Middle East & Africa Pharmaceutical Business Insights

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Agenda

- **Newsletter report summary**
- Regional summary and analysis
- Spotlight on new offering
- Appendix

Business insights snapshot MAT Q1 2026: Many countries have witnessed high growth in 2026

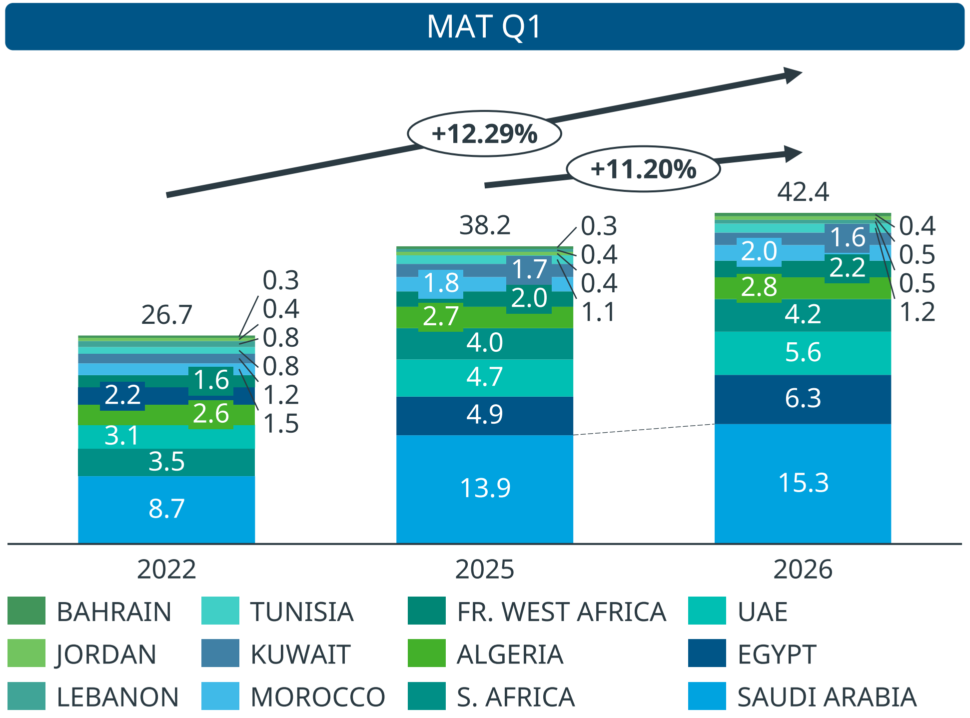
- Overall, MEA Pharmaceutical Business has reached **$42.43 B value** and **9.3 B Units**
- Value sales growth has been at **11.20% PPG[1] (Previous Period Growth) and 12.29% CAGR[2]** while Volume sales has increased at **4.53% PPG &** at **1.92% CAGR[2]**

- **Retail channel** dominates the region with **67.7% ($28.72 B)** value sales share and **10.78% PPG** and volume share of **81.6% (7.6 B Units)** with **4.43% PPG**
- **Growth of Hospital channel** has increased in terms of **PPG 12.09%** in value and **4.96% PPG** in volume

- **MNCs** lead with **54.93%** share in total value sales with **8.17% PPG**
- **Local** companies have grown at **15.12%** PPG in value and **6.69%** PPG in volume

- **Novartis, Sanofi** and **GSK** continue to be the top MNC corporations in MEA contributing 22.0% to total MNC Sales
- **Amongst the top 10 corporation, Hikma** is the fastest growing corporation growing at **21.58%** PPG

- **Alimentary Tract, Metabolism** is the top TA holding **20.7%** of value share with the highest contribution share from **KSA** at **35.2%**



- Saudi Arabia leads the MEA region at **$15.35 B** in value, expanded at **10.1% PPG** in value terms
- UAE follows as the 2nd largest*, with **$5.56 B** in value has seen a growth of **17.1% PPG and 15.8% CAGR[2]**

[1]PPG: Previous Period Growth: MAT Q1 2025 vs. MAT Q1 2026 growth; [2]CAGR: Compound Annual Growth Rate for the period *MAT Q1 2022 to MAT Q1 2026;*
Source: IQVIA Audited Data, MAT Q1 2026 includes IQVIA private, LPO, Institutional data where available; Analysis based on Algeria, Egypt, Fr. West Africa, Jordan, Kuwait, Lebanon, Morocco, Saudi Arabia, South Africa, Tunisia, UAE and Bahrain; Value sales at ex-factory price level without discount; All sales are at constant exchange rate and don't account for any currency fluctuation or devaluation

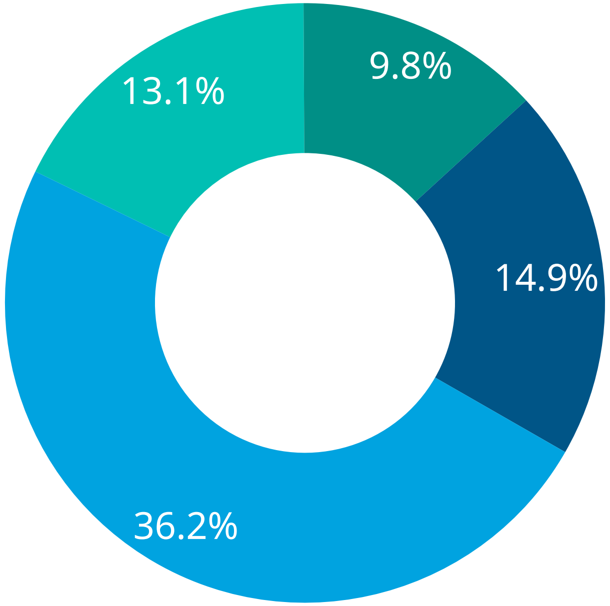
Among the key countries, KSA saw growth of 10.11% and continues to lead, accounting for 36.2% of sales in MEA Region

United Arab Emirates (UAE)

- **UAE grew by 17.12% PPG (Fastest growing country in MEA region**) accounting for $5.56 B sales**
- **Top 10 TAs** account for **48.6%** of total sales, wherein **Interlukin is growing at 35.1% PPG**
- **Top 10 corporations** account for **47.04% share** in sales with **Julphar** being the fastest growing at **45.4% PPG**; mainly driven by top brands like **Adol (62.6%)**, **Triaxone (17.5%)**, and **Pantonix (154.8%)** on PPG

Saudi Arabia (KSA)

- **Saudi Arabia has grown by 10.11% PPG, with sales valued at $15.35 B**
- **Hospital channel (Hospitals + LPO) grew by 9.18% PPG** and accounting for **49.9% of total sales**
- **Top 10 corporations** account for **43.2%** share in sales**.** **Hikma Pharma** is leading with **7.32%** share and is fastest growing corporation at **25.7%** PPG
- Hikma is driven by top brands like **Amoclan (21.3%), Omeral (75.4%), Remsima (32.8%) and Torvast (134.8%) on PPG**



South Africa[1]

