

Middle East & Africa Pharmaceutical Business Insights

41st Edition

Report Release Date: October 2026

Analytical Timeframe: MAT Jun 2026



Disclaimer

IQVIA is not an “authorised person” for the purposes of the Financial Services and Markets Act 2000 (“FSMA”) and does not provide investment advice or carry on any other regulated activity under Part II of the FSMA 2000 (Regulated Activities) Order 2001

The forecasts, projections, and related information contained herein are made and provided subject to the assumptions, methodologies, caveats, and variables described in this report and are based on third party sources and data reasonably believed to be reliable. No warranty is made as to the completeness or accuracy of such third party sources or data

This report, in part or in whole, is not intended to constitute investment advice, and is not a recommendation to purchase or not purchase, an endorsement of, or an opinion as to the value of, any security or any investment instrument of any entity

As with any attempt to estimate future events, the forecasts, projections, conclusions, and other information included herein are subject to certain risks and uncertainties, and are not to be considered guarantees of any particular outcome

This report shall not be published, nor shall any public references to IQVIA be made regarding these services or this report, without IQVIA’ prior written approval. When so provided, this report and the information herein must always be provided and used in its entirety, including this complete Disclaimer page

This report is subject to the IQVIA General Terms and Conditions



Agenda

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

Business insights snapshot MAT Q2 2026: Many countries have witnessed high growth in 2026



- Overall, MEA Pharmaceutical Business has reached **\$43.3 B value** and **9.3 B Units**
- Value sales growth has been at **10.32% PPG¹ (Previous Period Growth)** and **12.27% CAGR²** while Volume sales has increased at **2.57% PPG** & at **1.81% CAGR²**



- Retail channel** dominates the region with **66.8% (\$28.91 B)** value sales share and **9.31% PPG** and volume share of **81.8% (7.61 B Units)** with **2.68% PPG**
- Growth of Hospital channel** has increased in terms of **PPG 12.41%** in value and **2.08% PPG** in volume



- MNCs** lead with **54.94%** share in total value sales with **8.44% PPG**
- Local** companies have grown at **12.71% PPG** in value and **4.28% PPG** in volume

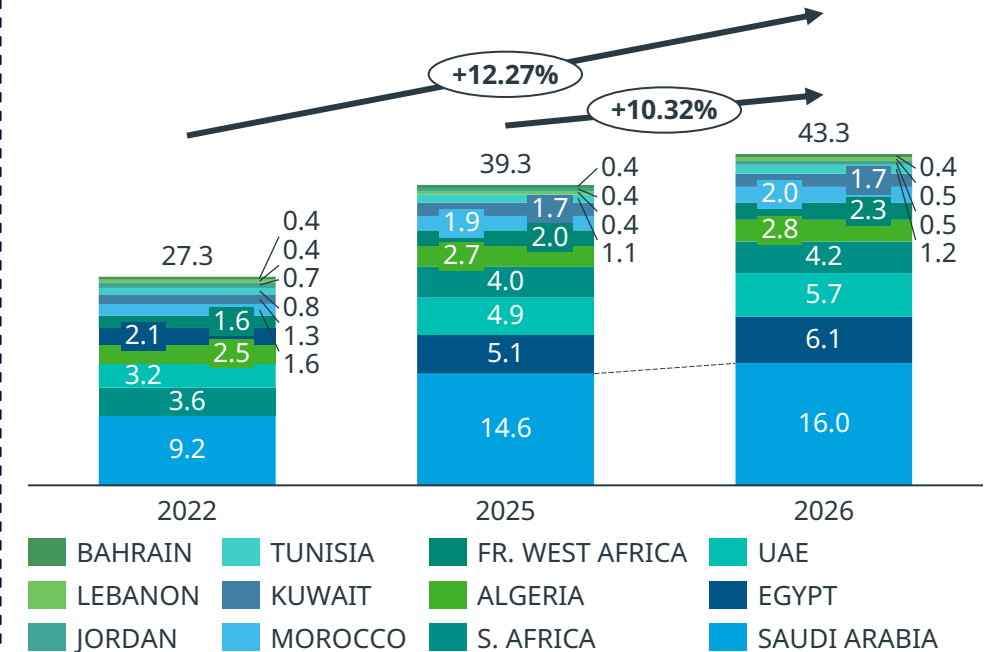


- Novartis, Sanofi** and **Eli Lilly** are the top MNC corporations in MEA contributing 22.3% to total MNC Sales
- Amongst the top 10 corporation, Eli Lilly** is the fastest growing corporation growing at **25% PPG**



- Alimentary Tract, Metabolism** is the top TA holding **20.9%** of value share with the highest contribution share from **KSA** at **35.6%**

MAT Q2



- Saudi Arabia leads the MEA region at **\$15.97 B** in value, expanded at **9.5% PPG** in value terms
- Egypt follows as the 2nd largest, with **\$6.07 B** in value has seen a growth of **19.77% PPG** and **29.7% CAGR²**

¹PPG: Previous Period Growth: MAT Q2 2025 vs. MAT Q2 2026 growth; ²CAGR: Compound Annual Growth Rate for the period MAT Q2 2022 to MAT Q2 2026;

Source: IQVIA Audited Data, MAT Q2 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

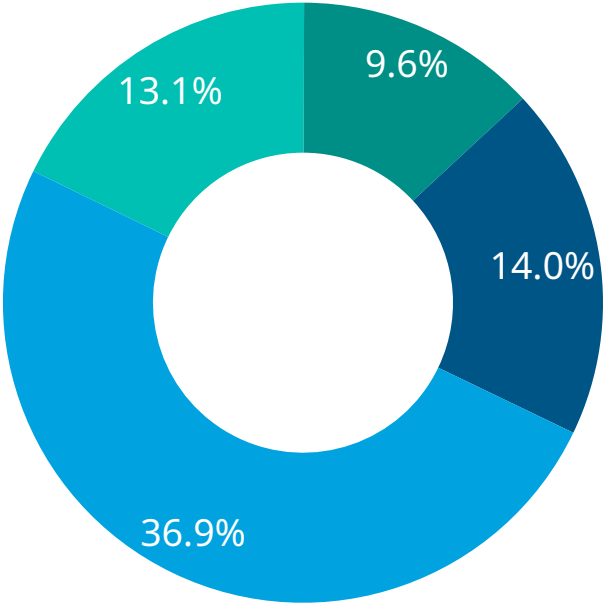
Among the key countries, KSA saw growth of 9.51% and continues to lead, accounting for 36.9% of sales in MEA Region

United Arab Emirates (UAE)

- UAE grew by 15.81% PPG accounting for \$5.69 B sales
- Top 10 TAs account for 48.3% of total sales, wherein Oncologics - Targeted is growing at 36.2% PPG
- Top 10 corporations account for 47.86% share in sales with Roche being the fastest growing at 43.9% PPG; mainly driven by top brands like Elevidys (178.6%), Ocrevus (31.1%), and Phesgo (21.3%) on PPG

Saudi Arabia (KSA)

