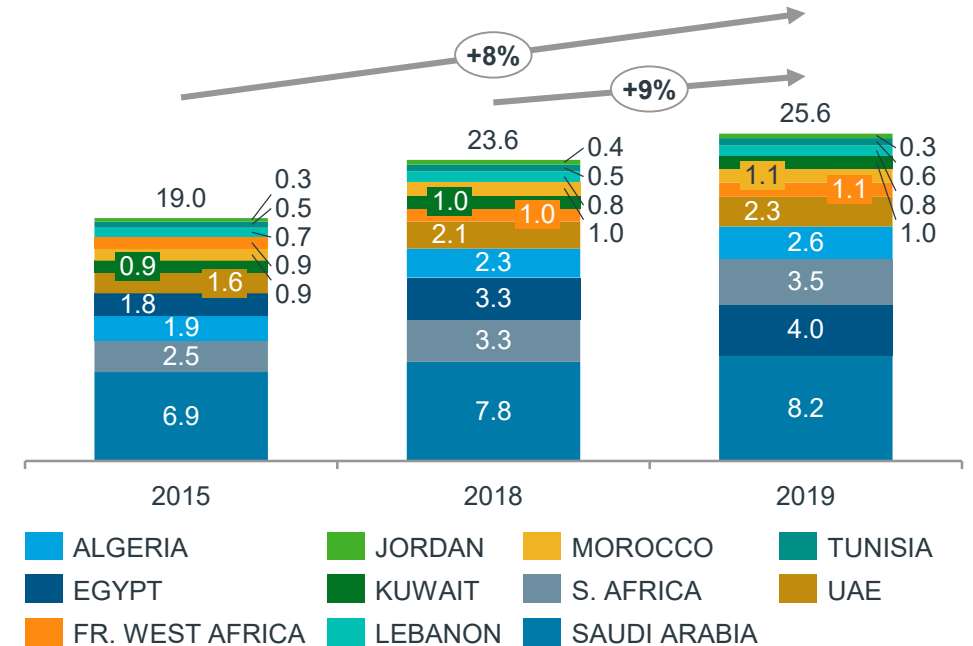
**Alimentary tract** is the top selling TA holding 18% of the market share with the highest growth in **Egypt (29% PPG) and Tunisia (18% PPG)** followed by **Algeria (18% PPG)**. **Lantus (insulin glargine), Nexium (Esomeprazole) and Novorapid (insulin aspart)** are the leading Alimentary tract products growing at 10%, 6% and 19% PPG respectively

1. PPG: Previous Period Growth: MAT Q1 2019 vs. MAT Q1 2018 growth

2. CAGR: Compound Annual Growth Rate for the period MAT Q1 2015 to MAT Q1 2019

3. Fastest growing corporations (by PPG) with value greater than \$USD 50 million

Source: IQVIA Audited Data, MAT Q1 2019, includes IQVIA private, LPO, institutional data where available; Value sales at ex-factory price level without discount; Egypt sales at constant exchange rate and don't account for any currency fluctuation or devaluation; \*Egypt real growth at variable exchange rate is 24%



- The MEA market has reached **\$26B** in value, growing at **8%** CAGR; short term growth stood at **9%** from 2018 to 2019
- Saudi Arabia, the largest market in MEA at **\$8.2B** in value, grew at **6%** in value terms. Egypt, Algeria and UAE are other large markets that had double digit growth

# Among the key markets, Egypt saw highest growth at 24%, followed by Algeria at 12%



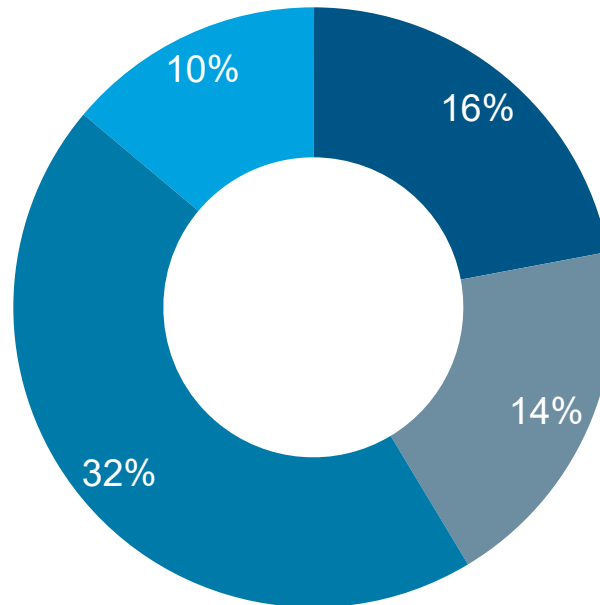
## Algeria (ALG)

- Algeria Retail market is valued at **\$2.5 B in value growing at 12.4% PPG**. **Alimentary TA** leads the market with **23% share** in total sales and **106** new launches generating **~\$3.6 Mn** in 2019
- Sanofi** is the leading corporation with 13% share in sales and its **Lantus** is the top selling product in Algeria growing at 26% PPG
- Salem Diagnostic** is the fastest growing corporation with **\$35 Mn sales** in 2019 growing at 2249% PPG



## Saudi Arabia (KSA)

- KSA Retail and Inst. market is valued at **\$8.2 B growing at 6% PPG and 4% CAGR** accounting for 32% share in total MEA sales
- Retail channel** covers 44% share sales however it has lost **~\$70 Mn** over last MAT. Institutional and LPO channels have grown at 13% PPG each
- Pfizer, Sanofi and Novartis** are top 3 corporations together accounting for 19% market share. Pfizer and Sanofi grew at 5% and 28% while Novartis lost 6% sales last year
- MSD** became the fastest growing corporation owing to **Januvia(sitagliptin) and Rotateg's (Rotavirus Vacc)** exponential growth of 121% and 6189% PPG



## Egypt (EGY)

- Egypt Total market is valued at **\$4 B and 3.4 B in volume** growing at 24% PPG in value
- Alimentary TA** leads the market with **20% share** growing at 29% PPG and 61 new launches in 2019
- Novartis with \$327 Mn sales** in 2019 is the leading corporation followed by local company **Pharco** which is valued at \$231 Mn
- GSK** has 3 products among the top 10 while **Nestle** is the fastest growing corporation at \$40 Mn growing at 110% PPG



## South Africa (RSA)

- South Africa Total market is valued at **\$3.5 B and is the 3<sup>rd</sup> largest** market in MEA after KSA and Egypt. **Tender channel** has grown fast at 24% PPG while Retail has grown by only 3% over last MAT
- Top 3 positions are occupied by local/regional corporations like **Aspen, Adcock Ingram and Cipla** which together account for 27% of total RSA market
- Mylan's Atroiza(Efavirenz+Emtricitabine+Tenofovir Disoproxil)** is the top selling brand with **\$50 Mn sales** in 2019 however it lost **~\$29 Mn (37%)** over last year

Source: IQVIA Audited Data, MAT Q1 2019, includes IQVIA private, LPO, institutional data where available; Value sales at ex-factory price level without discount; Egypt sales at constant exchange rate and don't account for any currency fluctuation or devaluation, however real growth at variable exchange rate is -4%

Note 1: South Africa Retail includes data from Distributors, Wholesalers, Direct sales from Manufacturers, Buying groups covering nearly 86% of the market, excluding Public Hospitals. | Overall South Africa market includes Retail and State Sector data | Growth in State Sector includes direct to state deliveries, retrospective data addition and some direct buy outs from State Hospitals in 2018

b. : Base period MAT Q1 2018 Sales

# UAE grew at 10% with its Retail market growth at 7%; Kuwait sales dropped by 4% PPG in value and by 10% in volume



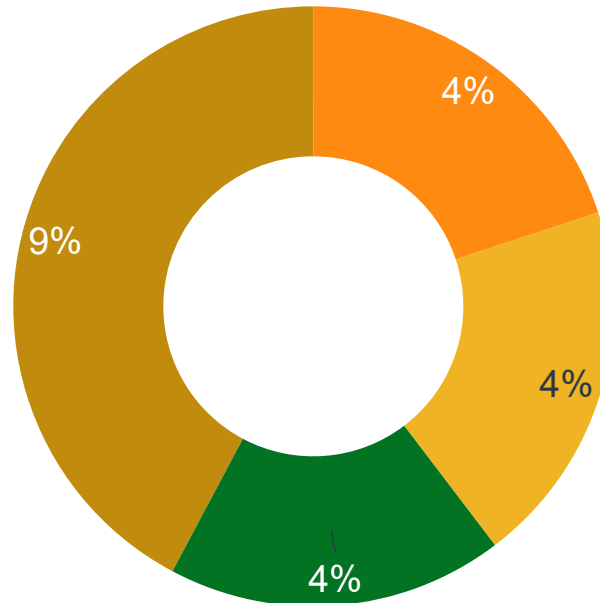
## United Arab Emirates (UAE)

- UAE Retail and LPO market is valued at **\$2.3 Bn** growing by **10%** over last MAT. **Retail** channel is dominant having 77% share growing by 7% while **LPO** channel grew at 19% PPG
- MNCs dominate the market with 79% share in total sales. **Novartis, GSK and AZ** are the top 3 corporations occupying 20% of sales in the UAE
- **Pfizer's Lipitor(atorvastatin)** is the top selling brand at \$46 Mn in 2019 however **Nestle's Cetaphil** grew faster at 58% PPG making it the fastest growing corporation



## Kuwait (KUW)

- Kuwait Retail and LPO market is valued at **~\$1 B in value and 70 Mn in volume** with declining value and volume sales at 4% and 10% PPG respectively
- **MNCs dominate** the market with all top 10 corporations being MNCs. **Pfizer** leads with 10% share growing at 15% PPG. **GSK and MSD** also feature among top 10 however they lost 13% and 38% sales over last MAT
- **Humira(adalimumab) and Lipitor(atorvastatin)** continue to be top selling brands, **Novo Nordisk's Nordotropin** experienced exponential growth of 890% during 2018-19



## Fr. West Africa (FWA)

- FWA Retail market is valued at **\$1 B in sales and 463 Mn in volume** growing at 5% in value and 6% in volume sales
- **Anti-infectives and Alimentary** are top 2 TAs with 17% market share each together generating additional sales of \$18 Mn in 2019
- 8 out of top 10 corporations are MNCs with **Sanofi** leading the market having 9% share valued at \$103 Mn
- **Paracetamol brands Efferalgan (\$31 Mn) and Doliprane (\$17 Mn)** are the top 2 brands growing at 2% and 10 % PPG respectively



## Morocco (MOR)

- Morocco Retail market is valued at **\$1 B in 2019 growing at 6% PPG**. **Alimentary TA** leads with 18% share generating additional ~\$12 Mn sales over last MAT
- **Sanofi** valued at \$92 Mn is the top selling corporation with **Surgam(tiaprofenic acid)** featuring among top 10 products in 2019
- **GSK's Augmentin (amoxi+clavu)** continues to be the top selling brand with \$22 Mn sales in 2019
- **J&J** is the fastest growing corporation with the introduction of **Eprex (epoetin alfa)** which generated \$1 Mn sales in 2019

Source: IQVIA Audited Data, MAT Q1 2019, includes IQVIA private, LPO, institutional data where available; Value sales at ex-factory price level without discount; Egypt sales at constant exchange rate and don't account for any currency fluctuation or devaluation, however real growth at variable exchange rate is -4%

b. : Base period MAT Q1 2018 Sales

# Lebanon and Jordan markets declined by 0.4% and 6% while Tunisia market grew at 12% PPG in value



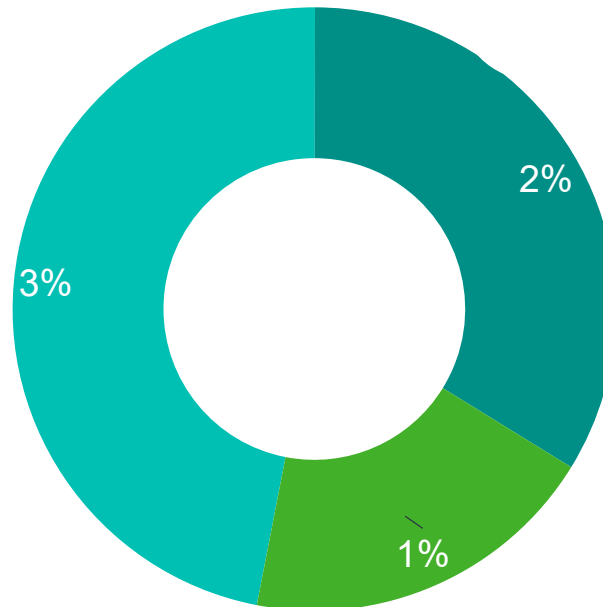
## Lebanon (LEB)

- The Lebanese Retail market declined at **-0.4% PPG**, driven by price cuts in 2019, to reach **\$0.8Bn sales**; top 10 corporations comprise 42% of the total sales in Lebanon which include 2 local/regional companies
- **Alimentary and Cardiovascular** are the top 2 TAs together accounting for **36% market share** in 2019
- **GSK's Panadol(paracetamol)** leads the market with **\$12Mn sales** followed by **AZ's Nexium** which lost 14% (\$1.3 Mn) over last MAT



## Jordan (JOR)

- Jordan Retail market remained at **~\$0.3Bn sales**, but lost nearly 6% of its sales over last MAT, driven by drop in sales of Anti-bacterials and Non therapeutics
- **Alimentary and Anti-infectives** are the top 2 TAs accounting for 32% of total Jordan sales however they together lost **~\$10 Mn** over last MAT
- **Hikma** is the leading corporation however it lost 13% sales last year. **Menarini** is the fastest growing corporation growing at 28% PPG
- 6 out of top 10 brands experienced decline in sales with major decline of **19% for Hikma's Amoclan (amoxi+clavu)**



## Tunisia (TUN)

- Tunisia Total market has grown at 12% PPG to reach **\$0.6Bn sales**. Retail channel dominates with 70% market share generating **~\$414 Mn** in 2019
- **Sanofi, Medis** and **Novartis** are the top selling corporations, however, **Sanofi (b. \$51M)** lost around 5% of its sales in 2019
- **GSK's Augmentin (Amoxi+Clavu)** is the top selling brand growing at 12% PPG
- **Mylan (290% PPG)** is the fastest growing corporation owing to introduction of **Trastumab** which generated **~\$5 Mn** in 2019

Source: IQVIA Audited Data, MAT Q1 2019, includes IQVIA private, LPO, institutional data where available; Value sales at ex-factory price level without discount; Egypt sales at constant exchange rate and don't account for any currency fluctuation or devaluation, however real growth at variable exchange rate is -4%

b. : Base period MAT Q1 2018 Sales

# Herewith the results of our MEA market survey we conducted last quarter

We asked 3 questions pertinent to MEA market and received inputs from more than 170 experts from MEA region for each survey question

Which country is expected to have highest potential for biosimilar products planned to enter in next 2-3 years



- **KSA and Egypt** have been identified as countries with highest biosimilar potential by 34% and 19% of respondents respectively

Which key innovative therapy areas face the highest challenge in market access from a regulatory perspective?