- **South Africa has grown by 3.06% PPG accounting for $4.2 B sales** with the **retail channel accounting for 85.2% of total sales**
- **Cough & Cold Preparations TA continues to be Top TA at with 6.1% share**
- **Top 10 corporations** account for **49.74%** share in sales. **Adcock Ingram**, a local firm, is leading with **1.9%** PPG and **Austell Corp.** being the fastest growing at **10.1%** PPG

Egypt (EGY)*

- **Egypt volume sales has increased by 6.87% PPG** driven by growth from **Retail channel (5.13% PPG) accounting for 81.0% of country's Units sales**
- **Systemic Antibacterials** is the top TA in Egypt with **10.1%** Units share while **Anti-Ulcerants (11.6% PPG) is the fastest growing** amongst the top 10 TAs (Exc. Non Therapeutics)
- **Top 10 corporations account for 38.7% share** in volume sales, **Pharco is leading** the sales with **7.8% share and Marcyrl is** the fastest growing corporation among top 10 corps **(20.8% PPG)**

Source: IQVIA Audited Data, MAT Q1 2026 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: 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 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 2019-2020
*in Egypt, we updated the insights based on sales units; **Egypt grew by 27.68% PPG in terms of sale value; ** Excluding Bahrain, Egypt and Lebanon**

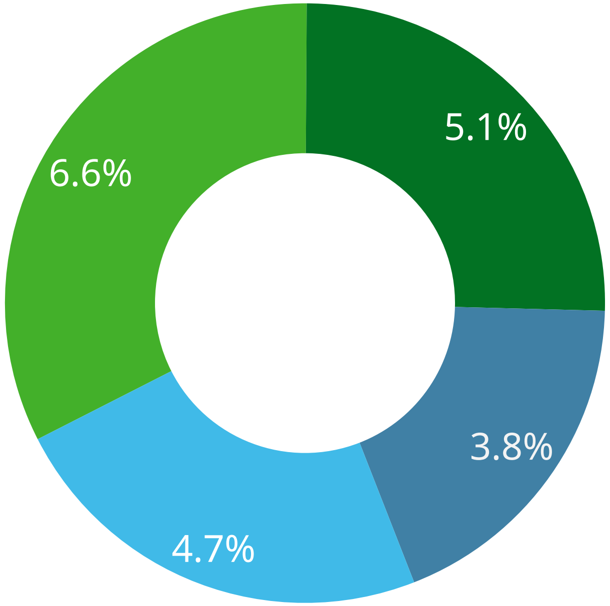
Algeria business in MEA is growing at 1.49% PPG mainly driven by local/regional players with 5.52% PPG

Algeria (ALG)

- **Algeria retail channel sales increased by 1.49% PPG** accounting for **$2.78 B** sales in MAT Q1 2026
- **Top TAs** are **Antihypertensives** (**9.0% PPG**) and **Insulin & Analogs** (**1.8% PPG**). **Traditional Type II Antidiabetes** is the 2nd fastest growing at **7.0% PPG** amongst the top 10 TAs (excl. NonTherapeutics)
- **MS Pharma is the top corporation** with **7.23% of sales share** and **Biocare Biotech SP** is fastest growing (51.5% PPG) among the **top 10** corporations
- Amongst the top products of **MS Pharma** like **Exval (-1.0% PPG), Arovan (-7.6% PPG), and Unirox (11.3% PPG)**

Morocco (MOR)

- Morocco retail channel has **increased by 6.82% CAGR and 9.0% PPG accounting for $2.0 B sales in** MAT Q1 2026
- This increase in sales is mainly attributed to **Local/Regional corps** that have **grown by 9.72% PPG. MNCs** have **grown by 8.33%** PPG while accounting for **51.24% of total sales**
- Amongst the top 10 corporations, **Bottu SA** continues to lead, with **5.39% share** in MAT Q1 2026. **Sothema** is the fastest growing amongst top 10 at **19.0%** PPG
- Amongst the top products of **Sothema, Novex (PPG 10.3%) Zenetiamet (PPG 148.0%) and Ofiken (PPG 3.2%) ; these are contributing to 29.9% of Sothema value sales in MAT Q1 2026**



Fr. West Africa (FWA)

- **FWA retail channel has grown by 9.63% PPG accounting for $2.16 B sales in** MAT Q1 2026
- **Local/Regional players** grew by **12.42% PPG** while accounting for **56.26% of total sales**
- Amongst the top 10 corporations, **Ajanta** is the **top** selling corporation with **4.49% share** while **Generic Healthcare is the fastest growing top corporation at 34.0% PPG** amongst the top 10 corporations.
- **Generic Healthcare** growth is driven by top products like **Amloperin (33.2% PPG), Ramithiazide (17.6% PPG) and Richfer (70.1% PPG)**

Kuwait (KWT)

- **Kuwait sales decreased by -6.36% PPG accounting for $1.59 B sales** driven by hospital channel with **74.0% Share**
- **Top 10 corporations** account for **50.27%** share in sales with **Eli Lilly,** leading the business with **7.50%** share and decreased by **-3.17%** PPG. **Astrazeneca (0.82% PPG)** is the 2nd and **Novartis at PPG -13.63%** the 3rd largest share holding **(6.31%)** among top 10 corporations
- **Eli Lilly** growth is driven by products like **Mounjaro (29.7%)**, **Verzenio (32.5%)** and **Cialis (-7.8%)** PPG. These Top 3 products contribute to 87.4% of **Eli Lilly** Sales in MAT Q1 2026

Source: IQVIA Audited Data, MAT Q1 2026 includes IQVIA private, LPO, Institutional data where available; Value sales at ex-factory price level without discount; All sales are at constant exchange rate and don't account for any currency fluctuation or devaluation

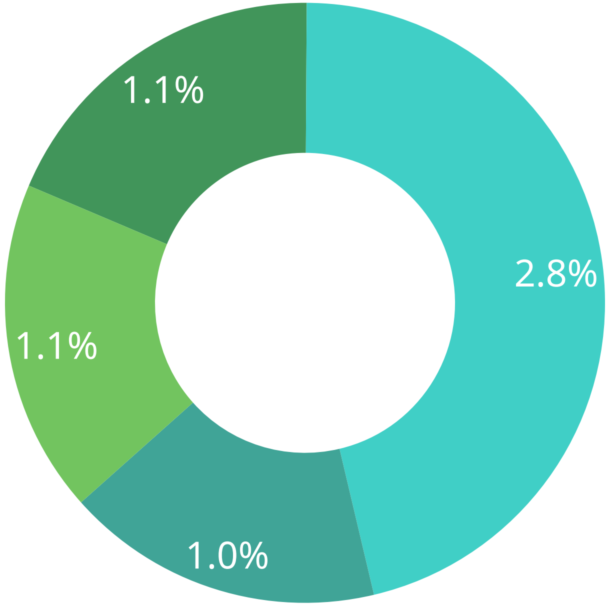
Tunisia is growing at 7.29% PPG in MEA region