- Saudi Arabia has grown by 9.51% PPG, with sales valued at \$15.97 B
- Hospital channel (Hospitals + LPO) grew by 11.2% PPG and accounting for 52% of total sales
- Top 10 corporations account for 43.43% share in sales. Hikma Pharma is leading with 7.35% share; Eli Lilly is fastest growing corporation at 20.7% PPG
- Hikma is driven by top brands like Amoclan (6.4%), Remsima (22.3%) and Omeral (45.3%) on PPG



South Africa¹

- South Africa has grown by 3.6% PPG accounting for \$4.16 B sales with the retail channel accounting for 86% of total sales
- Cough & Cold Preparations TA continues to be Top TA at with 6.2% share
- Top 10 corporations account for 49.57% share in sales. Adcock Ingram, a local firm, is leading with 3.61% PPG and Eli Lilly is the fastest growing at 170.1% PPG

Egypt (EGY)

- Egypt sales has increased by 19.77% PPG driven by growth from Retail channel (18.21% PPG) accounting for 69.5% of country's value sales
- Systemic Antibacterials is the top TA in Egypt with 8.1% value share while Newer Gen Type II Antidiabetes (54.0% PPG) is the fastest growing amongst the top 10 TAs (Exc. Non Therapeutics)
- Top 10 corporations account for 34.77% share in value sales, Roche is leading the sales with 6.28% share and is the fastest growing corporation among top 10 corps (38.38% PPG)

Source: IQVIA Audited Data, MAT Q2 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

Algeria business in MEA is growing at 4.42% PPG mainly driven by local/regional players with 8.11% PPG



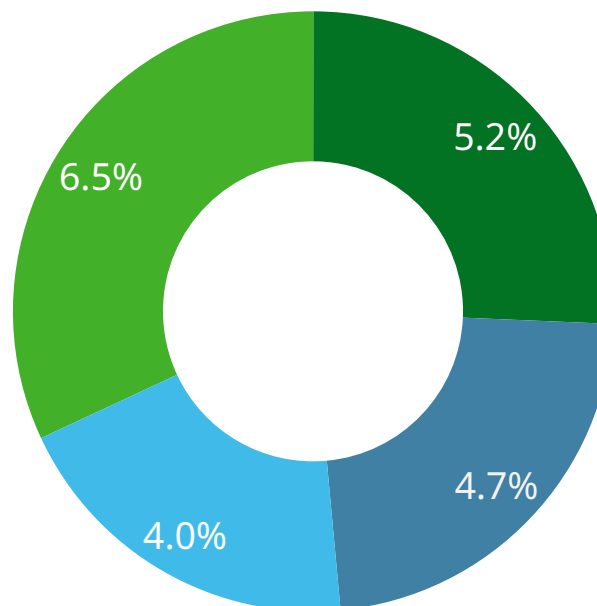
Algeria (ALG)

- Algeria retail channel sales increased by 4.42% PPG accounting for **\$2.83 B** sales in MAT Q2 2026
- Top TAs** are **Antihypertensives (11.6% PPG)** and **Insulin & Analogs (6.8% PPG)**. **Anti-Coagulants** is the 2nd fastest growing at **7.7% PPG** amongst the top 10 TAs (excl. Non-Therapeutics)
- MS Pharma** is the **top corporation** with **7.15% of sales share** and **Biocare Biotech SP** is fastest growing (67.17% PPG) among the **top 10** corporations
- Amongst the top products of **Biocare Biotech SP** like **Glarus (-12.5% PPG)**, **Biorapid (684.6% PPG)**, and **Normotrope (17.2% PPG)**



Morocco (MOR)

- Morocco retail channel has **increased by 6.65% CAGR and 7.66% PPG** accounting for **\$2.03 B** sales in MAT Q2 2026
- This increase in sales is mainly attributed to **MNCs** that have grown by **6.9% PPG** and **contribute 51.1%** to market sales. **local/Regional corps** have **grown by 8.46% PPG** while accounting for **48.9% of total sales**
- Amongst the top 10 corporations, **Bottu SA** continues to lead, with **5.37% share** in MAT Q2 2026. **Sothema** is the fastest growing amongst top 10 at **16.1% PPG**
- Amongst the top products of **Sothema**, **Novex (PPG 11.1%)**, **Zenetamet (PPG 100.4%)** and **Ofiken (PPG -1.1%)**; these are contributing to **30.7% of Sothema value sales** in MAT Q2 2026



Fr. West Africa (FWA)

- FWA retail channel has grown by 11.19% PPG accounting for **\$2.27 B** sales in MAT Q2 2026
- Local/Regional players** grew by **14.54% PPG** while accounting for **57.03% 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 **40.35% PPG** amongst the top 10 corporations.
- Generic Healthcare** growth is driven by top products like **Amloperin (34.3% PPG)**, **Genclav (66.5% PPG)** and **Ramithiazide (19.8% PPG)**



Kuwait (KWT)

- Kuwait sales decreased by -0.09% PPG** accounting for **\$1.73 B** sales driven by hospital channel with **75.8% Share**
- Top 10 corporations** account for **52.44%** share in sales with **Eli Lilly**, leading the business with **6.95% share** and decreased by **-6.53% PPG**. **Novartis (5.70% PPG)** is the 2nd and **Johnson & Johnson** at **PPG -3.25%** the 3rd largest share holding among top 10 corporations
- Eli Lilly** share is driven by products like **Mounjaro (35.1%)**, **Verzenio (-43.7%)** and **Cialis (-4.9%) PPG**. These Top 3 products contribute to **88.8%** of **Eli Lilly** Sales in MAT Q2 2026

Source: IQVIA Audited Data, MAT Q2 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 4.45% PPG in MEA region



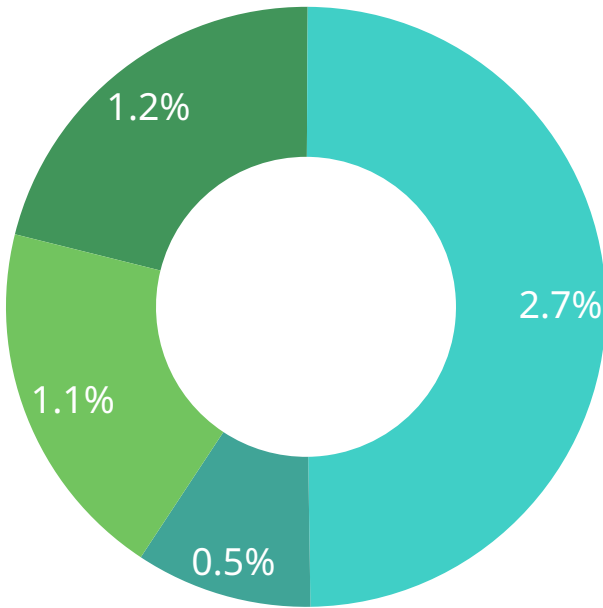
Lebanon (LEB)