- **Targeted Oncology** has been identified as the most challenging therapy area to gain access from Regulatory perspective
- **Respiratory** products have been seen to be more favorable

Which country do you believe require significant changes in insurance landscape for more efficient and profitable Pharma business?



**Algeria** has been identified as the country that most needs changes in insurance landscape

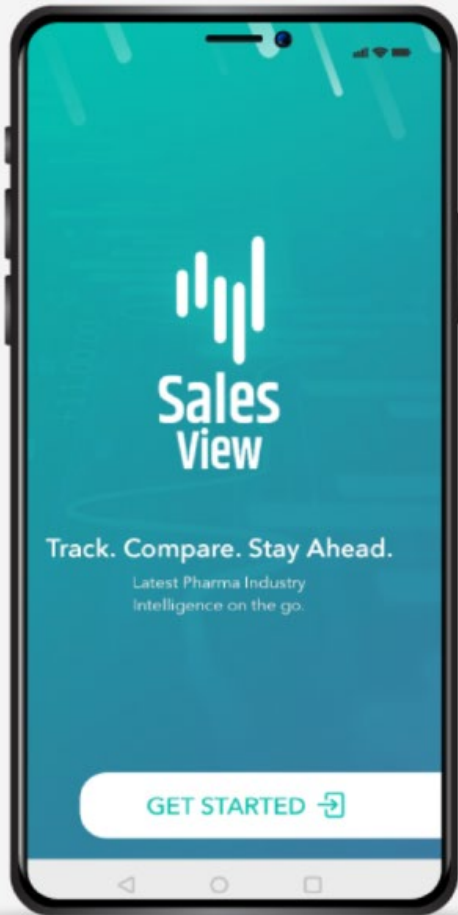
Source: IQVIA Market Survey

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# We have launched IQVIA Sales View – A Learning & Business Intelligence App for Pharma Industry



Latest pharma industry competitive intelligence on your fingertips



Benefits from IQVIA's deep intelligence pool on pharmaceutical industry



Capability building feature for pharma professionals



**MEA reports are also available on IQVIA Sales View app**

Available on



# IQVIA's Commercial Analytics Services provide solutions from Pre-Launch phase to Maturity phase of a product

## *Solutions for key areas across the Product Lifecycle*



# We have also developed a robust Patient level database for Dubai, providing critical insights at higher granularity

## *Anonymous Patient Level Data*

### STANDARD OFFERINGS

- Patients on Drug
- Dosage
- Compliance
- Persistency
- Patients by Specialty
- Source of Business
- Co-Medication
- Line of Treatment

- Time Period: Jan'14 – May'18\*\*
- 8.5~ MM Patients (De-Identified)\*
- 80~ MM Claims & counting
- 280~ MM Activities & counting
- Insurance Coverage: Dubai – Private and Public\*\*\*
- 1300+ Clinics
- 40+ Hospitals
- 1100+ Pharmacies
- 85+ Optical
- 20+ Laboratory

### NEW OFFERINGS

- Days on Treatment (DoT)
- Prescribed vs. Dispensed Claims
- Comorbidity
- Physicians by Specialty
- Switch Matrix
- Grouped Hospital/Pharmacy Analysis
- Patients by Diagnosis
- Health Care Resources Utilization
- Procedures/Surgeries
- Patient Demographics
- Understanding factors associated with an outcome
- HBA1C
- 'Time to event' of interest
- Claim Rejections & Reasons

**Delivering Real World Insights**

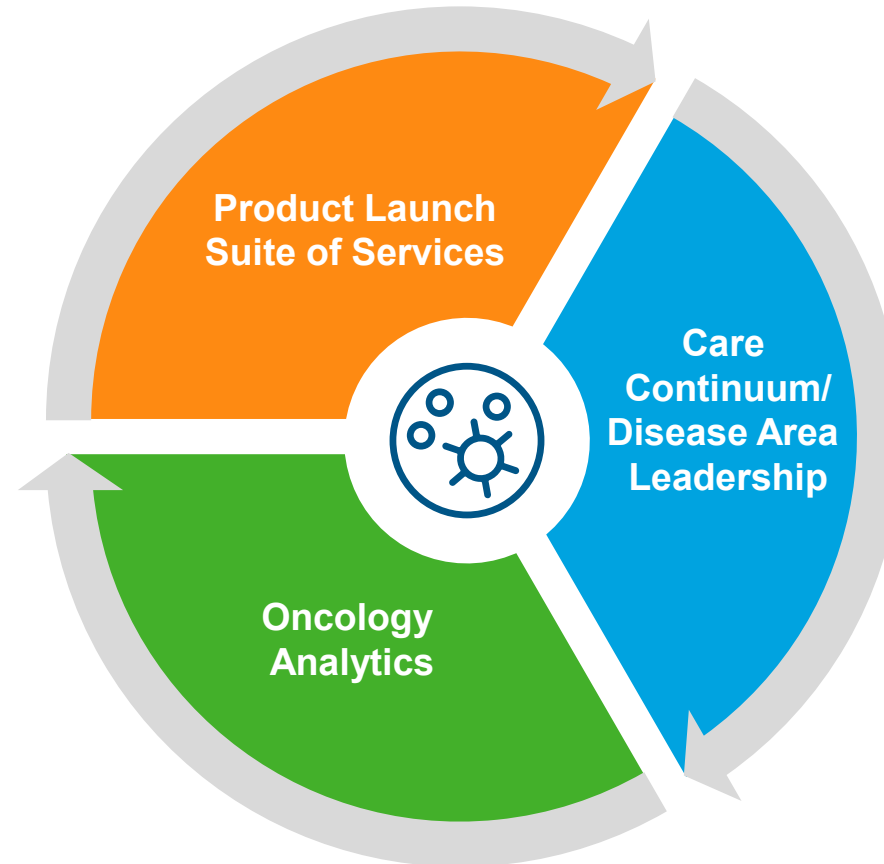
\*Entire Dubai population to be covered by 2018; \*\*Subject to Monthly Refresh – 2 months lag; \*\*\*Dubai Private Sector Providers; ~Approximate

# Our oncology solutions could be customized to meet different end goals and strategic objectives

Catering to pre and post launch needs of pharma across:

- Forecasting/Analytics
- Medico-marketing
- Marketing
- Market Access
- Sales and Commercial
- Organizational Capabilities

- Oncology Dynamics
- Split by Indication Database/Report
- Unit Sales Conversion Database/Report
- Syndicated Reports
- Posology-based Unit Sales Conversion



Solutions aimed at:

- Awareness & Prevention
- Screening & Early Detection
- Diagnosis
- Treatment
- Compliance and Palliative care

# IQVIA data coverage in rest of the markets also has been enhanced, improving the robustness of our analysis over time

## Private Market1: Data coverage and enhancements

Geography	Countries	Number of DS <sup>2</sup>	Coverage <sup>3</sup>	Enhancements in 2018/2019 Planned	Period of enhancement
Middle East	Saudi Arabia	Sell-in: 36 Sell-out: 10	98%	• Adding 3 Distributors in each Sell-in and Sell-out panel	Q2 2019
	UAE	23	97%	• Adding 4 Distributors	Q2 2019
	Kuwait	18	98%	• -	-
	Bahrain	11	88%	• Added 2 new Distributors	Across the year
	Jordan	20	62%	• -	Across the year
	Egypt	Sell-in: 48 Sell-out: 6	98% (100%) <sup>4</sup>	• Adding 7 Distributors for Sell-in	Q2 2019
	Lebanon	30	82%	• Adding 3 Distributors	Q2 2019
	Iraq	6	65%	-	-
Africa	South Africa	38	91% (100%) <sup>4</sup>	• 1 New Distributor added for Oncology market	Q2 2018, Q2 2019
	Tunisia	42	72%	• Added 5 new Wholesalers in 2018; 2 new Wholesalers planned in 2019 improving market share by 8%	Across the year
	Algeria	53	75%	• Added 7 new Wholesalers in 2018; 3 new Wholesalers planned in 2019 improving market share by 3%	Across the year
	Morocco	40	84%	• Adding 1 Wholesaler	2018
	Fr. West Africa	27	85%	• Adding 2 New Wholesalers in 2018, 6 New Wholesalers planned for 2019	Across the year
	Kenya	18	40%	• Adding 3 Distributors	-

1: Non-Exhaustive List | 2: DS – Distributors | 3: Coverage refers to National level data coverage in market value terms | Coverage projected to 100% for all ME countries

# Even in the Public channel, we are constantly improving our understanding of the market

*Public/Govt. Market<sup>1</sup>: Data coverage and enhancements*

Geography	Countries	Number of DS <sup>2</sup>	Coverage	Enhancements in 2018	Period of enhancement
<b>Middle East</b>	Saudi Arabia	27	85%	Adding 1 Distributors	Q3 2018
	UAE	20	95%	Adding 2 Distributors	Q4 2018
	Kuwait	18	90%	Adding 2 Distributors	Q2 2018
	Egypt	44	75%	Adding 8 Distributors	Across the year
<b>Africa</b>	South Africa	18	50%	-	-
	Tunisia	1	100%	-	-

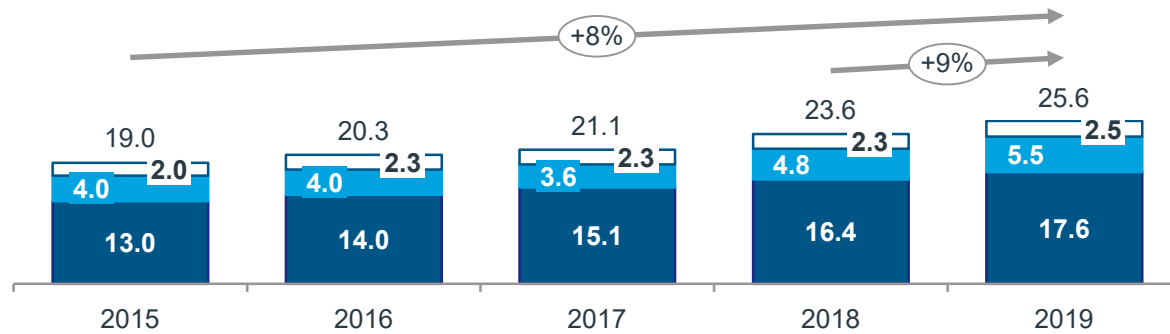
1: Non-Exhaustive List | 2: DS – Distributors

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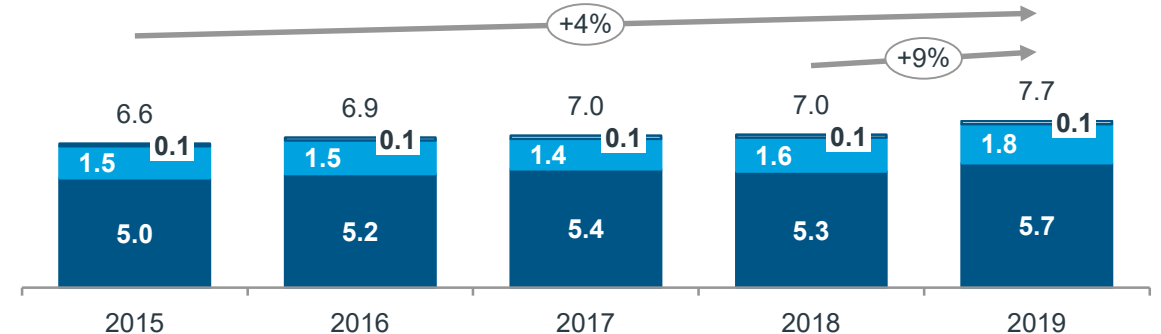
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# MEA Pharma is growing at 9% PPG in value and volume, driven by Institutional channel growth in KSA, Egypt and South Africa

Total sales (\$USD, B)



Total sales (Units, B)



	PPG % <sup>1</sup>	CAGR % <sup>1</sup>
LPO <sup>2</sup>	7%	6%
RETAIL <sup>3</sup>	7%	8%
INSTITUTIONAL <sup>4</sup>	15%	8%
<b>Total Market</b>	<b>9%</b>	<b>8%</b>

	PPG % <sup>1</sup>	CAGR % <sup>1</sup>
LPO <sup>2</sup>	3%	4%
RETAIL <sup>3</sup>	7%	3%
INSTITUTIONAL <sup>4</sup>	15%	5%
<b>Total Market</b>	<b>9%</b>	<b>4%</b>

- **Institutional channel** continues to drive growth in the region with **KSA, Egypt an RSA** growing by 13%, 18% and 24% PPG through institutional channel respectively
- **LPO channel** has shown moderate growth with **KSA and UAE** growing at 13% and 19% while Kuwait lost 9% value sales over last year through LPO
- **Egypt grew the fastest** in the region through retail channel growing at 26% PPG in value sales

1. PPG (Previous Period Growth) calculated for MAT Q1 2019 vs MAT Q1 2018 and CAGR (Compound Annual Growth Rate) is calculated for MAT Q1 2015 - 2019

