



Middle East & Africa Pharmaceutical Business Insights

Thirty-Third Edition

Report Release Date: Sep 2024

Analytical Timeframe: MAT Jun 2024

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Agenda

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

Business insights snapshot MAT Q2 2024: Many countries have witnessed high growth in 2024



- Overall, MEA Pharmaceutical Business has reached **\$32.2 B value** and **8.6 B Units**
- Value sales growth has been at **10.2% PPG¹ (Previous Period Growth)** and **8.7% CAGR²** while Volume sales has declined at **-0.8% PPG** & increased at **1.4% CAGR²**



- Retail channel** dominates the MEA market with **69.1% (\$22.2 B)** share in value sales with **12.2 % PPG** and **81.4% (7.0 B Units)** share in volume with **0.7% PPG**
- Growth of Hospital channel** has increased in terms of **PPG (6.0%)** in value and decreased by **-6.7% PPG** in volume



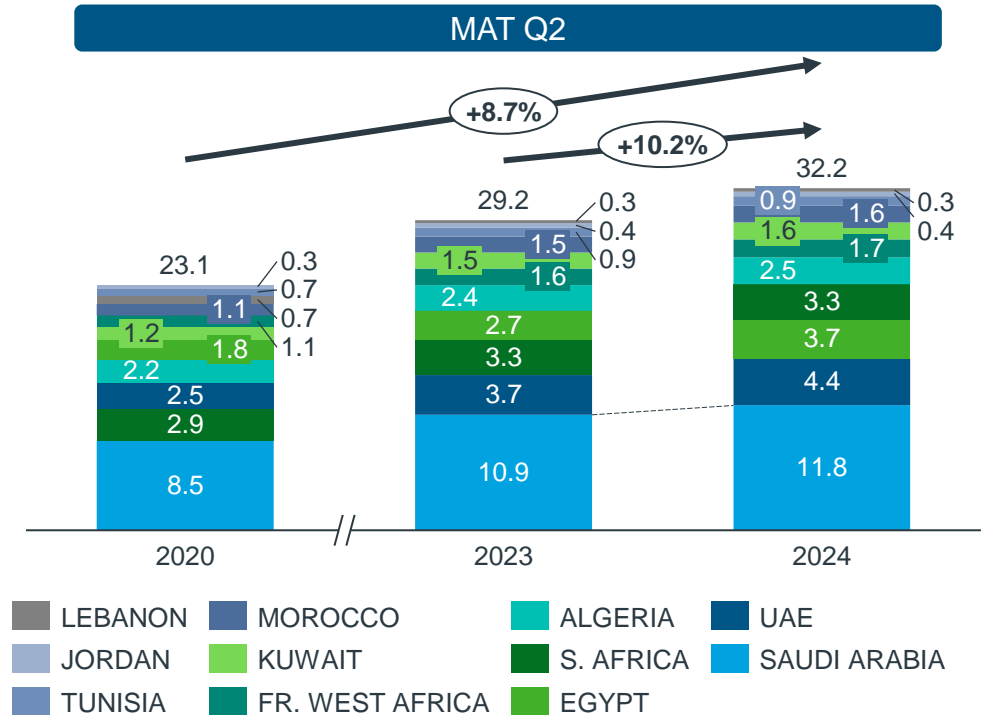
- MNCs** lead with **59.7%** share in total value sales with **11% PPG**
- Local** companies have grown at **9.1% PPG** in value and **-1.4% PPG** in volume



- Sanofi, Novartis** and **GSK** continue to be the top corporations in MEA
- Amongst the top 10 corporation, Eli Lilly** is the fastest growing corporation growing at **97.8% PPG**



- Alimentary Tract, Metabolism** is the top TA holding **20%** of value share with the highest market contribution in **KSA (36.8%)**



- Saudi Arabia, the largest market in MEA at **\$11.8B** in value, expanded at **8.1% PPG** in value terms
- UAE is the 2nd largest market with **\$4.3 B** in value has seen a growth of **18.2% PPG** and **15.1% CAGR²**

1. PPG: Previous Period Growth: MAT Q2 2024 vs. MAT Q2 2023 growth

2. CAGR: Compound Annual Growth Rate for the period MAT Q2 2020 to MAT Q2 2024;

Source: IQVIA Audited Data, MAT Q2 2024, 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