- Lebanon retail channel sales increased by **22.57% PPG** at **0.5 B** value sales in **MAT Q2 2026**
- **Pharmaline IND** is leading the Lebanon, with **8.96% share** and **15.76% PPG** and **Eli Lilly** is the fastest growing corporation with **265.2% PPG** amongst the top 10 corporations
- **Top 3 products for Eli Lilly** contribute **95.4%** of the total value sales namely **Mounjaro (571.5%)**, **Cialis (27.1%)**, and **Forteo (36.3%) PPG**



Jordan (JOR)

- Jordan retail channel sales increased by **3.62% PPG** accounting for **\$0.46 B** in **MAT Q2 2026**
- Amongst the top 10 TAs, **Sex Hormones / Fertility** is the fastest growing TA with **31.8% PPG**
- **Hikma** is leading the business with **8.51% share**, sales has **increased by 5.09%** in MAT Q2 2026. **J.P.M.** has registered fastest growth of **24.5% PPG** among the top 10 corporations
- Top sales contributing products for **J.P.M.** includes **Galica (19.3% PPG)**, **Gabanet (27.2% PPG)** and **Doloraz (16.9% PPG)**



Tunisia (TUN)

- **Tunisia** has grown by **4.45% PPG** accounting for **1.17 B** sales in **MAT Q2 2026**;
- **Hospital & Retail** channel grew by **6.74%** and **3.55% PPG** respectively; **Retail channel** accounts for **71%** of total sales
- **Antihypertensive TA** lead the sales; accounting for **8.4%** share in sales
- **Medis** continues to be the leading corporation with **6.99% share**. **Roche (39% PPG)** and **Philadelphia PH. (17.5% PPG)** are the fastest growing corporations amongst the top 10 players
- **Fastest growing products for Roche** include **Perjeta (30.2%)**, **Ocrevus (33.5%)** and **Tecentriq (New Launch) PPG**



Bahrain (BHR)

- Bahrain sales increased by **26.36% PPG** accounting for **\$0.45 B** in **MAT Q2 2026**
- Amongst the top 10 TAs, **Lipid Regulators** is the largest TA with **8.4% share**
- **Novartis** is leading the business with **7.73%** share a sales has **increased by 12.32%** in MAT Q2 2026. **Lundbeck** has registered fastest growth of **1,882.7% PPG** among the top 10 corporations
- Top sales contributing products for **Lundbeck** includes **Cipralext (2,946.7% PPG)**, **Ebixa (2,395.3% PPG)** and **Abilify Maintena (147.8% PPG)**

Source: IQVIA Audited Data, MAT Q2 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