2. LPO data available for UAE, Kuwait and KSA

3. Retail includes private hospitals and is available for all countries included

4. Institutional data available for KSA, Egypt, RSA, Tunisia

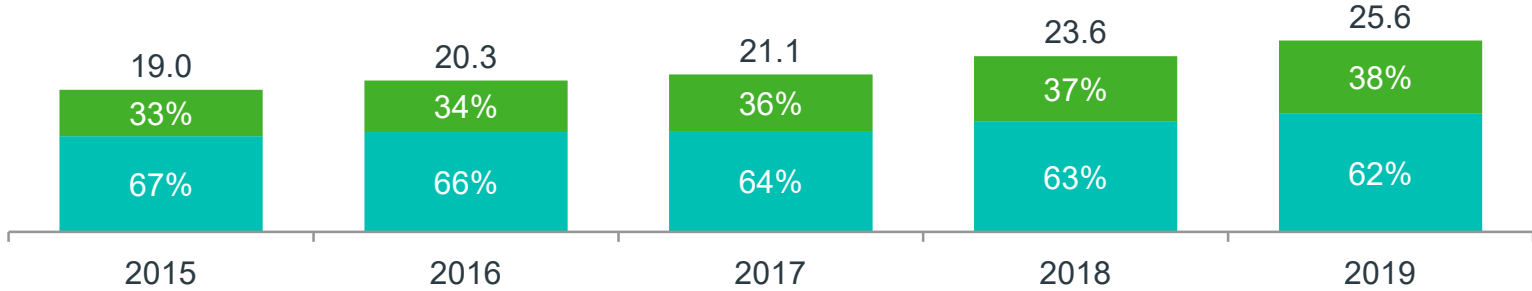
Analysis based on Algeria, Egypt, Fr. West Africa, Jordan, Kuwait, Lebanon, Morocco, Saudi Arabia, South Africa, Tunisia, UAE

Source: IQVIA Audited Data, MAT Q1 2019, includes IQVIA private, LPO, institutional data where available; Value sales at ex-factory price level without discount; Egypt sales at constant exchange rate and don't account for any currency fluctuation or devaluation

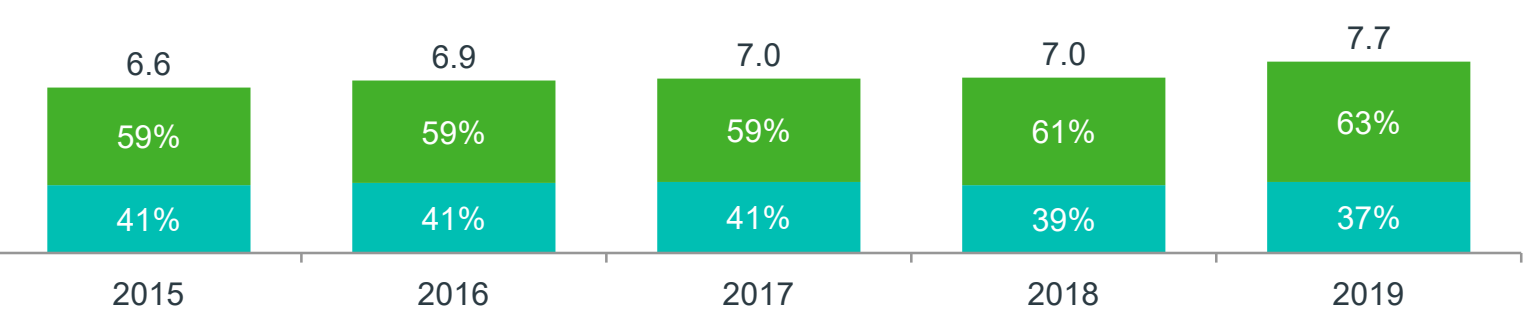


# Share of Local/Reg companies continues to increase in both value and volume terms

**Total sales (\$USD, B)**



**Total sales (Units, B)**



Hikma, Adcock Ingram, Aspen are among largest Local/Regional companies in the region growing at double digit however Julphar lost 32% sales in MEA driven by loss in KSA market (-47%)

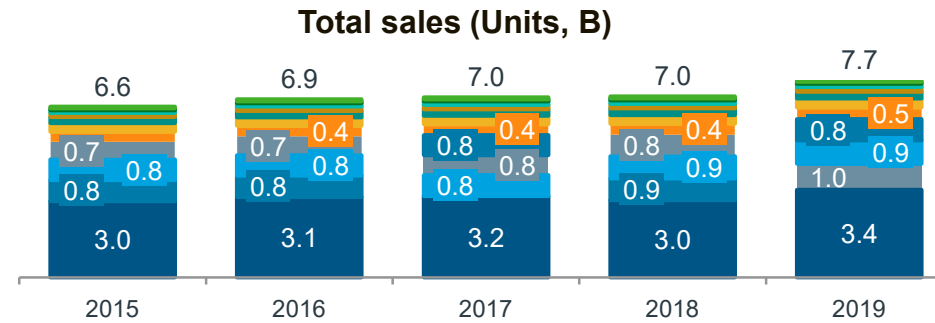
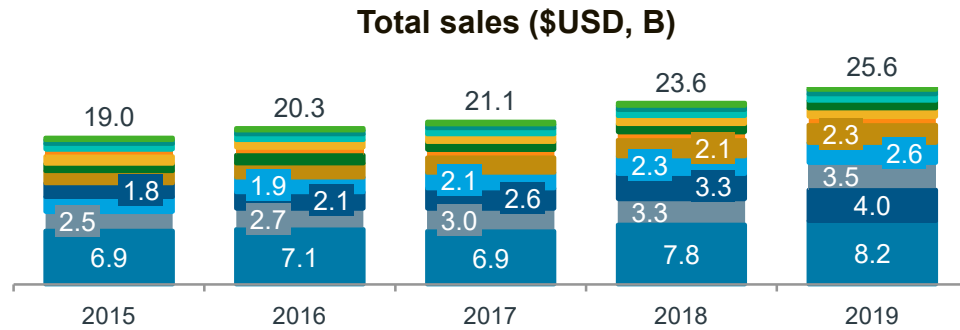
	PPG %	CAGR %
LOC/REG <sup>1</sup>	11%	12%
MNC <sup>1</sup>	7%	5%
<b>Total Market</b>	<b>9%</b>	<b>8%</b>

	PPG %	CAGR %
LOC/REG	12%	5%
MNC	4%	1%
<b>Total Market</b>	<b>9%</b>	<b>4%</b>

- Growth of **Local companies** in the region was mainly observed in Turkey, Egypt and Algeria where local companies grew by 18%, 25% and 21% PPG respectively
- S Africa, Algeria, Egypt and FWA experienced double digit volume growth for local/Reg companies

1. MNC: Multinational companies, Loc/Reg: Local and Regional companies  
 Source: IQVIA Audited Data, MAT Q1 2019, includes IQVIA private, LPO, institutional data where available; Value sales at ex-factory price level without discount; Egypt sales at constant exchange rate and don't account for any currency fluctuation or devaluation

# Most MEA countries have continued to grow in value terms, however, Kuwait and Jordan sales have dropped by 4% and 6%



	PPG%	CAGR	R:I <sup>1</sup>	L:M <sup>1</sup>
KSA	6%	4%	44:56	31:69
UAE	10%	10%	77:23	21:79
KWT	-4%	1%	27:73	11:89
EGY	24%	23%	69:31	54:46
LEB	0%	3%	100:0	31:69
JOR	-6%	5%	100:0	42:58
ALG	12%	7%	100:0	49:51
MOR	6%	4%	100:0	41:59
TUN	12%	5%	70:30	37:63
FWA	5%	4%	100:0	37:63
RSA	7%	9%	80:20	48:52
<b>Total Market</b>	<b>9%</b>	<b>8%</b>	<b>69:31</b>	<b>38:62</b>

	PPG%	CAGR	R:I <sup>1</sup>	L:M <sup>1</sup>
KSA	-3%	1%	60:40	54:46
UAE	0.6%	6%	87:13	37:63
KWT	-10%	2%	42:58	25:75
EGY	14%	3%	70:30	72:28
LEB	-2%	4%	100:0	35:65
JOR	-7%	3%	100:0	52:48
ALG	6%	3%	100:0	59:41
MOR	3%	1%	100:0	48:52
TUN	2%	1%	82:18	50:50
FWA	6%	5%	100:0	40:60
RSA	21%	10%	52:48	74:26
<b>Total Market</b>	<b>9%</b>	<b>4%</b>	<b>75:25</b>	<b>63:37</b>

- Double digit PPG in value sales was observed in **UAE, Egypt, Algeria and Tunisia** growing by 10%, 24% 12% and 12% respectively
- Kuwait & Jordan saw declining sales with PPG at -4% and -6% driven by drop in LPO and retail channels respectively
- Volume sales of **South Africa** experienced increase<sup>1</sup> of 21% last year driven by 49% growth in institutional channel
- Value growth has been higher compared to volumes as innovative products consumption increase in MEA region

1. R:I represents Retail vs. Institutional sales; L:M represents Local vs. MNC sales

Analysis based on Algeria, Egypt, Fr. West Africa, Jordan, Kuwait, Lebanon, Morocco, Saudi Arabia, South Africa, Tunisia, UAE

Source: IQVIA Audited Data, MAT Q1 2019, includes IQVIA private, LPO, institutional data where available; Value sales at ex-factory price level without discount; Egypt sales at constant exchange rate and don't account for any currency fluctuation or devaluation

Note 1: Growth in South Africa State Sector (Hospital Channel) includes direct to state deliveries, retrospective data addition and some direct buy outs from State Hospitals in 2018

# Aliment. treatment products continue to be the largest TA; all of the top TAs managed to grow retaining their respective positions

Top selling therapy areas

PPG%	CAGR%	Ranking change	Sales (\$USD, B) 2019	R:I	L:M
9%	9%	↔	1 4.7	74:26	37:63
6%	4%	↔	2 4.0	56:44	47:53
7%	8%	↔	3 2.7	70:30	44:56
6%	5%	↔	4 2.5	72:28	39:61
7%	6%	↔	5 1.9	81:19	43:57
19%	15%	↔	6 1.7	28:72	10:90
7%	7%	↔	7 1.4	83:17	49:51
10%	7%	↔	8 1.3	88:12	42:51
18%	9%	↔	9 1.2	52:48	29:71
9%	11%	↔	10 1.1	86:14	45:55

- **KSA accounts for 30%** share in total **Alimentary tract** sales in MEA while **Egypt** recorded the fastest PPG of 29% in value
- **Anti-Neoplasm TA** have grown at the fastest rate owing the exponential growth in Morocco (147%) last year
- Growth in **Blood Products** was driven by double digit growth in Egypt (30% PPG) and KSA (22% PPG)

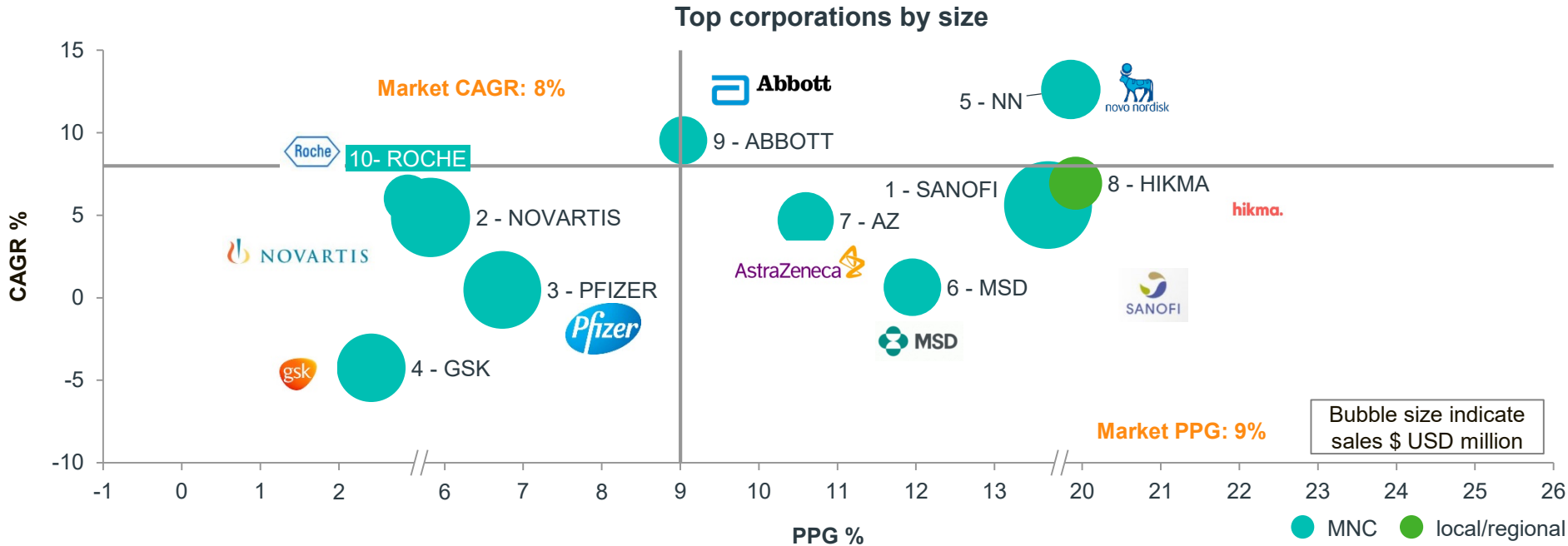
1. R:I stands for Retail:Institution and L:M stands for Local:MNC; Institution includes LPO tender data where available

2. Arrows indicate change in companies ranking in reference to its ranking in the previous MAT (MAT Q4 2018 vs MAT Q1 2019)

Analysis based on Algeria, Egypt, Fr. West Africa, Jordan, Kuwait, Lebanon, Morocco, Saudi Arabia, South Africa, Tunisia, UAE