Lebanon (LEB)*

- Lebanon retail channel unit sales increased by **14.10% PPG** at **0.1 B** unit sales in **MAT Q1 2026**
- **GSK** is leading the Lebanon, with **10.3% share and14.6% PPG and Bayer** is the fastest growing corporation with **31.3% PPG** amongst the top 10 corporations
- **Top 10 products for Bayer contribute 82.7%** of the total Units sales amongst which **Aspirin (75.9%), Microgynon 30 (8.6%), and Bepanthen (20.0%) PPG** are high contributing products

Jordan (JOR)

- Jordan retail channel sales increased by **3.61% PPG** accounting for **$0.45 B** in **MAT Q1 2026**
- Amongst the top 10 TAs, **Anti-Epileptics** is the fastest growing TA with **22.4% PPG**
- **Hikma is leading the business with 8.57% share**, sales has **increased by 4.77%** in MAT Q1 2026. **Novartis** has registered fastest growth of **21.36%** PPG among the top 10 corporations
- Top sales contributing products for **Novartis** includes **Co-diovan (77.5% PPG), Voltaren (19.5% PPG)** and **Exforge HCT (31.5% PPG)**



Tunisia (TUN)

- **Tunisia** has grown by **7.29% PPG** accounting for **1.17 B** sales in **MAT Q1 2026;**
- **Hospital & Retail** channel grew by **8.95% and 6.62% PPG** respectively; **Retail channel** accounts for **71.2%** of total sales
- **Antihypertensive TA** lead the sales; accounting for **8.3%** share in sales
- **Medis** continues to be the leading corporation with **6.82% share. Roche (35.6% PPG)** and P**hiladelphia PH. (23.1% PPG)** are the fastest growing corporations amongst the top 10 players
- **Fastest growing products for Roche** include **Perjeta (35.8%), Ocrevus (33.7%)** and **Madopar (18.8%)** PPG

Bahrain (BHR)

- Bahrain sales increased by **25.57% PPG** accounting for **$0.43 B** in **MAT Q1 2026**
- Amongst the top 10 TAs, **Lipid Regulators** is the largest TA with **10.6% share**
- **Novartis** is leading the business with **7.71%** share a sales has **increased by 13.77%** in MAT Q1 2026. **National Pharm IND** has registered fastest growth of **1,727.7%** PPG among the top 10 corporations
- Top sales contributing products for **National Pharm IND** includes **Betaten (106924.8% PPG), Omcet (-77.8% PPG)** and **Torvast (248.7% PPG)**

Source: IQVIA Audited Data, MAT Q1 2026 includes IQVIA private, LPO, Institutional data where available; Value sales at ex-factory price level without discount; All sales are at constant exchange rate and don’t account for any currency fluctuation or devaluation; *due to hyperinflation situation in Lebanon, we updated the insights based on sales units

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By 2030, Global Pharma business is expected to reach LC$ 2.7 T; Middle East & Africa pharma business collectively to be LC$ 80.95 B

Highlights of IQVIA market prognosis 2026-2030 (May 2026)

Global
Size (2030): $ 2.7 T
CAGR '25-30': 6.75 %

Russia & CIS
- Size (2030): LC$ 61 B
- CAGR '25-30': 9.37%

Europe
- Size (2030): LC$ 592 B
- CAGR '25-30': 6.82%

North America
- Size (2030): LC$ 1,388 B
- CAGR '25-30': 7.49%

Japan
- Size (2030): LC$ 73 B
- CAGR '25-30': 1.15%

Middle East
- **Size (2030): LC$ 44 B**
- **CAGR '25-30': 6.99%**

Pharmerging
- Size (2030): LC$ 515 B
- CAGR '25-30': 6.42%

South East & East Asia
- Size (2030): LC$ 282 B
- CAGR '25-30': 2.97%

Africa
- **Size (2030): LC$ 37 B**
- **CAGR '25-30': 7.21%**

Indian Subcontinent
- Size (2030): LC$ 59 B
- CAGR '25-30': 8.87%

Major Developed
- Size (2030): LC$ 1,827 B
- CAGR '25-30': 6.87%

Latin America & Carrib.
- Size (2030): LC$ 153 B
- CAGR '25-30': 9.49%

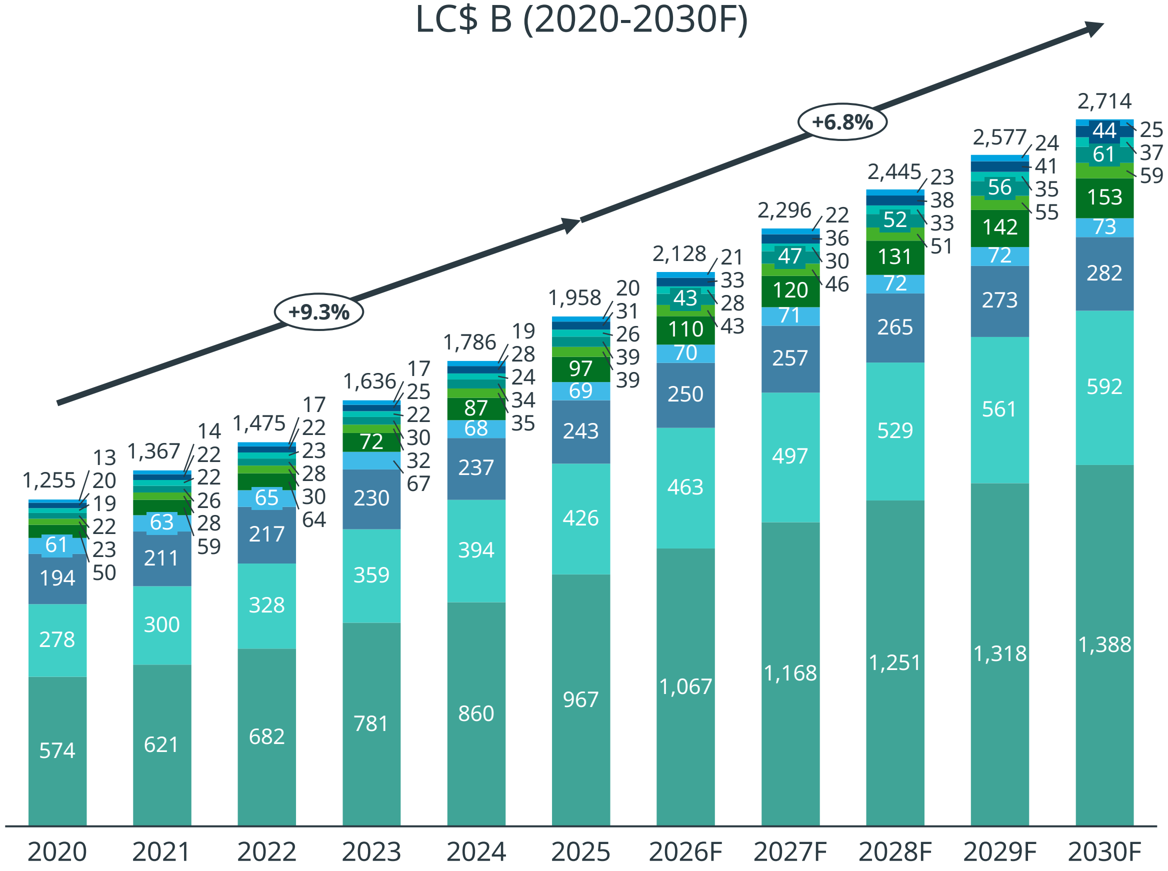
Oceania
- Size (2030): LC$ 25 B
- CAGR '25-30': 4.60%