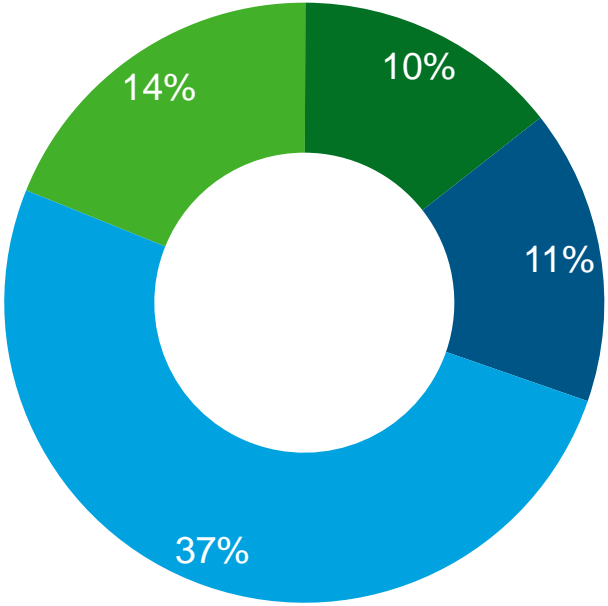
Among the key countries, KSA saw growth of ~8.1% and continues to be the largest market accounting for 36.6% of sales in MEA

United Arab Emirates (UAE)

- UAE grew by 18.2% PPG (2nd fastest growing country in MEA region) accounting for \$4.4 B sales
- Top 10 TAs account for 50.3% of total sales, wherein Newer Gen Type II Antidiabetics TA is growing at 67.7% PPG
- Top 10 corporations account for 49.7% share in sales with Eli Lilly being the fastest growing at 98.2% PPG; mainly driven by top brands like Mounjaro (193.4%), Cialis (8.3%), and Taltz (40.7%) on PPG

Saudi Arabia (KSA)

- KSA market has grown by 8.1% PPG (3rd fastest growing country in MEA region) accounting for \$11.7 B sales
- Hospital channel grew by 0.7% PPG and accounting for 48% of total market sales
- Top 10 corporations account for 45.9% share in sales. Sanofi is leading the market with 6.1% share and 9% PPG
- Jamjoom Pharma (22.3% PPG) is the fastest growing Local/Reg mainly driven by top brands like Azi-Once (60.5%), Vitamin D3 (30.1%), Aciloc (30.8%) and Relaxon (45.4%) on PPG



South Africa¹

- South Africa has grown by 0.4% PPG accounting for \$3.3 B sales with the retail channel accounting for 81.9% of total sales
- Cough & Cold Preparations TA continues to be Top TA at -2.2% PPG and 6.4% share
- Top 10 corporations account for 52.1% share in sales. Adcock Ingram, a local firm, is leading the market with 9.5% share and Novo Nordisk being the fastest growing at 8.9% PPG

Egypt (EGY)*

- Egypt has declined by -4.2% PPG driven by growth from Retail channel (-0.3% PPG) accounting for 80.6% of country's sales
- Systemic Antibacterials is the top TA in Egypt with 10.7% share while Anti-Ulcerants Products (3.4% PPG) is the fastest growing amongst the top 10 TAs
- Top 10 corporations account for 44% share in volume sales, Pharco is leading the market with 7.6% share and Sanofi is the fastest growing corporation (23.3% PPG)

Source: IQVIA Audited Data, MAT Q2 2024, 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 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 2019-2020

*in Egypt market, we updated the insights based on sales units; **Egypt market grew by 34.5% PPG in terms of sale value**

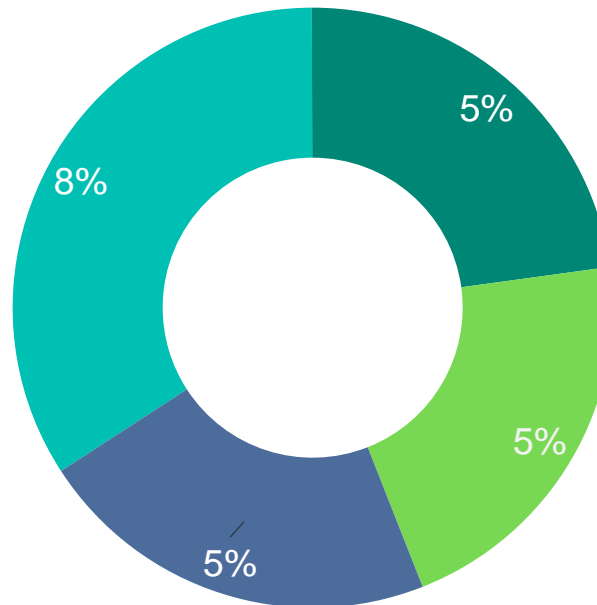
FWA business in MEA is growing at 6.4% PPG mainly driven by local/regional players with 11.3% PPG

Algeria (ALG)

- Algeria retail channel sales increased by 4.7% PPG accounting for \$2.5 B sales in MAT Q2 2024 period
- Top TAs for Algeria include Antihypertensives and Insulin & Analogs. Lipid Regulators is the fastest growing TA at 12.8% PPG amongst the top 10 TAs
- Sanofi is the top corporation in Algeria with 8.3% of market share, however Beker is the fastest growing company amongst the top 10 at 17% PPG
- Amongst the top products of Beker like Trombix (37.6% PPG), Pregabalin (12.5% PPG), and Olanza (5.7% PPG)