Source: IQVIA Audited Data, MAT Q1 2019, includes IQVIA private, LPO, institutional data where available; Value sales at ex-factory price level without discount; Egypt sales at constant exchange rate and don't account for any currency fluctuation or devaluation

# Sanofi & Novartis continue to be the largest companies; Abbott featured in top 10



Rank	Corporation	Sales <sup>1</sup>	Rank	Corporation	Sales <sup>1</sup>
1	SANOFI	1,769	6	MSD	761
2	NOVARTIS	1,447	7	AZ	725
3	PFIZER	1,390	8	HIKMA	641
4	GSK	1,081	9	ABBOTT	532
5	NN	810	10	ROCHE	531

- 8 corporations have retained their positions from last quarter. **Abbott** appeared at 9<sup>th</sup> position with **Roche** slipping one rank down
- Top 10 corporations account for **38% market share** in MEA
- MNCs dominate the top 10 with **Hikma** being the only local company among them growing fast at 20% PPG
- Hikma's growth can be attributed to **Megamox (52%), Samixon (53%), Glucare (141%) and Pranza (275%)**
- Among the top MNCs, **Novo Nordisk** has grown the fastest owing to growth of brands like **Norditropin (55%) and Saxenda (130%)**

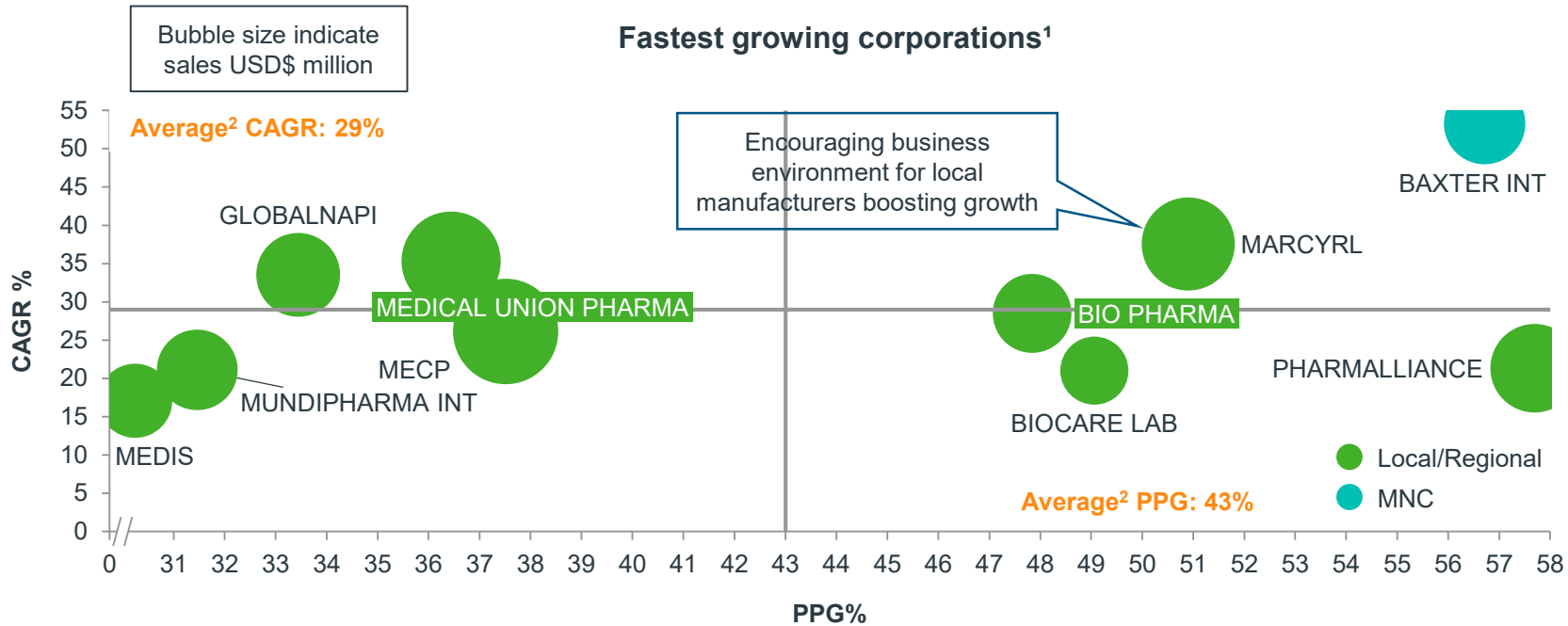
1. \$USD (M), MAT Q1 2019

Analysis based on Algeria, Egypt, Fr. West Africa, Jordan, Kuwait, Lebanon, Morocco, Saudi Arabia, South Africa, Tunisia, UAE

Source: IQVIA Audited Data, MAT Q1 2019, includes IQVIA private, LPO, institutional data where available; Value sales at ex-factory price level without discount; Egypt sales at constant exchange rate and don't account for any currency fluctuation or devaluation

b. : Base period MAT Q1 2018 Sales

# 9 out of top 10 fast growing corporations are local/regional; Baxter is the only MNC to feature in top 10 fastest growing list



Rank by PPG	Corporation*	Sales <sup>1</sup>
1	PHARMALLIANCE	89
2	BAXTER INT	75
3	MARCYRL	98
4	BIOCARE LAB	53
5	BIO PHARMA	70
6	MECP	126
7	MEDICAL UNION	111
8	GLOBALNAPI	80
9	MUNDIPHARMA INT	74
10	MEDIS	62

- **Pharmalliance** became the fastest growing corporation as a result of exponential growth of products like **Telmisarte Plus (1659% PPG)** and **Lisinox (86% PPG)**
- **Baxter** continues to be the only MNC among the fastest growing corporations with **Albumin Bioe and Human Albumin** growing at 3 digit PPG of **116% & 248%** respectively

1. Fastest growing corporations (by PPG) with value greater than \$USD 50 million

2. Average considering the sales of top 10 fastest growing companies

Analysis based on Algeria, Egypt, Fr. West Africa, Jordan, Kuwait, Lebanon, Morocco, Saudi Arabia, South Africa, Tunisia, UAE

Source: IQVIA Audited Data MAT Q1 2019, includes IQVIA private, LPO, institutional data where available; Value sales at ex-factory price level without discount; Egypt sales at constant exchange rate and don't account for any currency fluctuation or devaluation; Egypt market growth is real market growth however real growth at variable exchange rate is -4%

b. : Base period MAT Q1 2018 Sales

# Most top products have displayed positive growth over last year - except Lipitor and Novomix

Top selling products

PPG%	CAGR%	Ranking change <sup>1</sup>	Sales (\$USD, M) MAT Q1 2019	R:I <sup>2</sup>	ATC04	Presence										
						UAE	KWT	KSA	EGY	JOR	LEB	ALG	MOR	TUN	FWA	RSA
10%	10%	↔ 1	262	58:42	A10C5	🇦🇪	🇰🇼	🇸🇦	🇪🇬	🇯🇴	🇱🇧	🇦🇷	🇲🇷	🇹🇺	🇫🇼	🇿🇦
18%	15%	↔ 2	235	17:83	L4B0	🇦🇪	🇰🇼	🇸🇦	🇪🇬		🇱🇧	🇦🇷	🇲🇷	🇹🇺		🇿🇦
20%	-4%	↑ 3	215	12:88	J7D1	🇦🇪		🇸🇦	🇪🇬	🇯🇴	🇱🇧	🇦🇷	🇲🇷	🇹🇺	🇫🇼	🇿🇦
5%	-5%	↑ 4	204	92:8	J1C1	🇦🇪	🇰🇼	🇸🇦	🇪🇬	🇯🇴	🇱🇧	🇦🇷	🇲🇷	🇹🇺	🇫🇼	🇿🇦
-0.2%	-3%	↓ 5	198	41:59	C10A1	🇦🇪	🇰🇼	🇸🇦	🇪🇬	🇯🇴	🇱🇧	🇦🇷	🇲🇷	🇹🇺	🇫🇼	🇿🇦
22%	14%	↔ 6	162	54:46	B1B2	🇦🇪	🇰🇼	🇸🇦	🇪🇬	🇯🇴	🇱🇧	🇦🇷	🇲🇷	🇹🇺	🇫🇼	🇿🇦
6%	4%	↔ 7	153	59:41	A2B2	🇦🇪	🇰🇼	🇸🇦	🇪🇬	🇯🇴	🇱🇧	🇦🇷	🇲🇷	🇹🇺	🇫🇼	🇿🇦
19%	18%	↑ 8	147	65:35	A10C1	🇦🇪	🇰🇼	🇸🇦	🇪🇬	🇯🇴	🇱🇧	🇦🇷	🇲🇷	🇹🇺	🇫🇼	🇿🇦
2%	11%	↓ 9	144	66:34	A10C3	🇦🇪	🇰🇼	🇸🇦	🇪🇬	🇯🇴	🇱🇧	🇦🇷	🇲🇷	🇹🇺	🇫🇼	🇿🇦
8%	4%	↔ 10	144	97:3	M1A1	🇦🇪	🇰🇼	🇸🇦	🇪🇬	🇯🇴	🇱🇧	🇦🇷	🇲🇷	🇹🇺	🇫🇼	🇿🇦

- **Lovenox, Prevnar and Novorapid** grew the fastest among top selling brands. Prevnar's growth is mainly driven by KSA where it grew at 23% (adding \$36 Mn in 2019), Lovenox had double digit PPG in KSA, RSA, Egypt, Algeria, UAE & Jordan. Novorapid had major growth in Algeria (27%) and KSA (16%)
- **Lipitor** slipped down 2 positions owing to its loss of sales in KSA where it lost ~\$3.4 Mn over last MAT

1. Arrows indicate change in companies ranking in reference to its ranking in the previous MAT (MAT Q1 2019 vs MAT Q4 2018)

2. R:I stands for Retail:Institutional, Institutional includes LPO and tender data where available

Analysis based on Algeria, Egypt, Fr. West Africa, Jordan, Kuwait, Lebanon, Morocco, Saudi Arabia, South Africa, Tunisia, UAE

Source: IQVIA Audited Data, MAT Q1 2019, includes IQVIA private, LPO, institutional data where available; Value sales at ex-factory price level without discount; Egypt sales at constant exchange rate and don't account for any currency fluctuation or devaluation

# IQVIA believes that there are six core emerging trends that could impact the MEA market in near future



## Technology Adoption

- Rise of telemedicine and e-health adoption among countries
- Development of digital ICT<sup>1</sup> industry



## Generic and Biosimilar Adoption

- Rising share of generics and biosimilars
- Biosimilars replacing biologics in leading tender bodies



## Maturing Regulatory Environment

- Fast track processes for innovative meds
- HTA<sup>2</sup> is slowly adopted into approval process
- Clinical guidelines/local data generation importance



## Expansion of Healthcare Coverage

- Innovative healthcare funding models
- Mandatory insurance coverage on the rise / Privatization
- Expanding PPP<sup>3</sup> in HC services



## Patient Centricity

- Increasing patient centricity
- Importance of patient education and patient support programs



## Localization/Local Partnerships

- Govt. endorsements and benefits to promote local manufacturing
- Rising investment in local manufacturing
- Stringent local labor laws

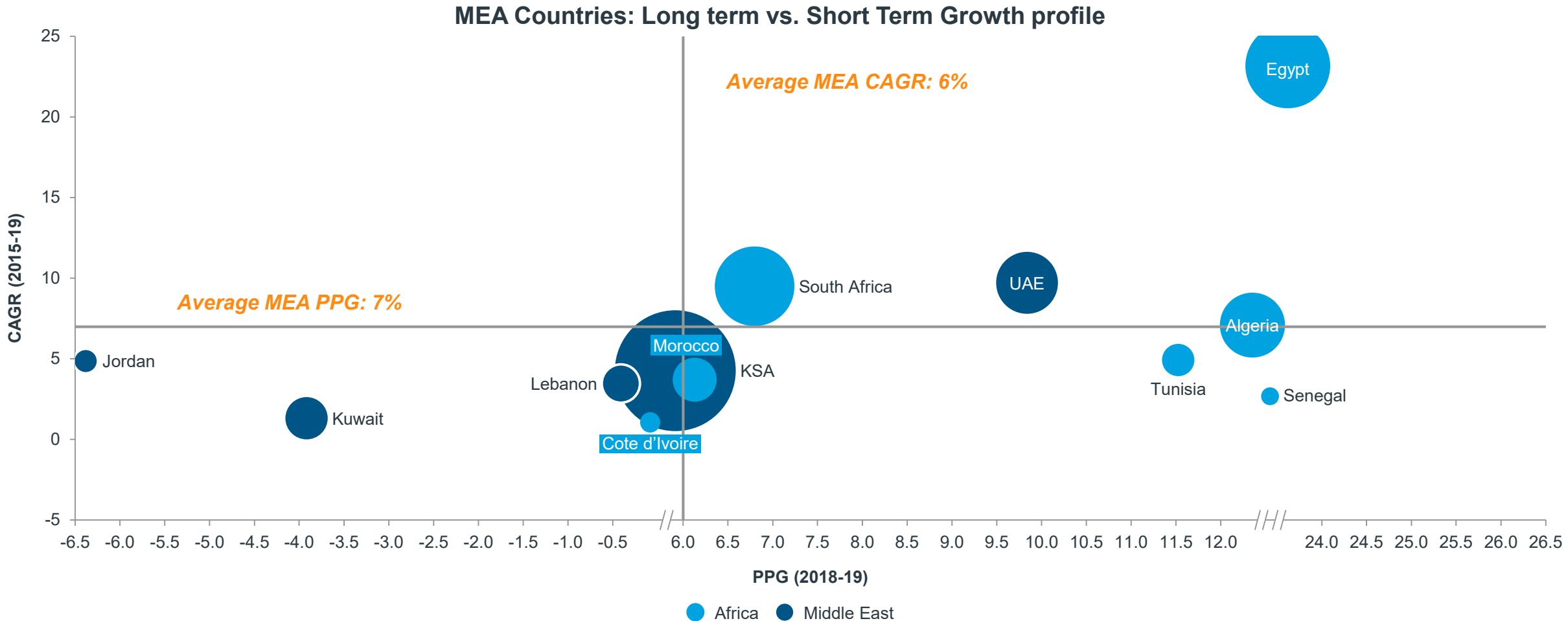
1. ICT – Information and Communications Technology 2: HTA – Health Technology Assessment | 3: PPP – Public Private Partnership