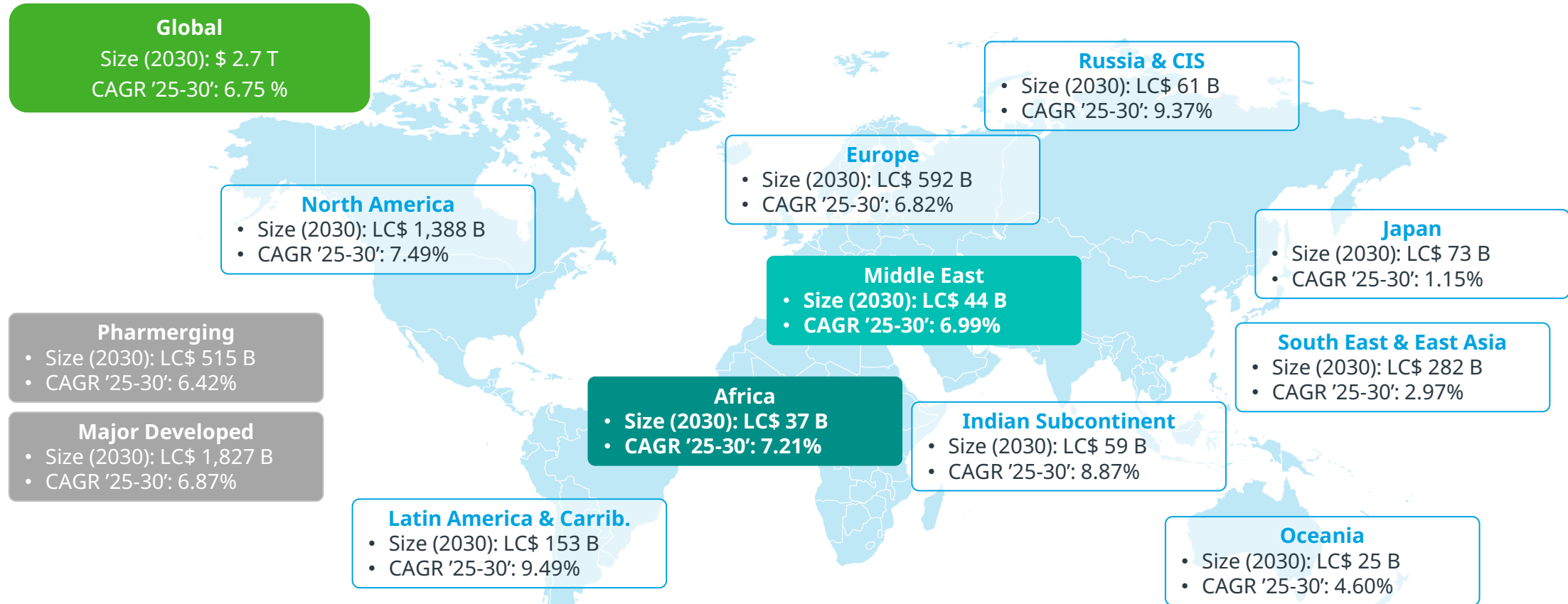


Agenda

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

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

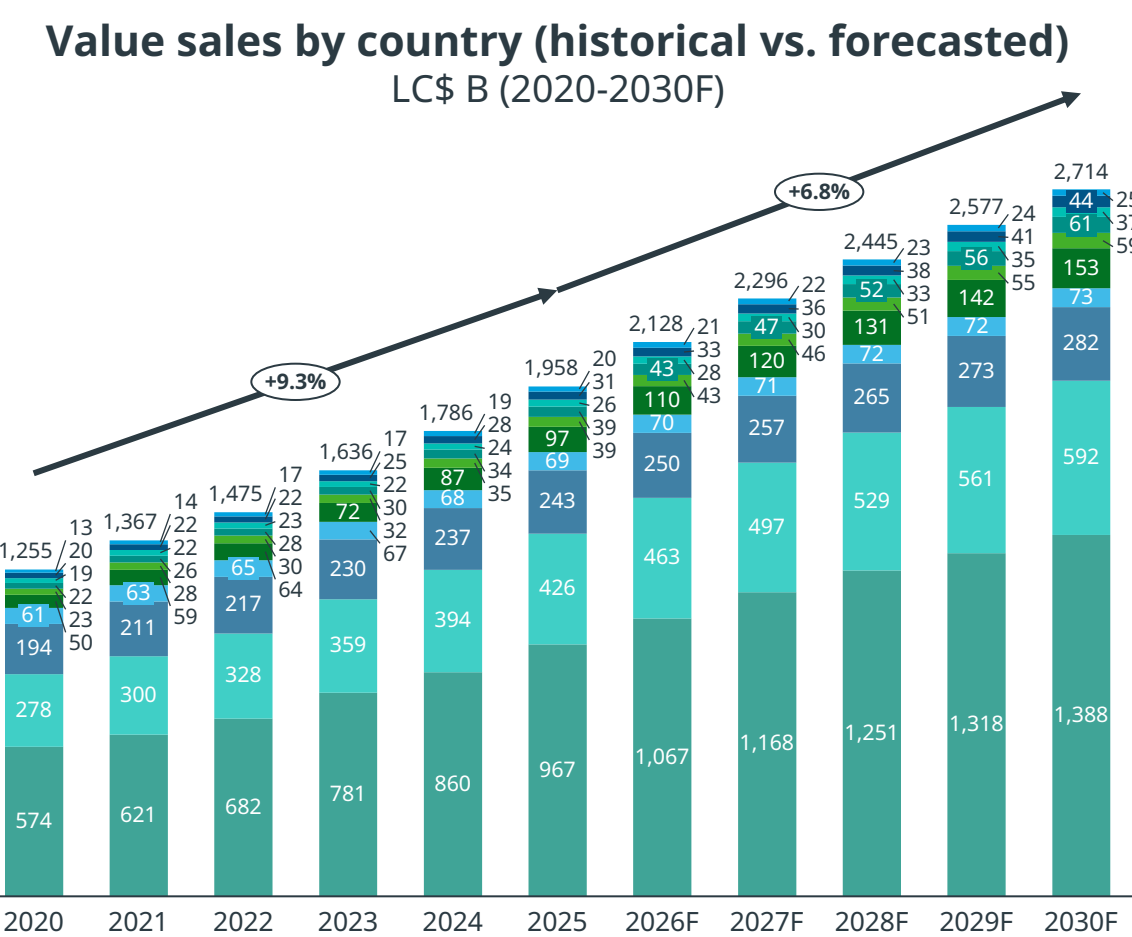
Highlights of IQVIA market prognosis 2026-2030 (May 2026)



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)

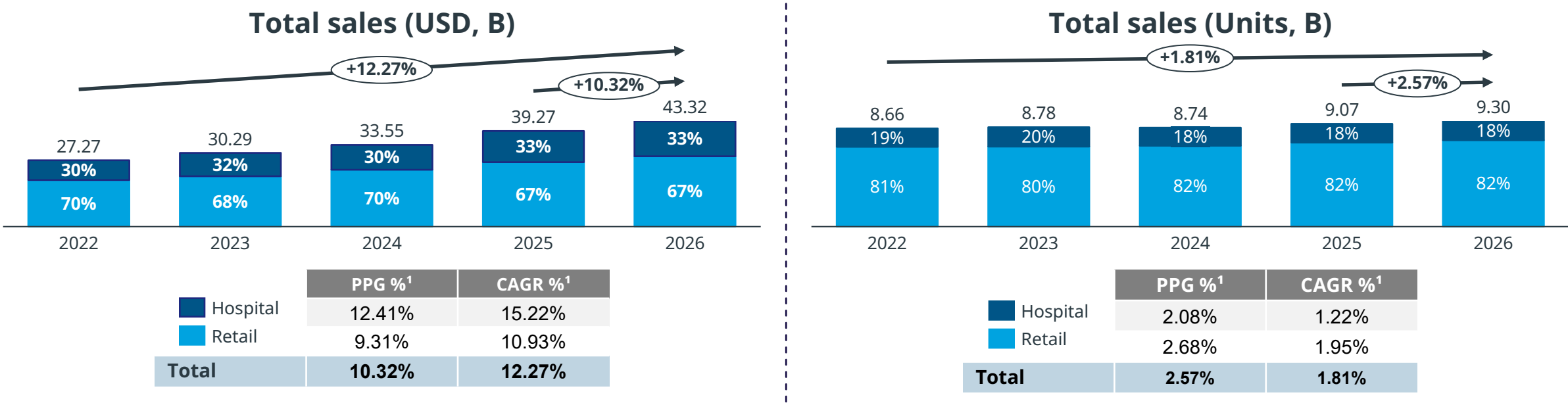


Growth summary (Historic vs. Forecasted)

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%

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

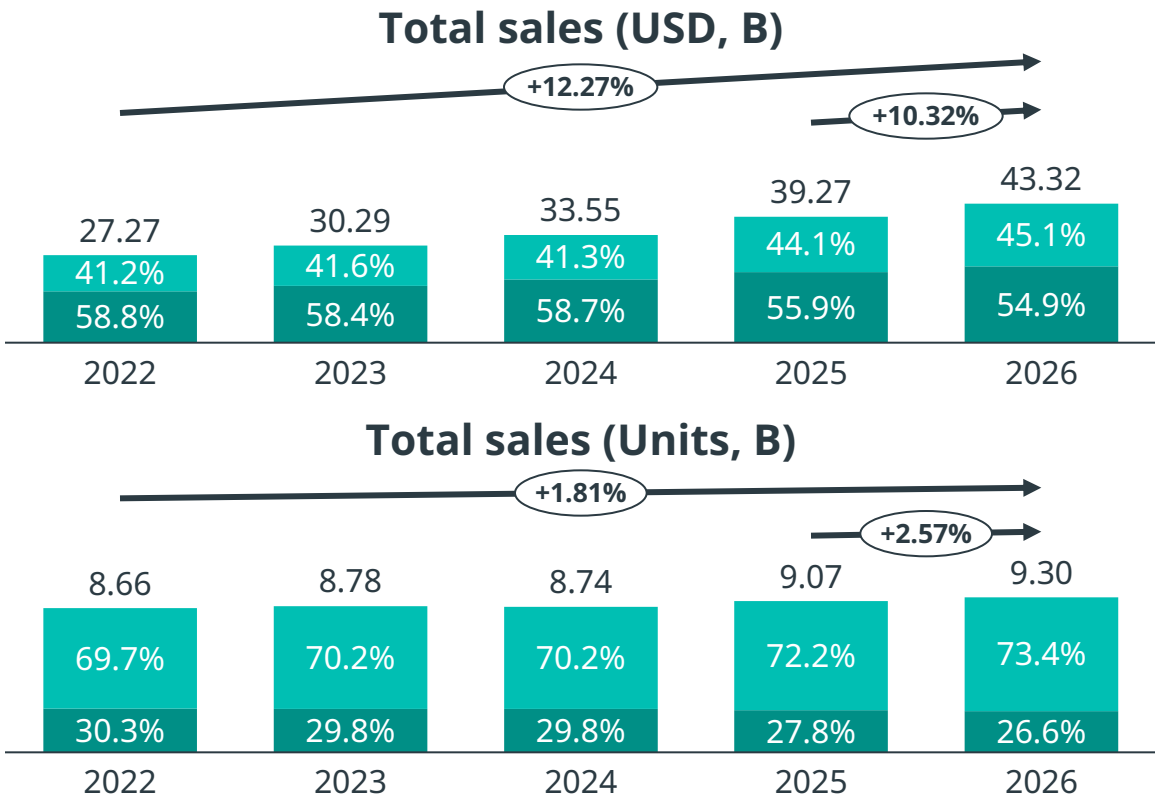
Both channels grew in their value growth in PPG with retail growing at 9.31% PPG contributing 66.8% of total value of MEA business