Note – Size indicates 2030 Sales in LC $
Source: IQVIA Market Prognosis 2026-2030 (May 2026); IQVIA Market Prognosis Global summarizes the key points from each of the Regional studies and adds this to desk research conducted in seven other regions. A combination of IQVIA, official import/export and local manufacturer figures are used to compile this report and establish events that could impact the sales forecast over the period reviewed

Middle East & Africa pharma business is forecasted to reach LC$ 80.95 B in 2030 and is collectively growing at 7.09% (2020 through 2025)

Value sales by country (historical vs. forecasted)

LC$ B (2020-2030F)



Growth summary (Historic vs. Forecasted)

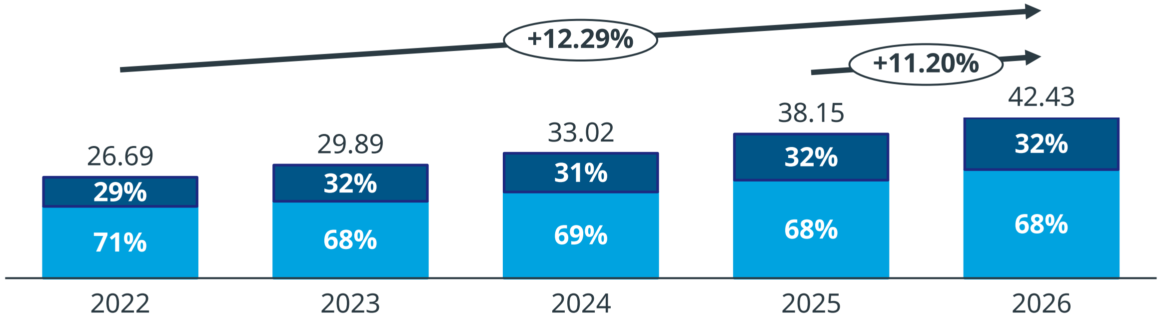
Regions	CAGR '20 - '25	CAGR '25 - '30
Oceania	8.5%	4.60%
Middle East	9.4%	6.99%
Africa	6.6%	7.21%
CIS	11.8%	9.37%
Indian Sub-Continent	10.8%	8.87%
Latin America, including the Caribbean	14.4%	9.49%
Japan	2.4%	1.15%
South-East & East Asia	4.6%	2.97%
Europe	8.9%	6.82%
North America	11.0%	7.49%
Global Pharma Business	***9.30%***	***6.75%***

Growth>=Global Growth<Global

Source: IQVIA Market Prognosis 2026-2030 (May 2026) and ex-Mfg. sales, LC$; IQVIA Market Prognosis Global summarizes the key points from each of the Regional studies and adds this to desk research conducted in seven other regions. A combination of IQVIA, official import/export and local manufacturer figures are used to compile this report and establish events that could impact the sales forecast over the period reviewed

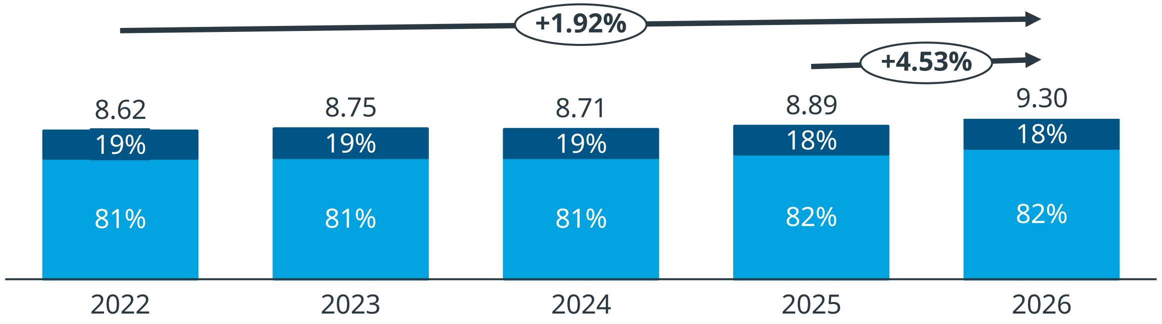
Both channels grew in their value growth in PPG with retail growing at 10.78% PPG contributing 68% of total value of MEA business

Total sales (USD, B)



	PPG %[1]	CAGR %[1]
Hospital	12.09%	15.45%
Retail	10.78%	10.92%
Total	**11.20%**	**12.29%**

Total sales (Units, B)

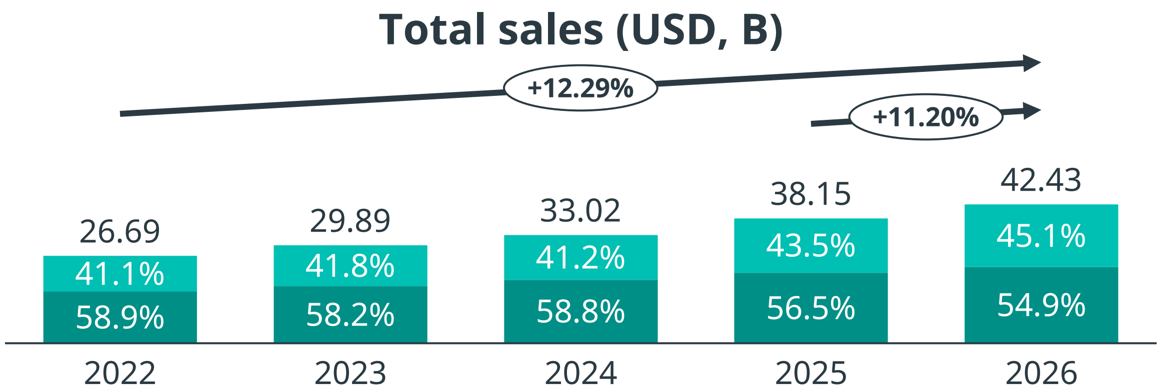


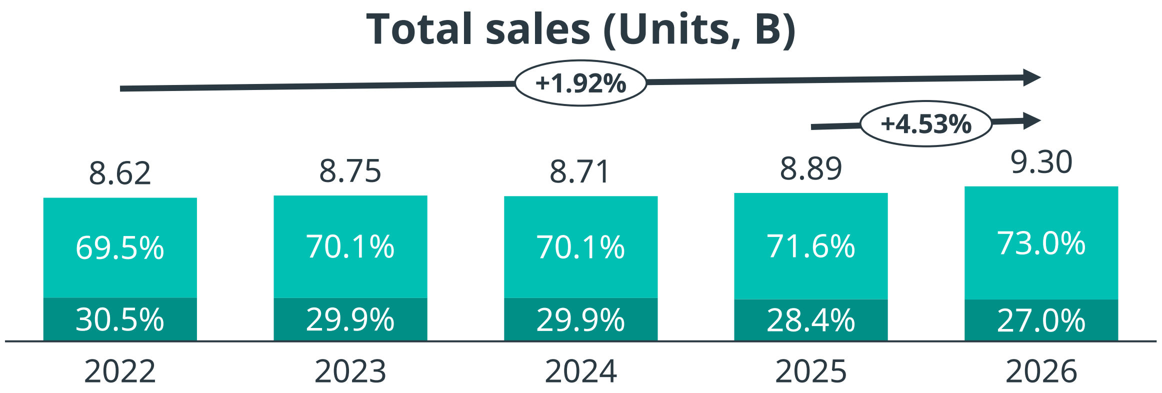
	PPG %[1]	CAGR %[1]
Hospital	4.96%	1.67%
Retail	4.43%	1.97%
Total	**4.53%**	**1.92%**