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# In MEA region, Algeria, UAE and Egypt are key countries driving the growth of the region



Source: IQVIA Audited Data MAT Q1 2019 private, LPO, institutional data where available; Value sales at ex-factory price level without discount; Egypt sales at constant exchange rate and don't account for any currency fluctuation or devaluation

# KSA market is valued at ~\$8.2 Bn growing at 5.9% PPG; Pfizer and Prevnar continue to be the leading corporation & brand

Key Statistics	Market Size (US\$,B)	PPG (US\$) (MAT Q1 2018 - 2019)	Retail vs Institutional Split (US\$)
	8.2	5.9%	44:56

	Top TA's (\$USD, M)		New launches <sup>1</sup>		Top products/selling corp (product sales M\$) <sup>2,3</sup>		Top corporations (M\$) <sup>2,3</sup>	Fastest growing corps <sup>4</sup> (M\$, PPG)
1	J (ANTI-INF) (1,539)		41	↔	PREVNAR/PFIZER (195)	↔	PFIZER (644)	MSD (294,43%)
2	A (ALIMENT) (1,398)		43	↔	HUMIRA/ABBVIE (137)	↔	SANOFI (535)	HIKMA PHARMA (338,41%)
3	N (NERVOUS) (736)		25	↑	MENACTRA/SANOFI (105)	↔	NOVARTIS (420)	MECP (125,37%)
4	L (ANTI-NEO) (731)		20	↓	LANTUS/SANOFI (90)	↑	TABUK (410)	AMGEN (110,31%)
5	C (CARDIO) (658)		32	↑	LIPITOR/PFIZER (85)	↓	SPIMACO (385)	SANOFI (535,28%)
6	V (VARIOUS) (520)		34	↑	NEXIUM/ASTRAZENECA (72)	↔	GSK (375)	LILLY (132,26%)
7	R (RESPIR) (514)		12	↑	ARANESP/AMGEN (67)	↔	HIKMA PHARMA (338)	ASTRAZENECA (240,21%)
8	B (BLOOD) (490)		10	↑	NORDITROPIN/NOVO NORDISK (66)	↔	NOVO NORDISK (312)	J&J (188,20%)
9	M (MUSCULO) (384)		11	↓	REKSON/TABUK (63)	↔	MSD (294)	ALLERGAN (93,16%)
10	D (DERMA) (351)		24	↑	LOVENOX/SANOFI (56)	↔	ASTRAZENECA (240)	SERVIER (70,13%)

- **Anti-infectives and Alimentary** TAs lead the KSA market with **19% and 17%** share in sales. Alimentary TA has the maximum number of new launches adding **\$18Mn** to sales in 2019
- **Prevnar (Pneumo. Conj Vacc)** and **Humira (adalimumab)** continue to be the top 2 brands in KSA. **Menactra (Mening. Conj. Vacc)** climbed up to 3<sup>rd</sup> from 5<sup>th</sup> position in last quarter, growing exponentially at 213% PPG. **Lipitor features among top products but it has been withdrawn in 2019, so future sales are expected to drop**
- Top 10 corporations account for 48% market share with 8 out of 10 companies retaining their positions with respect to previous quarter
- **MSD** became the fastest growing corporation owing to **Januvia's (sitagliptin)** and **Rotateq's (Rotavirus vaccine)** exponential growth in Tender market; Rotateq sales increased by \$51 Mn and Januvia sales increased by \$28 Mn in Tender channel

Source: IQVIA Audited Data, MAT Q1 2019, includes IQVIA private, LPO, institutional data where available; Value sales at ex-factory price level without discount

1. New launches are classified as products launched in MAT Q1 2019 and have sales for the first time in this reporting period
2. Arrows indicate change in ranking in reference to its ranking in the previous MAT (MAT Q1 2019 vs MAT Q4 2018)
3. Number in brackets shows MAT Q1 2019 values sales in Million USD\$
4. Fastest growing corporations among the top 30 corporations by value sales

# In South Africa, market has reached ~ \$3.5Bn growing at ~6.8% over last MAT; Aspen continues to be the top company

Key Statistics	Market Size (US\$,B)	PPG (US\$) (MAT Q1 2018 - 2019)	Retail vs Institutional Split (US\$)
	3.5	6.8%	80:20

	Top TA's (\$USD, M)		New launches <sup>1</sup>		Top products/selling corp (product sales M\$) <sup>2,3</sup>		Top corporations (M\$) <sup>2,3</sup>	Fastest growing corps <sup>4</sup> (M\$, PPG)
1	J (ANTI-INF) (673)		33	↔	ATROIZA/MYLAN (50)	↔	ASPEN (409)	NATIONAL BIOPROD (34,43%)
2	N (NERVOUS) (592)		20	↔	VIRADAY/CIPLA (50)	↔	ADCOCK INGRAM (306)	AUSTELL CORP. (46,30%)
3	A (ALIMENT) (506)		65	↑	VIROTRENZ/SUN PHARMA (27)	↔	CIPLA (258)	DR REDDYS LAB (29,26%)
4	R (RESPIR) (369)		18	↑	TRIBUSS/ASPEN (28)	↔	SANOFI (240)	ASTELLAS PHARMA (28,16%)
5	C (CARDIO) (279)		14	↓	DEPAKINE/SANOFI (33)	↑	NOVARTIS (183)	TAKEDA (32,13%)
6	G (GU SYST) (195)		17	↑	LANZOL/CIPLA (7)	↓	PFIZER (178)	NOVO NORDISK (63,13%)
7	L (ANTI-NEO) (182)		19	↓	KALETRA/ABBVIE (31)	↔	MYLAN (145)	ACINO PHARMA (59,13%)
8	M (MUSCULO) (160)		21	↑	NEXIUM/ASTRAZENECA (18)	↑	MSD (107)	NOVARTIS (183,11%)
9	B (BLOOD) (157)		14	↓	BETAPYN/ADCOCK INGRAM (22)	↓	J & J (107)	INOVA PHARMA (49,11%)
10	D (DERMA) (136)		11	↓	LOVENOX/SANOFI (29)	↓	BAYER (103)	BOEHRINGER INGEL (28,10%)

- Top 4 TAs account for 60% market share with **Anti-infectives** leading the market while **Alimentary** TA has the maximum no. of new launches in MAT Q1 2019 adding \$1.7 Mn to sales
- Top 10 corporations account for 57% share in sales with **Aspen contributing 12%** in sales growing at 10% PPG
- **Atroiza (Efavirenz+Emtricitabine+Tenofovir Disoproxil)** continues to be the top selling brand however it has lost 37% sales (~\$30 Mn) over last MAT

Source: IQVIA Audited Data, MAT Q1 2019, includes IQVIA private, LPO, institutional data where available; Value sales at ex-factory price level without discount

\*South Africa Retail includes data from Distributors, Wholesalers, Direct sales from Manufacturers, Buying groups covering nearly 86% of the market, excluding Public Hospitals

1. New launches are classified as products launched in MAT Q1 2019 and have sales for the first time in this reporting period
2. Arrows indicate change in ranking in reference to its ranking in the previous MAT (MAT Q1 2019 vs MAT Q4 2018)
3. Number in brackets shows MAT Q1 2019 values sales in Million USD\$
4. Fastest growing corporations among the top 30 corporations by value sales

# Egypt market stayed at \$4Bn with growth at 24% at constant ex- rate, (at fluctuating rate growth was 24%)

Key Statistics	Market Size (US\$,B)	PPG (US\$) (MAT Q1 2018 - 2019)	Retail vs Institutional Split (US\$)
	4	23.6% (24%)*	69:31

	Top TA's (\$USD, M)		New launches <sup>1</sup>		Top products/selling corp (product sales M\$) <sup>2,3</sup>		Top corporations (M\$) <sup>2,3</sup>	Fastest growing corps <sup>4</sup> (M\$, PPG)
1	A (ALIMENT) (822)		61	↑	VOLTAREN/NOVARTIS/GSK (63)	↔	NOVARTIS (327)	NESTLE (40,110%)
2	J (ANTI-INF) (620)		32	↓	AUGMENTIN/GSK (58)	↔	PHARCO (231)	CHEMIPHARM (37,56%)
3	C (CARDIO) (383)		25	↑	ACTRAPHANE HM/NOVO NORDISK (30)	↔	SANOFI (209)	NOVO NORDISK (54,52%)
4	N (NERVOUS) (382)		32	↓	LOVENOX/SANOFI (28)	↔	GSK (196)	MARCYRL (98,51%)
5	M (MUSCULO) (313)		13	↔	LYROLIN/HIKMA PHARMA (26)	↔	AMOUN PHARMA (158)	MASH (46,51%)
6	R (RESPIR) (270)		17	↔	CONGESCOR/MERCK KGAA (22)	↔	PFIZER (132)	BAYER (56,46%)
7	G (GU SYST) (255)		33	↔	BRUFEN/ABBOTT (20)	↔	EIPICO (123)	MEDICAL UNION (102,43%)
8	L (ANTI-NEO) (246)		8	↑	PANADOL/GSK (20)	↔	EVA PHARMA (114)	ROCHE (69,40%)
9	B (BLOOD) (198)		17	↑	PLAVIX/SANOFI (20)	↔	MEDICAL UNION (102)	ASTRAZENECA (84,36%)
10	V (VARIOUS) (180)		17	↓	RANI/PHARCO (20)	↔	HIKMA PHARMA (100)	HIKMA PHARMA (100,35%)

- Top 10 brands in Egypt together added additional ~\$64 Mn to sales in 2019 with **Voltaren (Diclofenac)** being the leading brand, **Actraphane HM (Insulin)** and **Lyrolin(pregabalin)** grew fast at 65% and 105% PPG
- Nestle's growth can be attributed to tremendous growth of Infant milk formulations **Nestogen (479%)** and **Nan (147%)** over last MAT
- 8 out of top 10 corporations have retained their positions from last quarter and have grown at >15% PPG expect **Pharco** which grew slowly at 8%

Source: IQVIA Audited Data, MAT Q1 2019, includes IQVIA private, LPO, institutional data where available; Value sales at ex-factory price level without discount. Egypt sales at constant exchange rate and don't account for any currency fluctuation or devaluation however real growth at variable exchange rate is 24%

\*Growth rate at variable exchange rate, considering currency fluctuations

1. New launches are classified as products launched in MAT Q1 2019 and have sales for the first time in this reporting period
2. Arrows indicate change in ranking in reference to its ranking in the previous MAT (MAT Q1 2019 vs MAT Q4 2018)
3. Number in brackets shows MAT Q1 2019 values sales in Million USD\$
4. Fastest growing corporations among the top 30 corporations by value sales

# In Algeria, the market has reached \$2.5Bn in size, growing fast at 12.4% over last year

Key Statistics	Market Size (US\$,B)	PPG (US\$) (MAT Q1 2018 - 2019)	Retail vs Institutional Split (US\$)
	2.5	12.4%	100:0*

	Top TA's (\$USD, M)		New launches <sup>1</sup>		Top products/selling corp (product sales M\$) <sup>2,3</sup>		Top corporations (M\$) <sup>2,3</sup>	Fastest growing corps <sup>4</sup> (M\$, PPG)
1	A (ALIMENT) (583)		106	↔	LANTUS/SANOFI (92)	↔	SANOFI (321)	SALEM DIAGNOSTIC (35,2249%)
2	C (CARDIO) (399)		25	↔	NOVORAPID/NOVO NORDISK (67)	↔	EL KENDI (192)	NEO MEDIC (32,180%)
3	N (NERVOUS) (292)		30	↔	NOVOMIX/NOVO NORDISK (57)	↔	NOVO NORDISK (182)	BIONIME (22,126%)
4	J (ANTI-INF) (287)		14	↔	AUGMENTIN/GSK (40)	↔	GSK (110)	SOPHAL (39,91%)
5	R (RESPIR) (197)		26	↑	CHECK 3/SALEM DIAGNOSTIC (35)	↔	HIKMA PHARMA (96)	PHARMALLIANCE (89,58%)
6	T (DIAGNOS) (167)		5	↔	VITAL CHECK/VITAL CARE (34)	↔	PHARMALLIANCE (89)	BIOCARE LAB (53,49%)
7	G (GU SYST) (161)		30	↓	AMOCLAN/HIKMA PHARMA (30)	↔	PFIZER (72)	BIO PHARMA (70,48%)
8	M (MUSCULO) (108)		17	↔	LOVENOX/SANOFI (27)	↑	BIO PHARMA (70)	BIOGALENIC (43,36%)
9	B (BLOOD) (87)		7	↑	DIAGNOCHECK/NEO MEDIC (25)	↓	MERINAL (70)	RECORDATI (21,34%)
10	H (SYST HORMONES) (77)		5	↔	COAPROVEL/SANOFI (25)	↓	BEKER (67)	LEO PHARMA (26,34%)

- **Alimentary TA** leads the Algeria market with 23% share in sales and 106 new launches generating \$3.6 Mn sales in MAT Q1 2019
- Top 10 corporations account for 50% of total sales which is a mix of local companies and MNCs. Local companies like **Pharmalliance and Bio Pharma** grew at 58% and 48% PPG while **Hikma Pharma lost ~\$10 Mn** over last year

\* Institutional sales are not covered

Source: IQVIA Audited Data, MAT Q1 2019, includes IQVIA private, LPO, institutional data where available; Value sales at ex-factory price level without discount

1. New launches are classified as products launched in MAT Q1 2019 and have sales for the first time in this reporting period
2. Arrows indicate change in ranking in reference to its ranking in the previous MAT (MAT Q1 2019 vs MAT Q4 2018)
3. Number in brackets shows MAT Q1 2019 values sales in Million USD\$
4. Fastest growing corporations among the top 30 corporations by value sales