- Retail is the dominant channel in the region accounting for 66.8% value sales in the region
- Hospital channel continues to have a stable value growth in the region with large contributing countries like UAE (25.0% PPG), Egypt (23.5% PPG) and KSA (11.2% PPG)
- The growth of retail channel can be majorly attributed to expanding size of overall business in MEA

¹PPG (Previous Period Growth) calculated for MAT Q2 2025 vs. MAT Q2 2026 and CAGR (Compound Annual Growth Rate) is calculated for MAT Q2 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 Q2 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 \$3.51 B and contribute 17.97% of the total sales generated by Local/Regional players in MEA

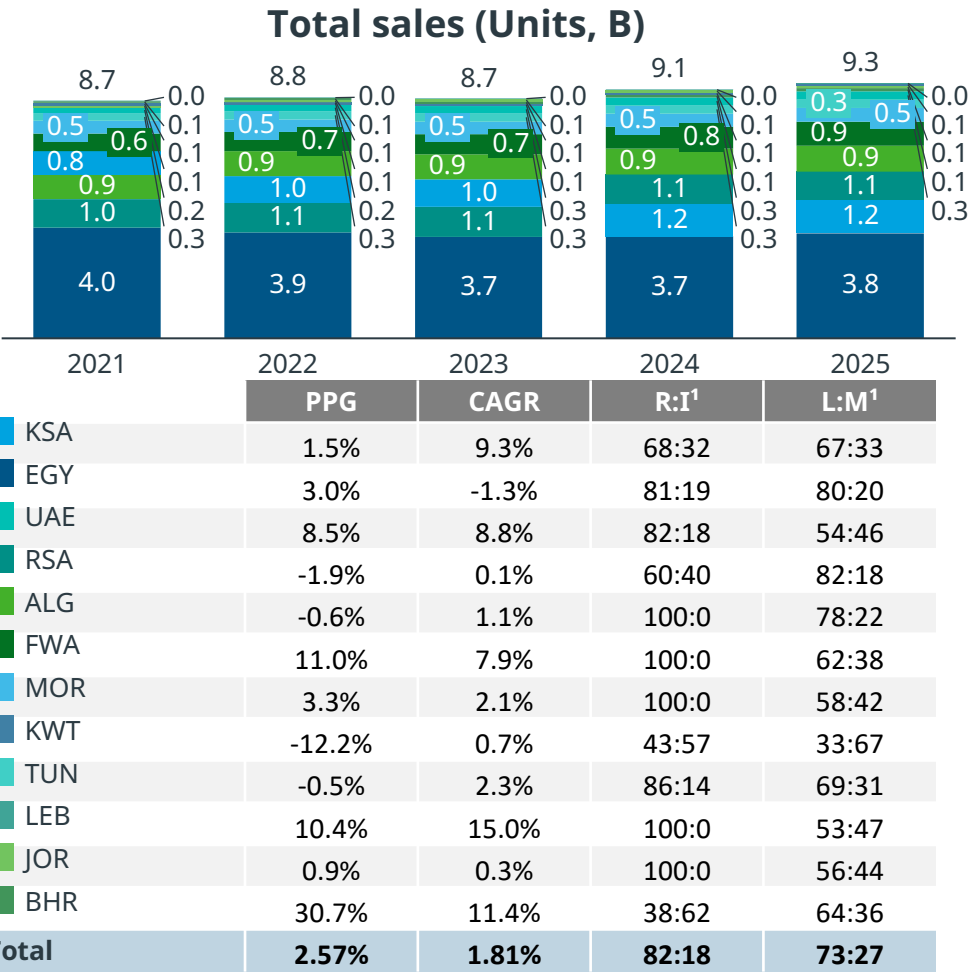
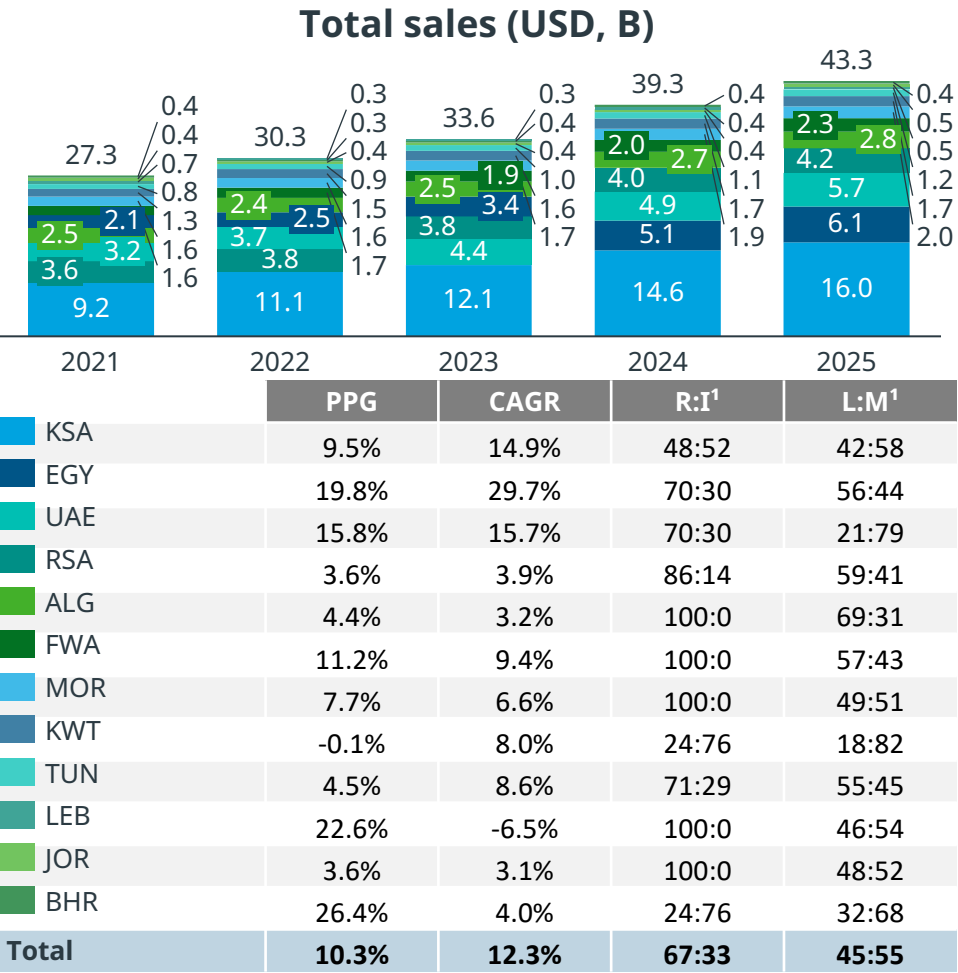
	PPG %	CAGR %
LOC/REG ¹	12.71%	14.83%
MNC ¹	8.44%	10.36%
Total	10.32%	12.27%