- **Retail is the dominant channel in the region accounting for 68% value sales in the region**
- **Hospital channel continues to have a stable value growth in the region with UAE and KSA growing by 34.0% & 9.2% PPG respectively**
- **The growth of retail channel can be majorly attributed to expanding size of overall business in MEA**

[1]PPG (Previous Period Growth) calculated for MAT Q1 2025 vs. MAT Q1 2026 and CAGR (Compound Annual Growth Rate) is calculated for MAT Q1 2022-2026
Note:Retail includes private hospitals and is available for all countries included
Analysis based on Algeria, Egypt, Fr. West Africa, Jordan, Kuwait, Lebanon, Morocco, Saudi Arabia, South Africa, Tunisia, UAE and Bahrain
Source: IQVIA Audited Data, MAT Q1 2026 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/regional companies continues to grow in value terms, however MNC still controls higher share in MEA





Hikma, Tabuk and Jamjoom are among the largest Local/Regional companies in collectively they generate value sales of $3.3 B and contribute 17.3% of the total sales generated by Local/Regional players in MEA

	PPG %	CAGR %
LOC/REG[1]	15.12%	14.93%
MNC[1]	8.17%	10.33%
Total	**11.20%**	**12.29%**

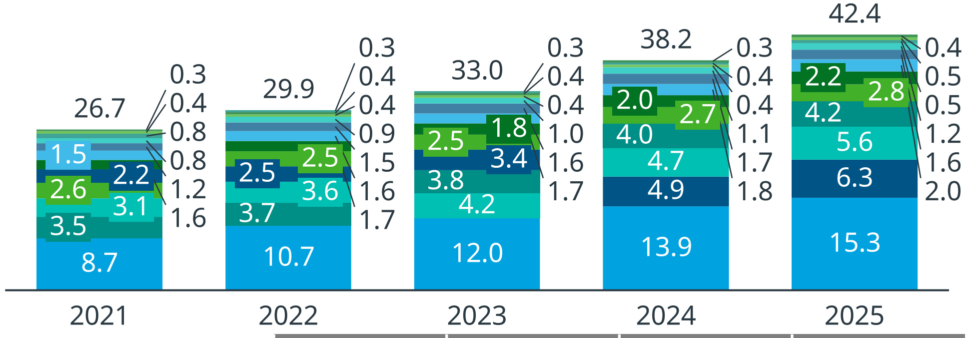
	PPG %	CAGR %
LOC/REG[1]	6.69%	3.19%
MNC[1]	-0.91%	-1.17%
Total	**4.53%**	**1.92%**

- Growth of **Local companies** in the region was mainly reflected in **KSA (17.3%), UAE (17.1%) and Kuwait (10.2%) PPG**
- Growth of **MNC companies** mainly reflected in **UAE (17.1%), Morocco (8.3%) and KSA (5.6%) PPG**

[1]MNC: Multinational companies, Loc/Reg: Local and Regional companies
Source: IQVIA Audited Data, MAT Q1 2026 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; Analysis based on Algeria, Egypt, Fr. West Africa, Jordan, Kuwait, Lebanon, Morocco, Saudi Arabia, South Africa, Tunisia, UAE and Bahrain

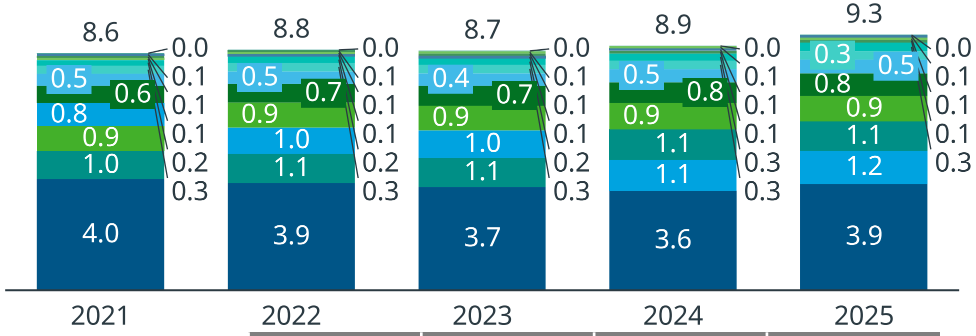
All MEA countries have continued to grow in value sales in MAT Q1

Total sales (USD, B)



	PPG	CAGR	R:I[1]	L:M[1]
KSA	10.1%	15.3%	50:50	41:59
EGY	27.7%	29.5%	69:31	57:43
UAE	17.1%	15.8%	70:30	22:78
RSA	3.1%	4.3%	85:15	59:41
ALG	1.5%	2.0%	100:0	69:31
FWA	9.6%	8.6%	100:0	56:44
MOR	9.0%	6.8%	100:0	49:51
KWT	-6.4%	6.7%	26:74	18:82
TUN	7.3%	8.6%	71:29	55:45
LEB	23.8%	-11.6%	100:0	47:53
JOR	3.6%	3.0%	100:0	48:52
BHR	25.6%	11.1%	25:75	30:70
Total	**11.2%**	**12.3%**	**68:32**	**45:55**

Total sales (Units, B)



	PPG	CAGR	R:I[1]	L:M[1]
KSA	6.6%	9.9%	69:31	66:34
EGY	6.9%	-1.0%	81:19	80:20
UAE	12.5%	10.2%	82:18	54:46
RSA	-3.3%	1.0%	59:41	82:18
ALG	-2.5%	0.2%	100:0	77:23
FWA	8.8%	7.1%	100:0	62:38
MOR	4.1%	2.5%	100:0	58:42
KWT	-9.6%	0.8%	44:56	34:66
TUN	2.4%	2.4%	86:14	68:32
LEB	14.1%	9.5%	100:0	53:47
JOR	0.7%	0.5%	100:0	56:44
BHR	35.5%	13.3%	42:58	60:40
Total	**4.53%**	**1.92%**	**82:18**	**73:27**

- **UAE & KSA** are among the fastest growing in **MEA** region in terms of values sales PPG
- **In KSA Value growth (10.1% PPG)** Retail channel growth (11.0%) is high compared to hospital channel growth (9.2%)
- **Volume growth in KSA** is mainly driven by **Local players** with **9.4% PPG and 66.1%** Volume **share**