# UAE has reached ~\$2.3Bn growing at 9.8%; MNCs dominate in sales; Nestle has grown at the fastest rate

Key Statistics	Market Size (US\$,B)	PPG (US\$) (MAT Q1 2018 - 2019)	Retail vs Institutional Split (US\$)
	2.3	9.8%	77:23

	Top TA's (\$USD, M)		New launches <sup>1</sup>		Top products/selling corp (product sales M\$) <sup>2,3</sup>		Top corporations (M\$) <sup>2,3</sup>	Fastest growing corps <sup>4</sup> (M\$, PPG)
1	A (ALIMENT) (502)		72	↔	LIPITOR/PFIZER (46)	↔	NOVARTIS (204)	NESTLE (44,48%)
2	J (ANTI-INF) (295)		30	↔	JANUMET/MSD (30)	↔	GSK (142)	ROCHE (65,31%)
3	C (CARDIO) (266)		18	↔	CETAPHIL/NESTLE (28)	↔	ASTRAZENECA (130)	TABUK (32,28%)
4	R (RESPIR) (204)		21	↔	CRESTOR/ASTRAZENECA (27)	↔	PFIZER (128)	ALLERGAN (36,25%)
5	D (DERMA) (173)		40	↔	NEXIUM/ASTRAZENECA (24)	↔	MSD (121)	BOEHRINGER INGEL (46,24%)
6	L (ANTI-NEO) (165)		15	↔	SAXENDA/NOVO NORDISK (22)	↑	SANOFI (87)	ABBVIE (28,21%)
7	N (NERVOUS) (157)		24	↑	HUMIRA/ABBVIE (21)	↓	JULPHAR (85)	NEXGEN PHARMA (19,20%)
8	M (MUSCULO) (135)		16	↓	VOLTAREN/GSK (21)	↔	NOVO NORDISK (84)	NEOPHARMA (60,20%)
9	G (GU SYST) (122)		28	↓	CIALIS/LILLY (20)	↑	ABBOTT (74)	NOVO NORDISK (84,18%)
10	B (BLOOD) (93)		12	↓	AUGMENTIN/GSK (19)	↓	BAYER (73)	ABBOTT (74,18%)

- **Alimentary TA** dominates the UAE market with 22% share in sales and 72 new launches generating ~\$2 Mn in 2019
- 6 out of top 10 products have retained their positions with respect to previous quarter, **Nestle's Cetaphil (Derma combination)** grew the fastest among them at 58% PPG adding `10 Mn to the sales in 2019
- Top 10 corporations are dominated by MNCs with **Julphar** being the only local company on the list however it has lost 18% (\$18 Mn) sales last year

Source: IQVIA Audited Data, MAT Q1 2019, includes IQVIA private, LPO, institutional data where available; Value sales at ex-factory price level without discount

1. New launches are classified as products launched in MAT Q1 2019 and have sales for the first time in this reporting period
2. Arrows indicate change in ranking in reference to its ranking in the previous MAT (MAT Q1 2019 vs MAT Q4 2018)
3. Number in brackets shows MAT Q1 2019 values sales in Million USD\$
4. Fastest growing corporations among the top 30 corporations by value sales

# FWA market grew at 5.4% PPG reaching ~\$1.1Bn; Sanofi leading in sales and Generic HC being the fastest growing corporation

Key Statistics	Market Size (US\$,B)	PPG (US\$) (MAT Q1 2018 - 2019)	Retail vs Institutional Split (US\$)
	1.1	5.4%	100:0*

	Top TA's (\$USD, M)		New launches <sup>1</sup>		Top products/selling corp (product sales M\$) <sup>2,3</sup>		Top corporations (M\$) <sup>2,3</sup>	Fastest growing corps <sup>4</sup> (M\$, PPG)
1	J (ANTI-INF) (186)		55	↔	EFFERALGAN/BMS (31)	↔	SANOFI (103)	GENERIC HEALTHCARE (11,45%)
2	A (ALIMENT) (183)		97	↔	DOLIPRANE/SANOFI (17)	↔	NOVARTIS (62)	LITAKA PHARMA (14,27%)
3	N (NERVOUS) (131)		48	↔	CALCIUM/VIT C NOVARTIS (10)	↔	BMS (46)	UNIPHARM (9,26%)
4	P (PARASITO) (108)		16	↔	ARTEFAN/AJANTA (10)	↔	GSK (41)	DANONE GROUPE (12,19%)
5	R (RESPIR) (90)		29	↑	AUGMENTIN/GSK (8)	↔	AJANTA (39)	UBI (14,18%)
6	C (CARDIO) (87)		50	↑	LITACOLD/LI TAKA PHARMA (8)	↔	DENK (30)	PHARMA 5 (17,15%)
7	M (MUSCULO) (57)		22	↔	SPASFON/TEVA (7)	↔	PIERRE FABRE (29)	MEDICAL PHARMACEUT (12,13%)
8	B (BLOOD) (54)		8	↑	BIMALARIL/MEDICAL PHARMACEUT (7)	↑	SERVIER (21)	EXPHAR S.A. (19,10%)
9	G (GU SYST) (51)		41	↑	NURSIE/DANONE GROUPE (7)	↔	COOPER (21)	DAFRA PHARMA (16,9%)
10	D (DERMA) (44)		35	↑	CURAM/NOVARTIS (7)	↑	IMEX PHARMA (20)	COOPER (21,8%)

- **Sanofi** continues to be the top selling corporation in FWA with 4% share growing at 4% PPG while **local company Ajanta** lost 8% (~\$3.5 Mn) sales last year
- 6 out of top 10 brands including **Doliprane(paracetamol)**, **Artefan (artemether+lumefrantin)**, **Litacold (Paracetamol Comb)** and others grew at >10% PPG while **GSK's Augmentin(Amoxi+Clavul)** lost 13% (~\$1.2 Mn) sales in 2019

\* Institutional sales are not covered

Source: IQVIA Audited Data, MAT Q1 2019, includes IQVIA private, LPO, institutional data where available; Value sales at ex-factory price level without discount

1. New launches are classified as products launched in MAT Q1 2019 and have sales for the first time in this reporting period
2. Arrows indicate change in ranking in reference to its ranking in the previous MAT (MAT Q1 2019 vs MAT Q4 2018)
3. Number in brackets shows MAT Q1 2019 values sales in Million USD\$
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# Morocco grew at 6.1% PPG reaching \$1.1Bn sales; Sanofi continues to lead while J&J grew at the fastest rate

Key Statistics	Market Size (US\$,B)	PPG (US\$) (MAT Q1 2018 - 2019)	Retail vs Institutional Split (US\$)
	1.1	6.1%	100:0*

	Top TA's (\$USD, M)		New launches <sup>1</sup>		Top products/selling corp (product sales M\$) <sup>2,3</sup>		Top corporations (M\$) <sup>2,3</sup>	Fastest growing corps <sup>4</sup> (M\$, PPG)
1	A (ALIMENT) (201)		26	↔	AUGMENTIN/GSK (22)	↔	SANOFI (92)	J & J (11,47%)
2	J (ANTI-INF) (155)		4	↔	DOLIPRANE/BOTTU S.A (17)	↔	COOPER (58)	POLYMEDIC (20,15%)
3	N (NERVOUS) (132)		17	↔	NAN/NESTLE (16)	↔	BOTTU S.A (57)	AFRIC PHAR (11,12%)
4	C (CARDIO) (103)		12	↔	NURSIE/DANONE GROUPE (13)	↔	GSK (54)	NOVO NORDISK (12,12%)
5	R (RESPIR) (84)		7	↔	OEDES/COOPER (13)	↔	NOVARTIS (44)	PROMOPHARM (29,11%)
6	M (MUSCULO) (80)		11	↔	VOLTAREN/NOVARTIS (11)	↔	PFIZER (41)	ASAC (11,9%)
7	G (GU SYST) (74)		9	↔	NOVALAC/UNITED PHARM.MAN. (10)	↑	PHARMA 5 (34)	GSK (54,9%)
8	V (VARIOUS) (62)		2	↔	AMOXIL/GLAXOSMITHKLINE (9)	↓	GALENICA (33)	SYNTHEMEDIC (16,8%)
9	S (SEN ORG) (48)		12	↑	VENTOLIN/GSK (7)	↔	SOTHEMA (32)	PHARMA 5 (34,8%)
10	D (DERMA) (47)		12	↑	SURGAM/SANOFI (6)	↔	BAYER (30)	BAYER (30,7%)

- **GSK's Augmentin (Amox+clavul)** continues to lead Moroccan market with ~\$22 Mn sales in 2019 growing at 11% PPG. Novartis' Vento line however grew the fastest among top 10 at 28% PPG adding \$1.5 Mn to sales last year
- 8 corporations have retained their positions from last quarter and have shown positive growth over last year except **Galenica** which experienced slight slowdown of 1% in this periodos

\* Institutional sales are not covered

Source: IQVIA Audited Data, MAT Q1 2019, includes IQVIA private, LPO, institutional data where available; Value sales at ex-factory price level without discount

1. New launches are classified as products launched in MAT Q1 2019 and have sales for the first time in this reporting period
2. Arrows indicate change in ranking in reference to its ranking in the previous MAT (MAT Q1 2019 vs MAT Q4 2018)
3. Number in brackets shows MAT Q1 2019 values sales in Million USD\$
4. Fastest growing corporations among the top 30 corporations by value sales



# Kuwait sales reached \$1Bn but dropped by 3.9% over last MAT, Pfizer is the leading corporation, Gruenenthal grew the fastest

	Market Size (US\$,B)	PPG (US\$) (MAT Q1 2018 - 2019)	Retail vs Institutional Split (US\$)
Key Statistics	1.0	-3.9%	27:73

	Top TA's (\$USD, M)		New launches <sup>1</sup>		Top products/selling corp (product sales M\$) <sup>2,3</sup>		Top corporations (M\$) <sup>2,3</sup>	Fastest growing corps <sup>4</sup> (M\$, PPG)
1	A (ALIMENT) (191)		29	↔	HUMIRA/ABBVIE (49)	↔	PFIZER (97)	GRUENENTHAL (11,1003%)
2	L (ANTI-NEO) (141)		13	↔	LIPITOR/PFIZER (30)	↔	SANOFI (70)	BAXTER INT (10,270%)
3	C (CARDIO) (127)		14	↑	NORDITROPIN/NOVO NORDISK (28)	↑	GSK (69)	NOVO NORDISK (68,62%)
4	N (NERVOUS) (99)		14	↓	LANTUS/SANOFI (26)	↔	NOVO NORDISK (68)	JULPHAR (30,55%)
5	J (ANTI-INF) (93)		17	↑	ZOCOR/MSD (18)	↔	ASTRAZENECA (67)	ROCHE (42,49%)
6	R (RESPIR) (83)		14	↑	CRESTOR/ASTRAZENECA (17)	↑	MSD (59)	ABBOTT (56,30%)
7	D (DERMA) (56)		35	↑	KLACID/ABBOTT (16)	↑	ABBOTT (56)	LUNDBECK (5,26%)
8	H (SYST HORMONES) (41)		1	↓	KEPPRA/GSK (13)	↑	ABBVIE (55)	SAJA PHARM (8,20%)
9	B (BLOOD) (40)		2	↑	GLUCOPHAGE/MERCK KGAA (13)	↓	NOVARTIS (53)	PFIZER (97,15%)
10	M (MUSCULO) (39)		9	↑	VICTOZA/NOVO NORDISK (13)	↓	ROCHE (42)	BOEHRINGER INGEL (22,10%)

- **Alimentary TA** leads Kuwait market with 19% share in sales in 2019 however it has lost ~\$5.6 Mn in sales last year. **Cardiovascular and Anti-infectives** have also experienced declining sales during this period, losing \$31 Mn (19% sales) and \$57 Mn (38% sales) respectively
- **GSK, MSD & Novartis** together lost ~\$61 Mn in sales last year while **Pfizer** continues to lead the market with 10% share growing at 15% PPG
- **Gruenenthal** became the fastest growing company owing to **Versatis' (lidocaine)** exponential growth adding ` \$9.6 Mn to sales

\* Source: IQVIA Audited Data, MAT Q1 2019, includes IQVIA private, LPO, institutional data where available; Value sales at ex-factory price level without discount

1. New launches are classified as products launched in MAT Q1 2019 and have sales for the first time in this reporting period  
 2. Arrows indicate change in ranking in reference to its ranking in the previous MAT (MAT Q1 2019 vs MAT Q4 2018)  
 3. Number in brackets shows MAT Q1 2019 values sales in Million USD\$  
 4. Fastest growing corporations among the top 30 corporations by value sales

# Lebanon market is valued at \$0.8Bn in value and has declined by 0.4% over last MAT

Key Statistics	Market Size (US\$,B)	PPG (US\$) (MAT Q1 2018 - 2019)	Retail vs Institutional Split (US\$)
	0.8	-0.4%	100:0*

	Top TA's (\$USD, M)		New launches <sup>1</sup>		Top products/selling corp (product sales M\$) <sup>2,3</sup>
1	A (ALIMENT) (164)		80	↔	PANADOL/GSK (12)
2	C (CARDIO) (135)		30	↑	NEXIUM/ASTRAZENECA (8)
3	N (NERVOUS) (94)		30	↔	NOVALAC/NOVALAC (8)
4	J (ANTI-INF) (63)		30	↔	NURSIE/DANONE GROUPE (8)
5	V (VARIOUS) (55)		22	↓	CRESTOR/ASTRAZENECA (7)
6	R (RESPIR) (54)		15	↑	IBRANCE/PFIZER (7)
7	L (ANTI-NEO) (52)		14	↔	CONCOR/PHARMALINE IND (6)
8	B (BLOOD) (44)		11	↓	EURO D/EUROPHARM (6)
9	M (MUSCULO) (44)		24	↓	JANUMET/MSD (6)
10	G (GU SYST) (42)		18	↑	AUGMENTIN/GSK (6)