	PPG %	CAGR %
LOC/REG ¹	4.28%	3.13%
MNC ¹	-1.85%	-1.41%
Total	2.57%	1.81%

- Growth of **Local companies** in the region was mainly reflected in top contributors **KSA (13.9% PPG)**, **Egypt (19.3% PPG)** and **S. AFRICA (3.3% PPG)**
- Growth of **MNC companies** mainly reflected in top contributors like **KSA (6.6% PPG)**, **UAE (16.4% PPG)** and **Egypt (20.4% PPG)**

¹MNC: Multinational companies, Loc/Reg: Local and Regional companies
Source: IQVIA Audited Data, MAT Q2 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 Q2



- **KSA, Egypt & UAE** are among the top contributors in **MEA** region in terms of value share (**64% of total MEA region sales**)
- **In KSA Value growth (9.51% PPG)** Retail channel growth (7.7%) is low compared to hospital channel growth (11.2%)
- **Volume growth in KSA** is mainly driven by **Local players** with **4.1% PPG and 66.9% Volume share**

¹R: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 Q2 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

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 Q2 2026	R:I	L:M
13.1%	15.1%	1	A (ALIMENTARY TRACT,METABOL) 9.1	79:21	43:57
4.5%	8.2%	2	J (SYSTEMIC ANTI-INFECTIVES) 5.2	51:49	52:48
18.0%	19.0%	3	L (ANTINEOPLAST+IMMUNOMODUL) 4.7	28:72	16:84
10.8%	9.5%	4	N (NERVOUS SYSTEM) 4.1	69:31	55:45
10.6%	11.4%	5	C (CARDIOVASCULAR SYSTEM) 3.8	72:28	52:48
3.9%	9.6%	6	R (RESPIRATORY SYSTEM) 2.9	82:18	57:43
13.6%	12.6%	1 7	B (BLOOD + B.FORMING ORGANS) 2.4	48:52	42:58
7.9%	10.9%	-1 8	M (MUSCULO-SKELETAL SYSTEM) 2.3	78:22	52:48
11.1%	11.3%	1 9	G (G.U.SYSTEM & SEX HORMONS) 2.0	87:13	56:44
8.5%	12.1%	-1 10	D (DERMATOLOGICALS) 1.9	83:17	48:52

- Alimentary tract products continues to be the leading TA in MEA region accounting for 20.9% the region sales
- KSA accounts for 35.6% share in total Alimentary tract sales in MEA, while recording growth of 9.71% PPG in value
- Antineoplast + immunomodul has grown at 18% PPG, where 62.8% of total TA MEA sales contributed by KSA and UAE growing at a PPG of 15.59% & 28.52% respectively in this TA

¹R:I stands for Retail:Institution and L:M stands for Local:MNC; Institution includes LPO tender data where available
²Arrows indicate change in companies ranking in reference to its ranking in the previous year (MAT Q2 2025 vs. MAT Q2 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 Q2 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



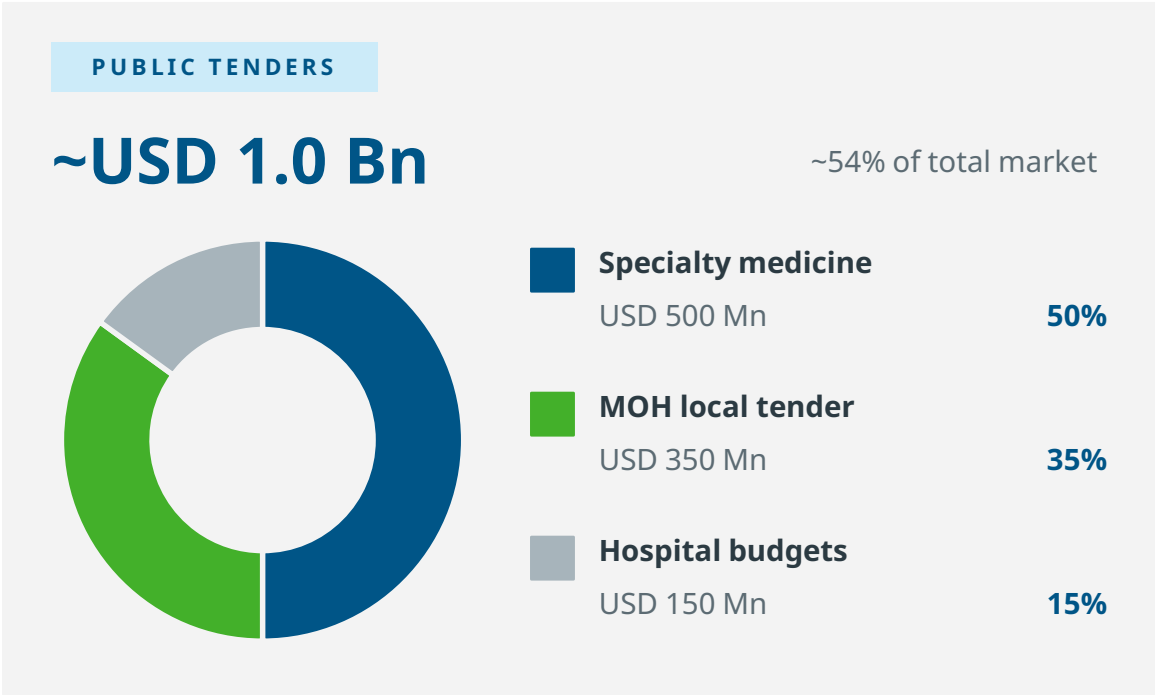
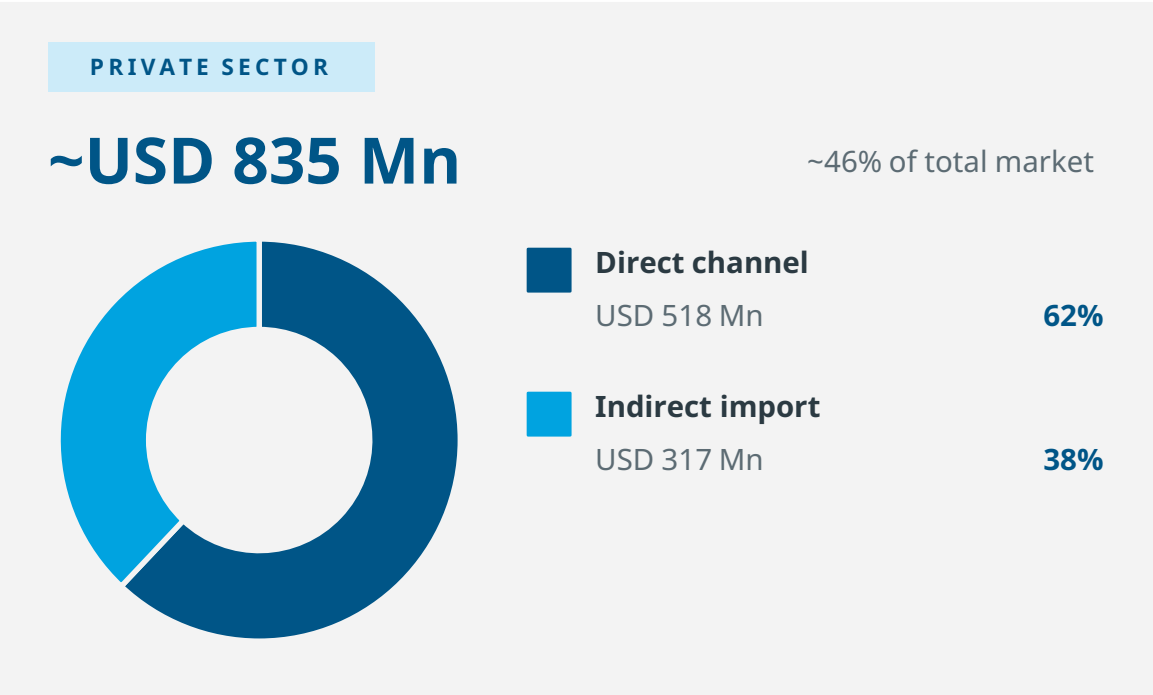
IQVIA launched Libya Pharmaceutical Index.