Middle East & Africa

[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 and Bahrain; **Source:** IQVIA Audited Data, MAT Q1 2026 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

Alimentary tract treatment products is the largest TA in MEA; L – Antineoplast + Immunomodul Organs is fastest growing TA among top TAs

Top selling Therapy areas (ATC1s)

PPG%	CAGR%	Ranking change		Sales (USD, B) MAT Q1 2026		R:I	L:M
12.4%	14.3%	↔	1	A (ALIMENTARY TRACT,METABOL)	8.8	80:20	43:57
5.3%	8.7%	↔	2	J (SYSTEMIC ANTI-INFECTIVES)	5.1	53:47	53:47
18.9%	19.2%	↔	3	L (ANTINEOPLAST+IMMUNOMODUL)	4.5	28:72	16:84
9.0%	8.7%	↔	4	N (NERVOUS SYSTEM)	4.0	72:28	55:45
16.8%	11.4%	↔	5	C (CARDIOVASCULAR SYSTEM)	3.8	71:29	51:49
6.3%	11.2%	↔	6	R (RESPIRATORY SYSTEM)	2.9	83:17	58:42
15.5%	11.9%	↑ 1	7	B (BLOOD + B.FORMING ORGANS)	2.3	49:51	42:58
10.0%	13.4%	↓ -1	8	M (MUSCULO-SKELETAL SYSTEM)	2.3	78:22	52:48
12.4%	11.3%	↑ 1	9	G (G.U.SYSTEM & SEX HORMONS)	1.9	88:12	56:44
7.7%	11.9%	↓ -1	10	D (DERMATOLOGICALS)	1.9	85:15	48:52

- **Alimentary tract products continues to be the leading TA in MEA region accounting for 20.7% the region sales**
- **KSA accounts for 35.2%** share in total **Alimentary tract** sales in MEA, while recording growth of **7.75%** PPG in value
- **Antineoplast + immunomodul** has grown at 18.9% PPG, where 62.6% of total TA MEA sales contributed by **KSA** and **UAE** growing at a PPG of **19.49% & 29.23%** respectively in this TA

Middle East & Africa

[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 year (MAT Q1 2025 vs. MAT Q1 2026)
Analysis based on Algeria, Egypt, Fr. West Africa, Jordan, Kuwait, Lebanon, Morocco, Saudi Arabia, South Africa, Tunisia, UAE and Bahrain
Source: IQVIA Audited Data, MAT Q1 2026 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

Agenda

- Newsletter report summary
- Regional summary and analysis
- **Spotlight on new offering**
- Appendix

IQVIA ME Data Coverage

More than 200 collaborating Data Suppliers in the ME region covering 9 countries

98% actual
Egypt

98% actual
Saudi Arabia

98% actual
UAE

85% actual
Jordan

85% actual
Lebanon

95% actual
Kuwait

75% coverage
Bahrain

Iraq *(new)*
In collaboration with AMS Analytix

Oman *(new)*
Coming soon

Qatar *(Launched)*
In Q2 2024

Iraq pharmaceutical market

Providing a strategic view of the Iraq Retail market to drive strategy and business insights

Sell-in data

65% collected as actual (censes) sales from 35 collaborating distributors/suppliers to pharmacies, in addition to 35% projected data from 400 pharmacies

National, regional & territorial

- Baghdad
- Kurdistan
- Center
- Furat Awsat
- South
- North

18 Governorates

Audit available in flexview

4 levels of ATC classification

Attributes

Manufacturer
Product
NFC
Pack
Measures
Product form classification

Back data

available from Jan 2022

Sectors

Cover all products sold within pharmacies

Frequency

The audit is released on a quarterly basis

Unit and value sales

Price level

Trade price

New Offering

ESWT: Egypt switch tracker

Launch Jan-2024

Methodology

- Gathering input from sample potential pharmacies
- Record all details regarding specific Therapy Areas for 7 consecutive days though a digital platform

Sample/time frame

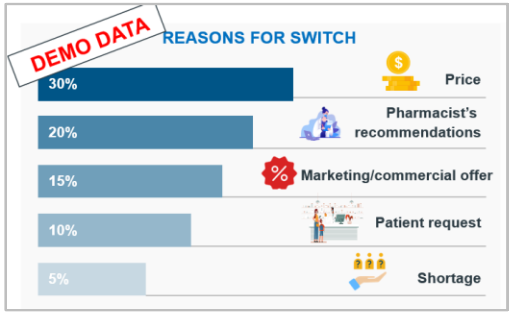
- Sample of 400 pharmacies **(Individual/street ph)** distributed through 4 regions (Cairo/Giza –Delta-Upper Egypt-Alexandria)
- Data collected in **2 waves/year**
- Reports will be published semester basis

Project scope

- Country: Egypt
- Launch new syndicated offerings which target pharmacies' behavior within their pharmacies

Deliverables/KPI

- The Dispensing split % of my brand (OTC/RX)
- The Switch rate % of my brand vs. the competitors
- Pharmacist Role: The reason behind the switches
- Who are the main competitors; "switched to"
- Regional performance for switches