- Price cuts announced in early 2019 have affected the value growth of Lebanon to some extent
- **Alimentary TA** leads the market with 20% share and 80 new launches contributing \$2 Mn to sales in 2019
- **AZ's Nexium (esomeprazole) and Crestor (rosuvastatin)** lost 14% and 19% sales last year while **Pfizer's Ibrance (palbociclib)** grew at 31% PPG adding ~\$1.6 Mn to sales during this period

\* Institutional sales are not covered

Source: IQVIA Audited Data, MAT Q1 2019, includes IQVIA private, LPO, institutional data where available; Value sales at ex-factory price level without discount

Top corporations in Lebanon not shown for Lebanon owing to IQVIA internal differences in data

1. New launches are classified as products launched in MAT Q1 2019 and have sales for the first time in this reporting period

2. Arrows indicate change in ranking in reference to its ranking in the previous MAT (MAT Q1 2019 vs MAT Q4 2018)

3. Number in brackets shows MAT Q1 2019 values sales in Million USD\$

4. Fastest growing corporations among the top 30 corporations by value sales

# Tunisia market is valued at \$0.6Bn growing by 11.5% over last MAT; Sanofi continues to lead while Mylan grew the fastest

Key Statistics	Market Size (US\$,B)	PPG (US\$) (MAT Q1 2018 - 2019)	Retail vs Institutional Split (US\$)
	0.6	11.5%	70:30

	Top TA's (\$USD, M)		New launches <sup>1</sup>		Top products/selling corp (product sales M\$) <sup>2,3</sup>		Top corporations (M\$) <sup>2,3</sup>	Fastest growing corps <sup>4</sup> (M\$, PPG)
1	A (ALIMENT) (83)		18	↔	AUGMENTIN/GSK (9)	↔	SANOFI (51)	MYLAN (8,290%)
2	N (NERVOUS) (81)		26	↑	TASIGNA/NOVARTIS (9)	↔	MEDIS (31)	NOVO NORDISK (10,53%)
3	J (ANTI-INF) (79)		19	↓	PRIMALAC/PHARMALYS (9)	↔	NOVARTIS (29)	TERIAK (13,39%)
4	L (ANTI-NEO) (72)		16	↔	HUMIRA/ABBVIE (8)	↔	PFIZER (28)	ABBVIE (10,37%)
5	C (CARDIO) (72)		18	↔	MABTHERA/ROCHE (7)	↔	GSK (27)	UNIMED TUNIS (18,29%)
6	R (RESPIR) (45)		13	↑	ENBREL/PFIZER (6)	↔	RECORDATI (21)	BIOLOGIX (7,26%)
7	M (MUSCULO) (26)		8	↔	LANTUS/SANOFI (6)	↔	SAIPH (20)	SAIPH (20,25%)
8	V (VARIOUS) (25)		5	↑	AMOXIL/GSK (5)	↑	HIKMA PHARMA (18)	GALPHARMA (15,25%)
9	B (BLOOD) (22)		3	↑	TRASTUMAB/MYLAN (5)	↑	UNIMED TUNIS (18)	NOVARTIS (29,22%)
10	G (GU SYST) (20)		9	↔	ENOXA/MEDIS (5)	↓	ROCHE (18)	RECORDATI (21,22%)

- **Alimentary and Nervous system** TAs lead the market accounting for 14% share in sales each. Nervous System had the maximum no. of new launches generating additional ~\$1.7 Mn in 2019
- **Mylan's** exponential growth can be attributed to its new product **Trastumab** generating ~\$5 Mn in 2019

\* Source: IQVIA Audited Data, MAT Q1 2019, includes IQVIA private, LPO, institutional data where available; Value sales at ex-factory price level without discount

1. New launches are classified as products launched in MAT Q1 2019 and have sales for the first time in this reporting period
2. Arrows indicate change in ranking in reference to its ranking in the previous MAT (MAT Q1 2019 vs MAT Q4 2018)
3. Number in brackets shows MAT Q1 2019 values sales in Million USD\$
4. Fastest growing corporations among the top 30 corporations by value sales

# Jordan's pharma market has dropped by 6.4% to reach \$0.3Bn in size; Menarini is the fastest growing corporation

Key Statistics	Market Size (US\$,B)	PPG (US\$) (MAT Q1 2018 - 2019)	Retail vs Institutional Split (US\$)
	0.3	-6.4%	100:0*

	Top TA's (\$USD, M)		New launches <sup>1</sup>		Top products/selling corp (product sales M\$) <sup>2,3</sup>		Top corporations (M\$) <sup>2,3</sup>	Fastest growing corps <sup>4</sup> (M\$, PPG)
1	A (ALIMENT) (64)		85	↔	BEBELAC/DANONE GROUPE (6)	↔	HIKMA PHARMA (30)	MENARINI (3,28%)
2	J (ANTI-INF) (46)		11	↔	AMOCLAN/HIKMA PHARMA (5)	↔	NOVARTIS (19)	NOVO NORDISK (5,22%)
3	C (CARDIO) (40)		16	↔	NEXIUM/ASTRAZENECA (4)	↔	SANOFI (19)	SERVIER (2,19%)
4	N (NERVOUS) (33)		27	↔	CRESTOR/ASTRAZENECA (3)	↔	ASTRAZENECA (17)	BOEHRINGER INGEL (8,16%)
5	V (VARIOUS) (31)		34	↔	SAHHA/NUTRIDAR (3)	↔	UNITED PHARM.MAN. (14)	SANOFI (19,12%)
6	R (RESPIR) (28)		20	↔	VOLTAREN/NOVARTIS (3)	↑	DAR AL DAWA (12)	AMMAN PHARMA (2,11%)
7	G (GU SYST) (24)		38	↔	AMARYL/SANOFI (3)	↓	PFIZER (12)	JOSWE (9,7%)
8	M (MUSCULO) (22)		23	↑	EUCREAS/NOVARTIS (2)	↔	MSD (11)	TQ PHARMA (3,6%)
9	D (DERMA) (17)		27	↓	MEGACEF MECE/HIKMA PHARMA (2)	↔	PHARMA INTERNATIONAL (11)	UNITED PHARM.MAN. (14,6%)
10	B (BLOOD) (14)		17	↔	LIPITOR/PFIZER (2)	↔	GSK (11)	DANONE GROUPE (8,3%)

- Top 5 TAs account for 61% share in total sales however they together lost ~\$20 Mn over last year
- Local company **Hikma** is the top selling corporation with 9% market share however it lost ~13% sales (\$4.5 Mn) last year. **Sanofi and United Pharma** are the only top companies experiencing positive growth

\* Institutional sales are not covered

Source: IQVIA Audited Data, MAT Q1 2019, includes IQVIA private, LPO, institutional data where available; Value sales at ex-factory price level without discount

1. New launches are classified as products launched in MAT Q1 2019 and have sales for the first time in this reporting period
2. Arrows indicate change in ranking in reference to its ranking in the previous MAT (MAT Q1 2019 vs MAT Q4 2018)
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# Bahrain market has reached \$284Mn in size, growing at 15% PPG. Top product and corporation have retained their positions

Key Statistics	Market Size (US\$,M)	PPG (US\$) (MAT Q1 2018 - 2019)	Retail vs Institutional Split (US\$)
	284	15%	28:72

	Top TA's (\$USD, M)		Top products/selling corp (product sales M\$) <sup>1,2</sup>		Top corporations (M\$) <sup>1,2</sup>	Fastest growing corps <sup>3</sup> (M\$, PPG)
1	A (ALIMENT) (63)	↔	PROGRAF/HIKMA PLC (24)	↔	PFIZER (38)	ASTRAZENECA (8,2165%)
2	L (ANTI-NEO) (54)	↑	LANTUS/SANOFI (17)	↔	HIKMA PLC (33)	RAM PHARMACEUTICAL (2,297%)
3	J (ANTI-INF SY) (39)	↓	LIPITOR/PFIZER (14)	↔	NOVARTIS (29)	NEOPHARMA (2,243%)
4	C (CARDIO) (37)	↔	HUMIRA/ABBVIE (12)	↔	SANOFI (24)	APOTEX (1,153%)
5	N (NERVOUS) (23)	↔	ENBREL/PFIZER (6)	↔	GSK (22)	UNITED PHARMA MAN (4,111%)
6	R (RESPIR) (18)	↑	NOVORAPID/NOVO NORDISK (5)	↔	NOVO NORDISK (16)	ARABIO (3,82%)
7	B (BLOOD) (12)	↓	CO-DIOVAN/NOVARTIS (5)	↔	ABBVIE (14)	TORRENT (2,75%)
8	G (GU SYST) (9)	↑	CRESTOR/ASTRAZENECA (5)	↔	BAYER HEALTHCARE (9)	GSK (22,67%)
9	M (MUSCULO) (9)	↑	ARANESP/AMGEN (4)	↑	AMGEN (9)	AMGEN (9,65%)
10	D (DERMA) (8)	↑	GALVUS MET/NOVARTIS (3)	↑	ASTRAZENECA (8)	SAJA PHARM (2,60%)

- Top 4 TAs account for 68% share in sales generating additional \$28 Mn in 2019. **Nervous system** TA sales declined by 15% over last MAT
- **Hikma's Prograf (tacrolimus)** continues to lead the market however rest of the 9 products are from MNCs. While **Lantus (insulin glargine)** and **Lipitor(atorvastatin)** have lost 11% and 16% sales respectively, sales for **Enbrel(etanercept)** grew exponentially at 226% PPG
- 8 out of top 10 corporations have retained their positions from previous quarter however **Sanofi and Bayer** experienced slowdown over last MAT; with sales declining by 8% (\$2.2 Mn) and 54% (\$11 Mn) respectively

Source: IQVIA Audited, MAT Q1 2019, includes Private and Non Private market data; Value sales at ex-factory price level without discount

1. Arrows indicate change in ranking in reference to its ranking in the previous MAT (MAT Q1 2019 vs MAT Q4 2018)
2. Number in brackets shows MAT Q1 2019 values sales in Million USD\$
3. Fastest growing corporations among the top 30 corporations by value sales

# In Senegal, the market has grown by 20% PPG to reach ~200 Mn US\$ sales in 2019

Key Statistics	Market Size (US\$,M)	PPG (US\$) (MAT Q1 2018 - 2019)	Retail vs Institutional Split (US\$)
	200	20%	100%*

	Top TA's (\$USD, M)		New launches <sup>1</sup>		Top products/selling corp (product sales M\$) <sup>2,3</sup>		Top corporations (M\$) <sup>2,3</sup>	Fastest growing corps <sup>4</sup> (M\$, PPG)
1	A (ALIMENT) (41)		54	↔	EFFERALGAN/BMS (4)	↔	SANOFI AVENTIS (16)	TROIKAA (2,52%)
2	J (ANTI-INF SY) (29)		18	↔	CA C 1000/NOVARTIS SANTE FAM (3)	↔	GSK (8)	GENERIC HEALTHCARE (7,45%)
3	N (NERVOUS) (26)		15	↔	DOLIPRANE/SANOFI AVENTIS (3)	↔	PIERRE FABRE MEDIC (8)	SOTHEMA (3,33%)
4	R (RESPIR) (20)		13	↔	LITACOLD/LITAKA PHARMACEUT (2)	↔	BMS (7)	LITAKA PHARMACEUT (6,32%)
5	C (CARDIO) (17)		19	↔	AMOXICILLINE UBI/UBI (2)	↔	GENERIC HEALTHCARE (7)	UBI (4,26%)
6	M (MUSCULO) (11)		9	↔	ASPEGIC/SANOFI AVENTIS (2)	↔	LITAKA PHARMACEUT (6)	SANDOZ (4,25%)
7	B (BLOOD) (10)		8	↔	AUGMENTIN/GSK (1)	↔	AJANTA (5)	FAES (3,24%)
8	G (GU SYST) (9)		28	↔	NURSIE LAIT/DANONE (1)	↔	UBI (4)	JANSSEN CILAG (2,24%)
9	D (DERMA) (9)		37	↑	CLAMOXYL/GSK (1)	↑	SANDOZ (4)	EXPHAR S.A. (4,22%)
10	S (SEN ORG) (8)		6	↓	ZENTEL/GSK (1)	↔	NOVARTIS PHARMA (4)	BMS (7,21%)

- **Alimentary TA** leads the market with 20% share in total sales and maximum new launches (54) **generating \$0.3 Mn in 2019**
- 8 out of top 10 products have retained their positions from previous quarters with **Efferalgan** being the top selling brand growing at 32% PPG
- GSK has 3 products among top 10, **Augmentin(amoxicillin+clavulanic acid)** lost 4% sales while **Clamoxyl (amoxicillin)** and **Zentel(albendazole)** both grew at 15% over last year

\* Institutional sales are not covered

Source: IQVIA Audited Data, MAT Q1 2019, includes IQVIA private, LPO, institutional data where available; Value sales at ex-factory price level without discount

1. New launches are classified as products launched in MAT Q1 2019 and have sales for the first time in this reporting period
2. Arrows indicate change in ranking in reference to its ranking in the previous MAT (MAT Q1 2019 vs MAT Q4 2018)
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# In Cote d'Ivoire, the market has reached ~\$231 Mn declining slowly at -0.1% PPG; Sanofi continues to be the largest player

Key Statistics	Market Size (US\$,M)	PPG (US\$) (MAT Q1 2018 - 2019)	Retail vs Institutional Split (US\$)
	231	-0.1%	100%*

	Top TA's (\$USD, M)		New launches <sup>1</sup>		Top products/selling corp (product sales M\$) <sup>2,3</sup>		Top corporations (M\$) <sup>2,3</sup>	Fastest growing corps <sup>4</sup> (M\$, PPG)
1	J (ANTI-INF SY) (37)		34	↔	EFFERALGAN/BMS (4)	↔	SANOFI AVENTIS (18)	DANONE (6,25%)
2	A (ALIMENT) (36)		77	↑	DOLIPRANE/SANOFI AVENTIS (3)	↔	GSK (9)	GENERIC HEALTHCARE (2,23%)
3	N (NERVOUS) (27)		35	↓	FERAMALT/OLEA (3)	↑	OLEA (7)	DAFRA PHARMA (2,20%)
4	P (PARASITOLOGY) (21)		8	↑	CLAMOXYL/GSK (3)	↓	BMS (7)	UNI PHARMA (2,17%)
5	R (RESPIR) (19)		29	↓	CA C 1000/NOVARTIS SANTE FAM (3)	↑	DANONE (6)	NESTLE (3,17%)
6	C (CARDIO) (18)		25	↔	NURSIE LAIT/DANONE (2)	↓	AJANTA (6)	AJANTA (6,9%)
7	B (BLOOD) (16)		6	↑	ARTEFAN/AJANTA (2)	↔	PIERRE FABRE MEDIC (5)	OLEA (7,7%)
8	V (VARIOUS) (12)		40	↔	MAG 2/COOPER (2)	↔	NOVARTIS PHARMA (5)	DENK PHARMA (5,5%)
9	M (MUSCULO) (11)		20	↓	AUGMENTIN/GSK (2)	↔	SERVIER (5)	NOVARTIS PHARMA (5,5%)
10	G (GU SYST) (10)		24	↑	PHOSPHATINE/DANONE (2)	↔	DENK PHARMA (5)	UBI (4,5%)

- **Efferalgan (paracetamol)** continues to be the top selling product however it has lost 22% (\$1Mn) sales over last year. BMS has lost 20% of its total sales during this period
- **Anti-infectives** lead the market with 16% share however it has lost ~\$1.8 Mn over last year
- **Danone's** growth can be attributed to its top products **Nursie Lait (34% PPG)** and **Phosphatine (43% PPG)** which also featured among top 10 brands.