Data is covering Retail Pharmaceutical private Market. Back data is available from 2024.

Libya Pharmaceutical Market Structure – 2025 est. (Two sectors: private and public)

~USD 1.8 Bn

TOTAL MARKET 2025 · PRIVATE + PUBLIC · ESTIMATED



Private market, 2025 FY, at pharmacy purchase price level · Public tenders: at award price level · Exchange rate LD/USD 0.1666
Libya Pharmaceutical Index in collaboration with AMS Analytix

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

ESWT: Egypt switch tracker

Launch Jan-2024



Project scope

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

Methodology

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

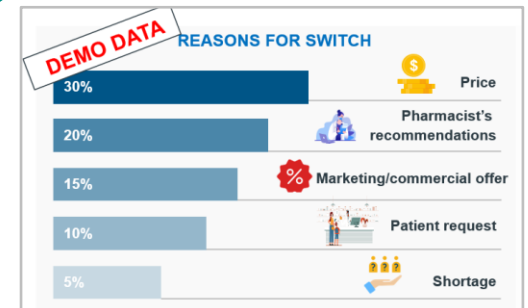


Deliverables/KPI

- 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

Sample/time frame

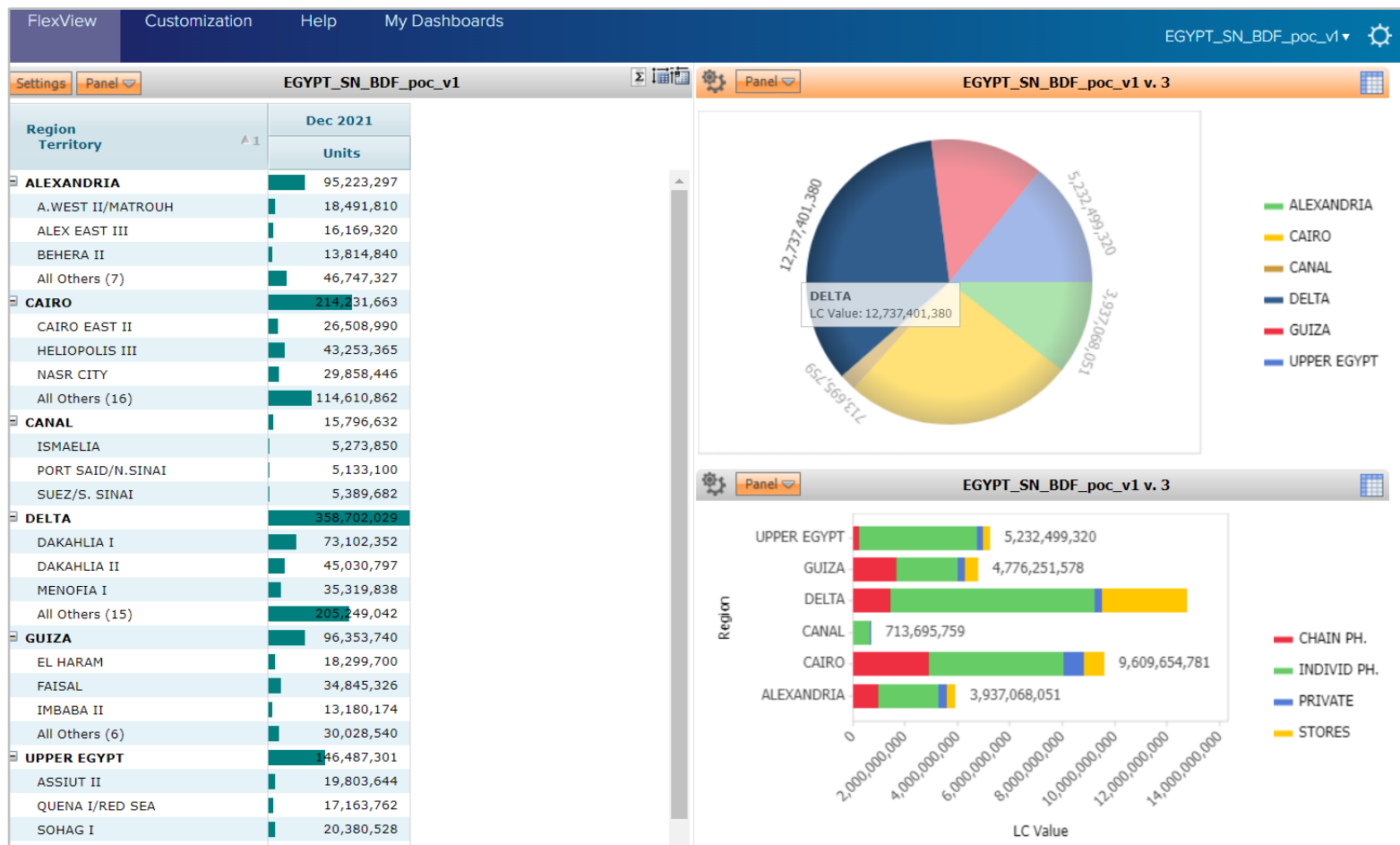
- Sample of 400 pharmacies (**Individual/street ph**) distributed through 4 regions (Cairo/Giza -Delta-Upper Egypt-Alexandria)
- Data collected in **2 waves/year**
- Reports will be published semester basis



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



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 spondyloarthritis, 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