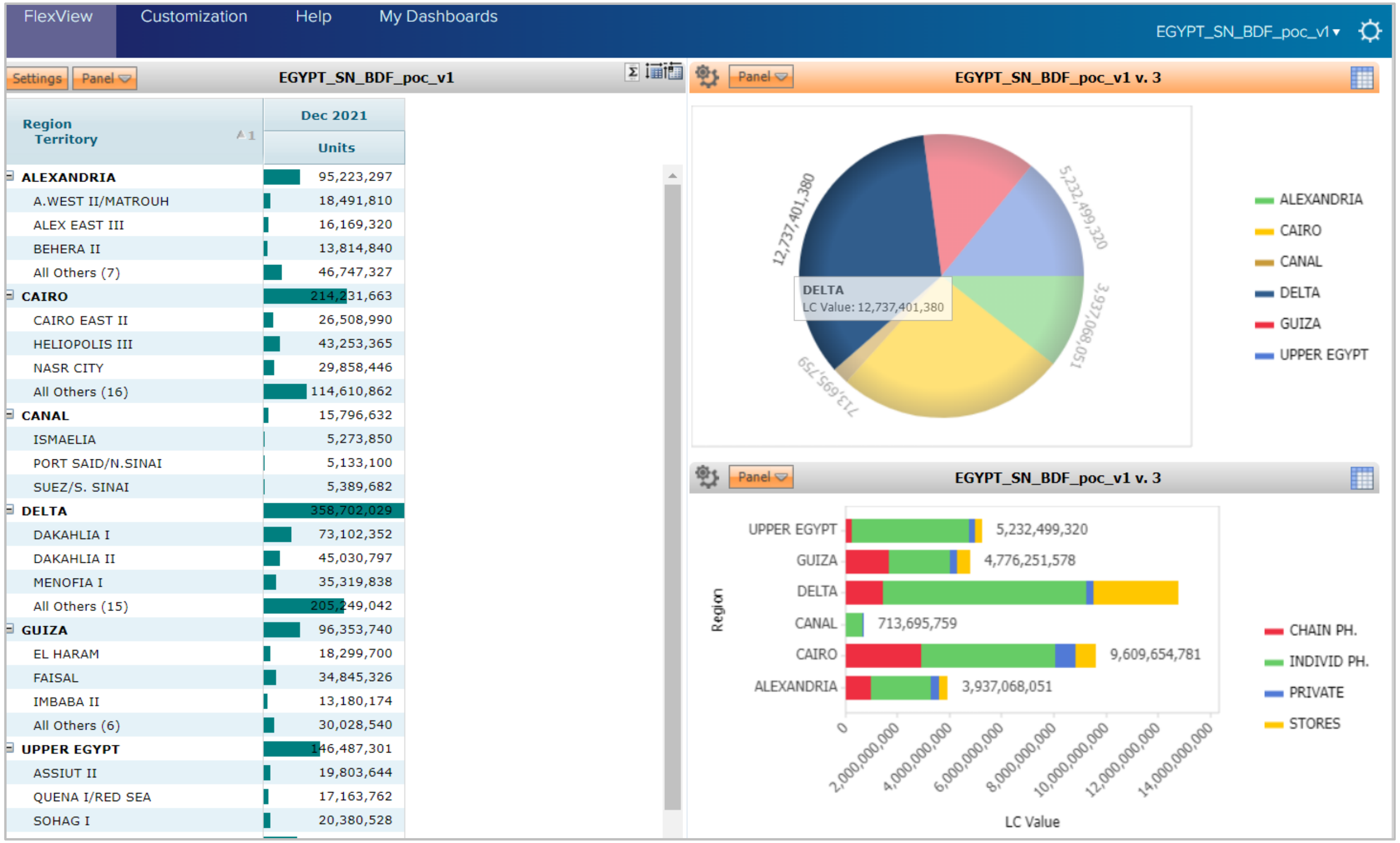


New Offerings

SSS: Sub national sector split flexview

- Due to market dynamics, IQVIA Egypt launch new structure for territorial data
- Now you can have deeper insightful analysis through split of existing territorial data to more granular level of main channels: Individual Pharmacies, Chain Pharmacies, Stores and Private Hospitals

Launch Q2-2024



Region / Territory	Dec 2021 Units
ALEXANDRIA	95,223,297
A.WEST II/MATROUH	18,491,810
ALEX EAST III	16,169,320
BEHERA II	13,814,840
All Others (7)	46,747,327
CAIRO	214,231,663
CAIRO EAST II	26,508,990
HELIOPOLIS III	43,253,365
NASR CITY	29,858,446
All Others (16)	114,610,862
CANAL	15,796,632
ISMAELIA	5,273,850
PORT SAID/N.SINAI	5,133,100
SUEZ/S. SINAI	5,389,682
DELTA	358,702,029
DAKAHLIA I	73,102,352
DAKAHLIA II	45,030,797
MENOFIA I	35,319,838
All Others (15)	205,249,042
GUIZA	96,353,740
EL HARAM	18,299,700
FAISAL	34,845,326
IMBABA II	13,180,174
All Others (6)	30,028,540
UPPER EGYPT	146,487,301
ASSIUT II	19,803,644
QUENA I/RED SEA	17,163,762
SOHAG I	20,380,528

New Offerings

Autoimmune diseases is one of the key therapy areas driving the continuous growth of biologics as a therapy class

How do healthcare stakeholders use autoimmune prescription data today?

Key business questions

How do prescriptions and standard of care differ across countries?

How is the competitive landscape evolving?

How is my brand being prescribed in the real-world setting?

How do prescriptions differ by line of therapy or degree of severity?

Autoimmune + MS Insights is a cross-sectional survey collecting prescription data from a representative panel of physicians and it covers…

Geographies

France, Spain, UK, Saudi Arabia

Diseases

13 diseases: Rheumatoid arthritis, Juvenile arthritis, Axial Spondyloarthritis, Ankylosing Spondylitis, Psoriatic arthritis, Systemic lupus erythematosus, Ulcerative colitis, Crohn's disease, Plaque psoriasis, Hidradenitis Suppurativa, Non-radiographic axial spondyloarthritis, Axial spondvloarthritis, Multiple Sclerosis

Physician specialties

Hospital-based dermatologists, gastroenterologists, rheumatologists, neurologists

Variables

- **Prescription** and co-prescription
- **Diagnosis** and co-diagnosis (ICD-10)
- Treatment **dosing and duration**
- **Patient demographics**
- Time from diagnosis to **biological treatment**

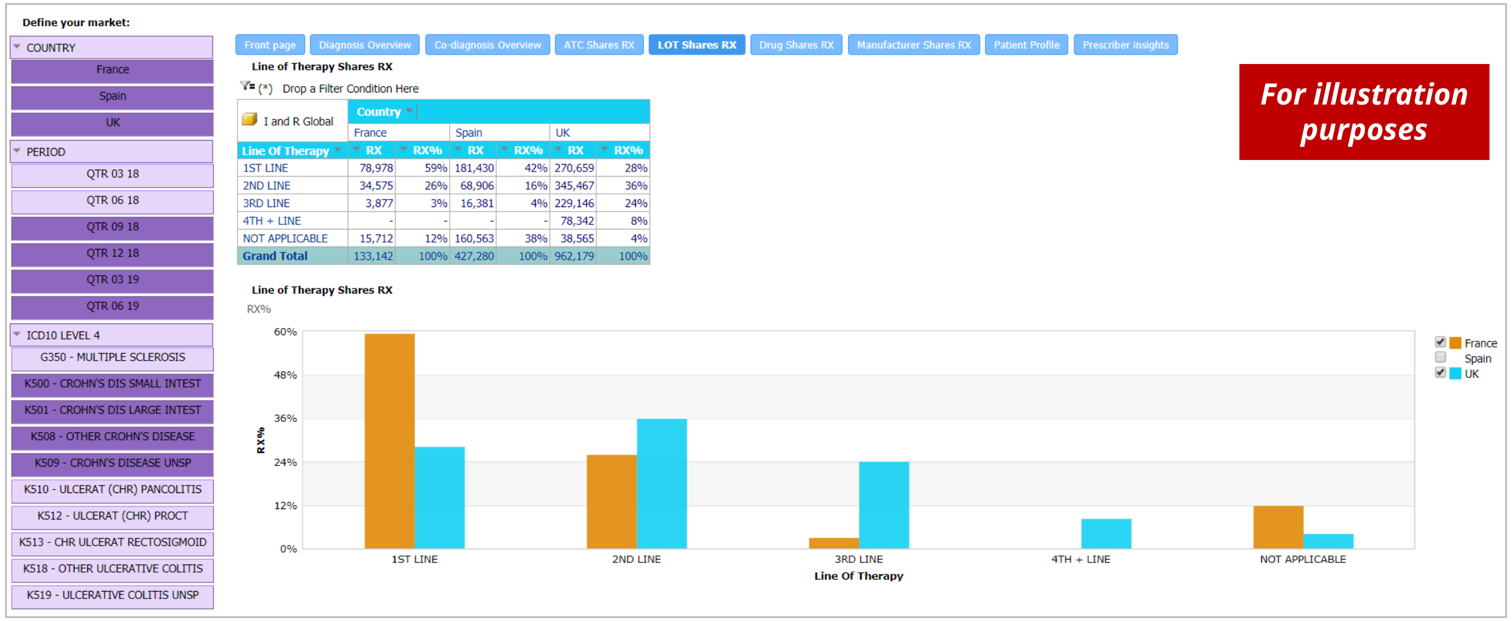
All patient data are de-identified and comply with relevant rules for patient privacy protection