\* Institutional sales are not covered

Source: IQVIA Audited Data, MAT Q1 2019, includes IQVIA private, LPO, institutional data where available; Value sales at ex-factory price level without discount

b. : Base period MAT Q1 2018 Sales

1. New launches are classified as products launched in MAT Q1 2019 and have sales for the first time in this reporting period

2. Arrows indicate change in ranking in reference to its ranking in the previous MAT (MAT Q1 2019 vs MAT Q4 2018)

3. Number in brackets shows MAT Q1 2019 values sales in Million USD\$

4. Fastest growing corporations among the top 30 corporations by value sales



# Kenya Pharma market has reached ~ \$249 Mn in MAT Q1 2019 growing at ~5% over last MAT

Key Statistics	Market Size (US\$,M)	PPG (US\$) (MAT Q1 2018 - 2019)	Retail vs Institutional Split (US\$)
	249	5.4%	40:60 <sup>1</sup>

	Top TA's (\$USD, M)		New launches <sup>1</sup>		Top products/selling corp (product sales M\$) <sup>2,3</sup>		Top corporations (M\$) <sup>2,3</sup>	Fastest growing corps <sup>4</sup> (M\$, PPG)
1	J (ANTI-INF) (64)		44	↔	AUGMENTIN/GSK (6)	↔	GSK (27)	VITABIOTICS (3,49%)
2	A (ALIMENT) (48)		71	↑	ZINNAT/GSK (4)	↑	DAWA (13)	JANSSEN-CILAG (3,26%)
3	N (NERVOUS) (26)		23	↓	NEXIUM/ASTRAZENECA (3)	↓	PFIZER GLOBAL PH (13)	SERVIER (3,26%)
4	R (RESPIR) (25)		29	↔	ROCEPHIN/ROCHE (3)	↑	GSK CHC (10)	COSMOS (9,26%)
5	C (CARDIO) (21)		24	↔	CLEXANE/SANOFI GEM (2)	↑	GLENMARK (9)	GLENMARK (9,25%)
6	M (MUSCULO) (15)		15	↑	TREVIAMET/GETZ PHARMA (2)	↓	NOVARTIS (9)	GETZ PHARMA (8,24%)
7	G (GU SYST) (9)		17	↑	DAWAFLOX/DAWA (2)	↔	SANOFI GEM (9)	SQUARE (4,23%)
8	B (BLOOD) (8)		23	↑	MERONEM/PFIZER GLOBAL PH (2)	↓	ROCHE (9)	ROCHE (9,20%)
9	D (DERMA) (8)		15	↓	GALVUS MET/NOVARTIS (2)	↓	COSMOS (9)	SANOFI CHC (3,18%)
10	P (PARASITO) (7)		10	↑	ZITHROMAX/PFIZER GLOBAL PH (2)	↓	ASTRAZENECA (8)	J & J.OTC (3,18%)

- Top 4 TAs account for 65% of total sales in Kenya. There have been 316 new launches across all TAs generating ~\$3.4 Mn in 2019
- Top 10 corporations contribute to 47% of total sales with **GSK** leading the market having 11% share in sales however it has experienced slight decline of 3% over last year
- GSK's slowdown can be attributed to **decline in Augmentin's(amoxi+clavu) sales by 14%** over last MAT

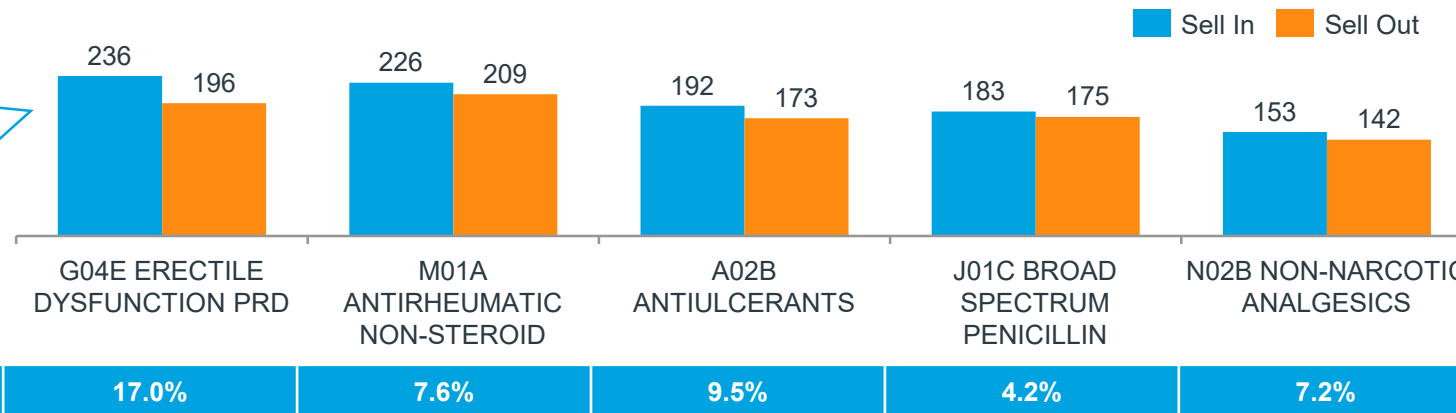
Source: IQVIA Audited Data, MAT Q1 2019, includes IQVIA private, institutional data where available;  
Value sales at ex-factory price level without discount

1. Private vs. Public ratio is based on overall market estimates and not using IQVIA data
2. Arrows indicate change in ranking in reference to its ranking in the previous MAT (MAT Q1 2019 vs MAT Q4 2018)
3. Number in brackets shows MAT Q1 2019 values sales in Million USD\$
4. Fastest growing corporations among the top 30 corporations by value sales

# In KSA, on an average 10.7% of products by value are stocked in pharmacy chains

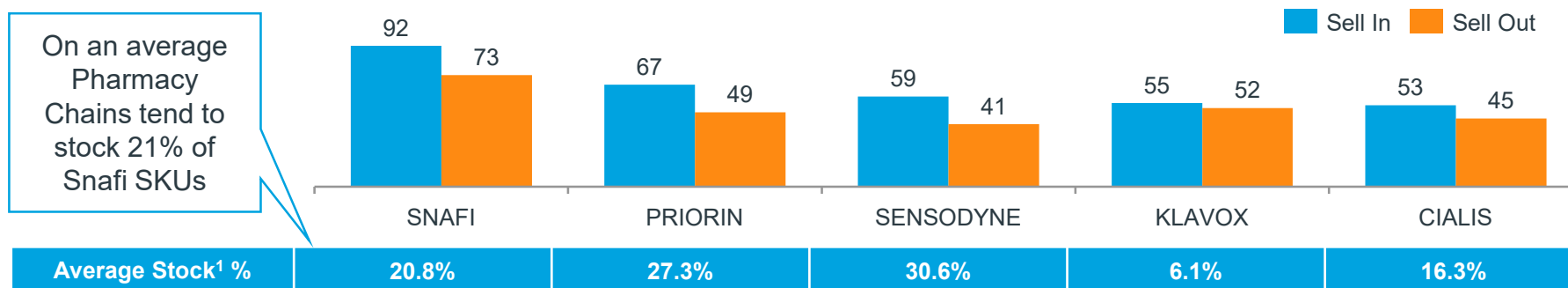
Sell-in vs. Sell-out for Top 5 TAs in KSA, across 4 years<sup>3</sup>, \$USD Mn

Difference in Sell-in and Sell-out = **Average Stocking**



Sell-in vs. Sell-out for Top 5 Products in KSA, across 4 years<sup>3</sup>, \$USD Mn

On an average Pharmacy Chains tend to stock 21% of Snafi SKUs



Sell-in vs. Sell-out Retail<sup>2</sup> Market Across 4 Years<sup>3</sup>, \$USD Mn



1. Average Stock indicates (Sell In – Sell Out), data compared for the 9 chains where we have sell-Out data  
 2. Sell-out market based on 9 Big Pharmacy chains in KSA Retail Chains Market that cover about 90% of KSA Pharmacy Chains Market  
 3. Time Period: Jan 2015 to Mar 2019; Source: IQVIA Data; Value sales at ex-factory price level without discount

# Table of Contents

- + Newsletter Report Summary
- + New IQVIA Initiatives
- + Regional Summary and Analysis
- + Regular Country Level Analysis
- + Additional Countries analysis
- + **Appendix**

# Scope of the report (Regional and Regular countries )

<b>Middle East &amp; Africa</b>	KSA, UAE, Kuwait, Lebanon, Jordan, Egypt, Algeria, Morocco, Tunisia, Fr. West Africa, South Africa
<b>Data Coverage</b>	KSA: <b>Private, Tender &amp; LPO</b> UAE, Kuwait: <b>Private &amp; LPO</b> Egypt: <b>Private, MoH &amp; semi-governmental</b> Fr. West Africa, Jordan, Lebanon, Algeria, Morocco: <b>Private</b> South Africa, Tunisia: <b>Retail &amp; State Hospital</b>
<b>Focus</b>	Time Period: MAT Q1 2015 to MAT Q1 2019 <sup>1</sup> Measures: Value (US\$) and Volume (Units) Analysis conducted at constant exchange rates and at ex-factory price level <sup>2</sup>  Exchange rates per 1 \$USD: <ul style="list-style-type: none"> <li>• Algeria: 118.96 DZD</li> <li>• Egypt: 17.61 EGP</li> <li>• Fr. West Africa: 0.88</li> <li>• Jordan: 0.71 JOD</li> <li>• Kuwait: 0.30 KWD</li> <li>• Lebanon: 1,507.49 LBP</li> <li>• Morocco: 9.55 MAD</li> <li>• Saudi Arabia: 3.75 SAR</li> <li>• South Africa: 14.01 ZAR</li> <li>• Tunisia: 3.01 TND</li> <li>• UAE: 3.67 AED</li> </ul>
<b>Report Release Date</b>	Sep 2019
<b>Analytical Timeframe</b>	MAT Q1 2019

*This report now also includes analysis on **additional countries** in Middle East and Africa region (**see next slide**). However, Regional summary analysis and Market Insights Snapshots are provided only for Regular countries due to historical data limitations in additional countries*

*Additionally, the report includes analysis on **Saudi sell-out data***

1. Time period of analysis varies for different countries subject to historical data availability; exact time period of analysis is mentioned on the slide of respective country
2. Converted from other price levels to ex-factory by using applicable discount factors

# Scope of the report (Additional Countries)

<b>Middle East &amp; Africa</b>	Bahrain, Cote d'Ivoire, Kenya, Senegal
<b>Data Coverage</b>	Cote d'Ivoire, Kenya, Senegal: <b>Private</b> Bahrain: <b>State and Private</b>
<b>Focus</b>	Time Period: MAT Q1 2015 to MAT Q1 2019 <sup>1</sup> Measures: Value (US\$) and Volume (Units) Analysis conducted at constant exchange rates and at ex-factory price level <sup>2</sup>  Exchange rates per 1 \$USD: <ul style="list-style-type: none"><li>• Bahrain: 0.38</li><li>• Cote d'Ivoire: 0.86</li><li>• Kenya: 102.0</li><li>• Senegal: 0.86</li></ul>
<b>Report Release Date</b>	Oct 2019
<b>Analytical Timeframe</b>	MAT Q1 2019

1. Time period of analysis varies for different countries subject to historical data availability; exact time period of analysis is mentioned on the slide of respective country
2. Converted from other price levels to ex-factory by using applicable discount factors

# Key Terminologies used in the report

<b>PPG</b>	Previous Period Growth: Growth over last MAT i.e. MAT Q1 2018 vs. MAT Q1 2019 growth
<b>CAGR</b>	Compound Annual Growth Rate for period MAT Q1 2015 to MAT Q1 2019
<b>MAT</b>	Moving Annual Total: Period considering the last 12 months from the available period, values at MAT level are rolling yearly sum
<b>Local/Reg Companies</b>	Companies having operations limited to Middle East and Africa region, Indian companies, other smaller companies having niche portfolio. For e.g. Hikma, SPIMACO, Cipla, Adcock Ingram, Aspen
<b>MNCs</b>	Large companies having global presence with diverse portfolio and having headquarters in developed markets such as US, EU, Japan. For e.g. Pfizer, Novartis, Takeda, GSK, Roche

# Please contact us for more information



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**Thank You**