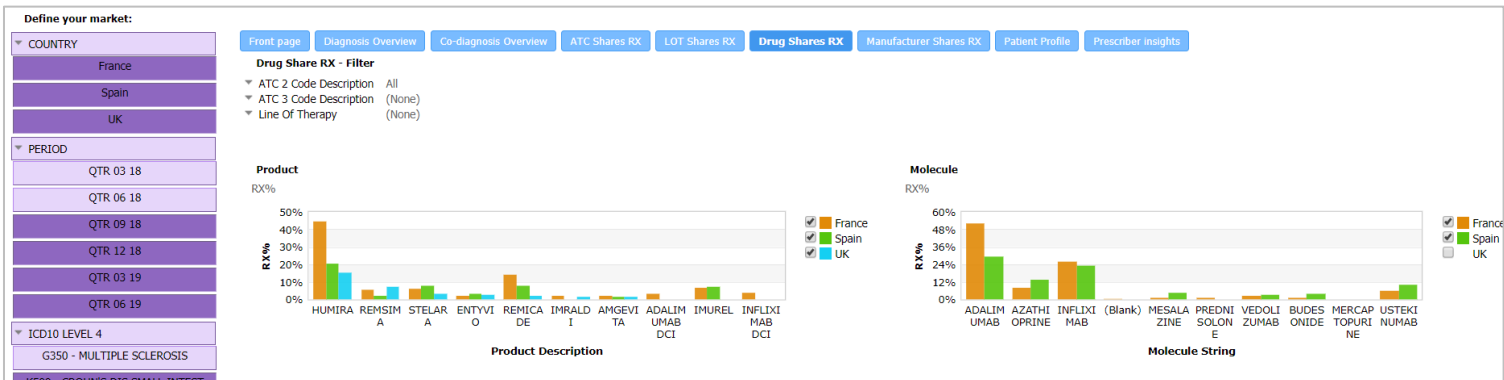
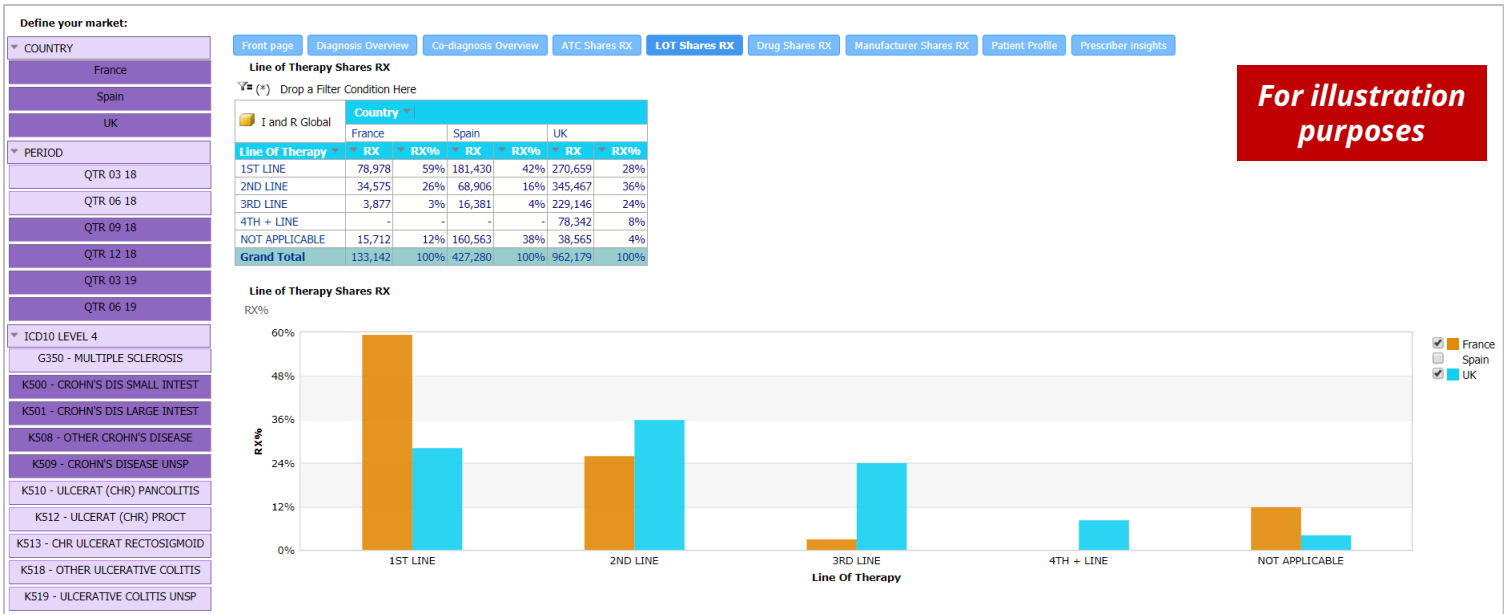
Diagnosis insights autoimmune – Get easy access to the best-in-class reports and visualizations with fully dynamic functionality

Entry 1: Diagnosis insights: entry by disease

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

Entry 2: Prescription/drug insights

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



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

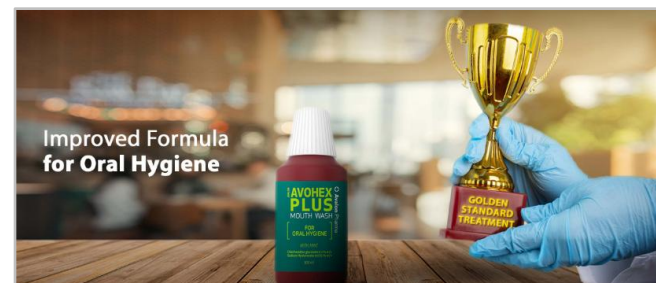
- Our process involved creating a **content orchestration strategy** based on:
- **Client's research** of HCP preferences
- Setting up **email journeys with SFMC** and pairing it with recommended IQVIA capabilities of **HCP Space, Content Services, Executive Dashboard**
- **Program Management**

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

Middle East & Africa	KSA, UAE, Kuwait, Lebanon, Jordan, Egypt, Algeria, Morocco, Tunisia, Fr. West Africa, South Africa	
Data coverage	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	
Focus	Time Period: MAT Q2 2022 to MAT Q2 2026 ¹ Measures: Value (USD) and Volume (Units) Analysis conducted at constant exchange rates and at ex-factory price level ²	
	Exchange rates per 1 USD: - Algeria: 132.78 DZD - Egypt: 52.16 EGP - Fr. West Africa: 0.86 - Jordan: 0.71 JOD - Kuwait: 0.31 KWD	- Morocco: 9.25 MAD - Saudi Arabia: 3.75 SAR - South Africa: 16.48 ZAR - Tunisia: 2.91 TND - UAE: 3.67 AED - Bahrain: 0.38 BD
Report release date	Oct 2026	
Analytical timeframe	MAT Q2 2026	

¹Time 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

²Converted from other price levels to ex-factory by using applicable discount factors;

³Lebanon exchange rate is not available

Key terminologies used in the report

PPG	Previous Period Growth: Growth over last MAT i.e. MAT Q2 2025 vs. MAT Q2 2026 growth
CAGR	Compound Annual Growth Rate for period MAT Q2 2022 to MAT Q2 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

Please contact us for more information



Eleonora Brero

*Senior Principal,
Consulting & Analytics
Middle East & Africa, IQVIA*

eleonora.brero@iqvia.com



Yasser El Assy

*Director Info,
Client Services
Middle East, IQVIA*

yasser.el-assy@iqvia.com



Siva Sankar Chandolu

*Engagement Manager,
Consulting & Analytics
Middle East & Africa, IQVIA*

siva.sankarchandolu@iqvia.com

Thank You