Autoimmune + MS Insights – IQVIA 2022

Diagnosis insights autoimmune – Get easy access to the best-in-class reports and visualizations with fully dynamic functionality

Entry 1: Diagnosis insights: entry by disease

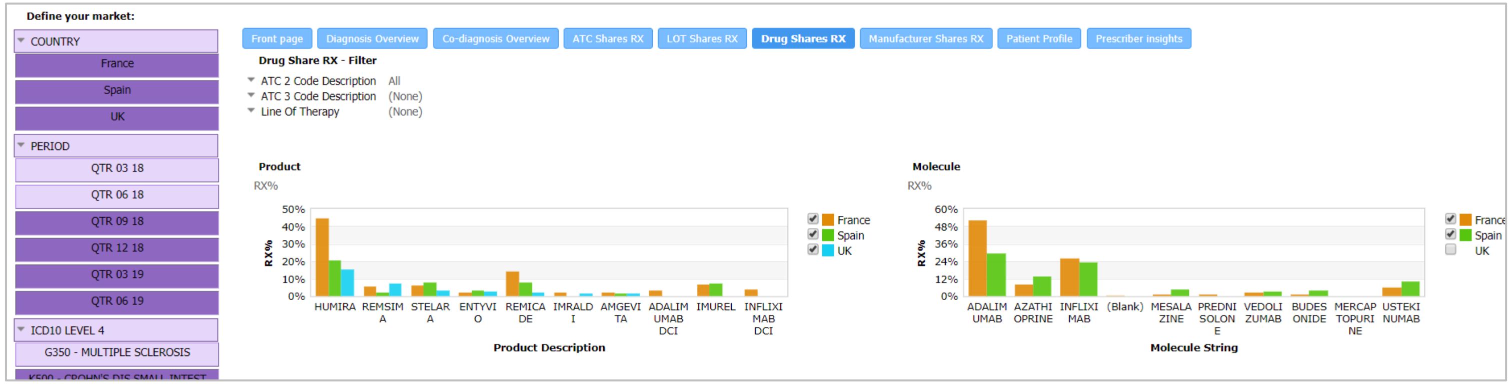
- Diagnosis
- Co-diagnosis
- ATC
- Line of therapy
- Co-RX
- Manufactures
- Patient profile
- Prescriber



Line Of Therapy	France RX	France RX%	Spain RX	Spain RX%	UK RX	UK RX%
1ST LINE	78,978	59%	181,430	42%	270,659	28%
2ND LINE	34,575	26%	68,906	16%	345,467	36%
3RD LINE	3,877	3%	16,381	4%	229,146	24%
4TH + LINE	-	-	-	-	78,342	8%
NOT APPLICABLE	15,712	12%	160,563	38%	38,565	4%
Grand Total	133,142	100%	427,280	100%	962,179	100%

Entry 2: Prescription/drug insights

- Patient profile
- Product
- Co-RX
- Line of therapy
- Key Disease and ICD10 codes
- Degree of severity
- Daily dose/intake



Autoimmune + MS Insights – IQVIA 2022

A consumer health pharma client leveraged IQVIA's expertise on omnichannel and adopted 'phygital' engagement to increase brand touchpoints in the KSA

CASE STUDY

Omnichannel Orchestration

Objective

- Client wanted to take their first step towards an **orchestrated omnichannel** customer engagement in 2023 for KSA
- Their objective was to deliver **superior engagement to customers** by **enhancing reach** through digital touchpoints and new ways of **'phygital' engagement**

Our approach

- Our process involved creating a **content orchestration strategy** based on:
- **Client's research** of HCP preferences
- Setting up **email journeys with SFMC** and pairing it with recommended IQVIA capabilities of **HCP Space, Content Services, Executive Dashboard**
- **Program Management**

Impact so far

"In perspective of pure performance as a stand-alone measurement, we are doing amazingly well. The campaign numbers are great

– ***Email performance against region benchmarks***

- We were able to **successfully onboard ~4000 HCPs** onto the program using OneKey Consents
- We have been clocking **Email Open Rates** at **23% which is a great number** – average open rates for bulk emailers in the region is approximately 11% for Pharma campaigns for year long programs
- The program is in the initial stages of launch, and the client wants to **explore these metrics further** in future. Their vision is to **use HCP Space as a singular platform for HCP engagement** with webinars and knowledge enhancement **along side increased brand touchpoints with digital**

Agenda

- Newsletter report summary
- Regional summary and analysis
- **Appendix**

Scope of the report

<table>
<tr><td>Middle East & Africa</td><td colspan="2">KSA, UAE, Kuwait, Lebanon, Jordan, Egypt, Algeria, Morocco, Tunisia, Fr. West Africa, South Africa</td></tr>
<tr><td>Data coverage</td><td colspan="2">KSA: Private, Tender & LPO
UAE, Kuwait: Private & LPO
Egypt: Private, MoH & Semi-Governmental
Fr. West Africa, Jordan, Lebanon, Algeria, Morocco: Private
South Africa, Tunisia: Retail & State Hospital</td></tr>
<tr><td rowspan="2">Focus</td><td colspan="2">Time Period: MAT Q1 2022 to MAT Q1 2026[1]
Measures: Value (USD) and Volume (Units)
Analysis conducted at constant exchange rates and at ex-factory price level[2]</td></tr>
<tr><td>Exchange rates per 1 USD:
• Algeria: 130.49 DZD
• Egypt: 48.72 EGP
• Fr. West Africa: 0.85
• Jordan: 0.71 JOD
• Kuwait: 0.31 KWD</td><td>• Morocco: 9.22 MAD
• Saudi Arabia: 3.75 SAR
• South Africa: 16.34 ZAR
• Tunisia: 2.90 TND
• UAE: 3.67 AED
• Bahrain: 0.38 BD</td></tr>
<tr><td>Report release date</td><td colspan="2">July 2026</td></tr>
<tr><td>Analytical timeframe</td><td colspan="2">MAT Q1 2026</td></tr>
</table>

[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;
[3]Lebanon exchange rate is not available

Key terminologies used in the report

PPG	Previous Period Growth: Growth over last MAT i.e. MAT Q1 2025 vs. MAT Q1 2026 growth
CAGR	Compound Annual Growth Rate for period MAT Q1 2022 to MAT Q1 2026
MAT	Moving Annual Total: Period considering the last 12 months from the available period, values at MAT level are rolling yearly sum
Local/Reg companies	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
MNCs	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

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Thank You