Morocco (MOR)

- Morocco retail channel has increased by 8.6% CAGR and 4.4% PPG accounting for \$1.6 B sales in MAT Q2 2024
- This increase in Moroccan market is mainly attributed to Local corps that have grown by 8.2%. MNCs that have grown by 1.3% PPG while accounting for 52.7% of total sales
- Amongst the top 10 corporations, Bottu SA continues to lead Moroccan market with 6.0% share in MAT Q2 2024. Laprophan is the fastest growing amongst top 10 at 18% PPG
- Amongst the top products of Laprophan, Ixor (PPG 29.4%), Neofortan (PPG 38.2%) and Floxam (PPG 20%) contributing to 24% value sales in MAT Q2 2024



Fr. West Africa (FWA)

- FWA retail channel has grown by 6.4% PPG accounting for \$1.7 B sales in MAT Q2 2024
- Local/Regional players grew by 11.3% PPG while accounting for 49% of total sales
- Amongst the top 10 corporations, Sanofi continues to be the top selling corporation with 6.6% share while Pharma 5 is the fastest growing top corporation at 18.5% PPG amongst the top 10 corporations.
- Pharma 5 growth is driven by top products like Aclav (19.9% PPG), Astaph (29.9% PPG) and Nuravit (8.9% PPG)

Kuwait (KWT)

- Kuwait sales increased by 6.7% PPG accounting for \$1.6 B sales driven by LPO channel with 74.9% contribution of total sales
- Top 10 corporations account for 54.3% share in sales with Novartis leading the business with 7% share and increased by 26.3% PPG and it is the 3rd fastest growing among top 10 corporations after Eli Lilly (47.8% PPG) and MSD (32%)
- Novartis growth is driven by high growth products like Cosentyx (25.1%), Xolair (266.0%) and Entresto (41.5%) PPG

Source: IQVIA Audited Data, MAT Q2 2024, 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

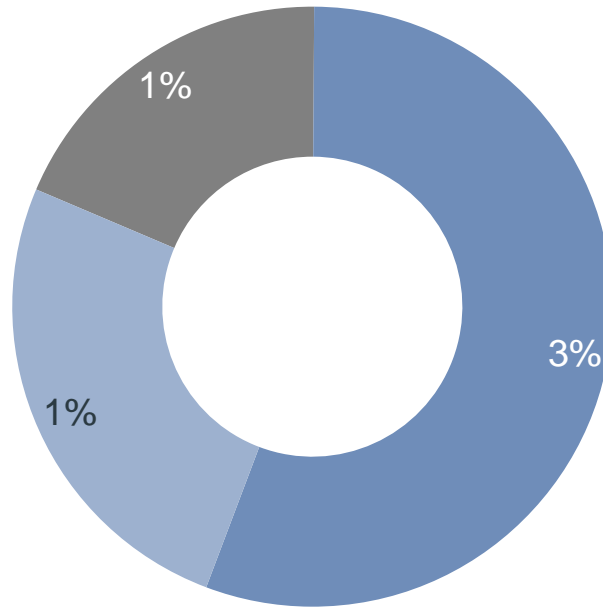
Tunisia is growing at 7.6% PPG in MEA region

Lebanon (LEB)*

- Lebanon retail channel unit sales increased by **24.3% PPG** reaching **85.2 M** unit sales in **MAT Q2 2024**
- GSK** is leading the Lebanon market with **10.9% share and 32.4% PPG** and **Julphar** is the fastest growing corporation with **98.1% PPG** amongst the top 10 corporations
- Top 10 products for Julphar contribute 75.4% of the total Units sales amongst which Adol (110.1%), Albenda (160.6%), and Profinal XP (134.3%) PPG** are fast growing and high contributing products

Jordan (JOR)

- Jordan retail channel sales increased by **2.6% PPG** accounting for **\$0.4 B** in **MAT Q2 2024**
- Amongst the top 10 TAs, **Newer Gen Type II Antidiabetes** is the fastest growing TA with **31.6% PPG**
- Although **Hikma** is leading the business with **8.8% share**, its sales has **increased by 1.8%** in MAT Q2 2024. **Novo Nordisk** has registered fastest growth of **37.9% PPG** among the top 10 corporations
- Fastest growing products for **Novo Nordisk** includes **Ozempic (185.2% PPG)**, **Saxenda (-56.6% PPG)** and **Norditropin (14.4% PPG)**



Tunisia (TUN)

- Tunisia** has grown by **7.6% PPG** accounting for **\$0.9 B** sales in **MAT Q2 2024**;
- Retail & Hospital** channel grew by **7.2% and 8.6% PPG** respectively; **Retail channel** accounts for **71.5%** of total sales
- Antihypertensive & Systemic Antibacterial** TAs lead the market; both together accounting for **16.8%** share in sales
- Medis** continues to be the leading corporation with **6.7% share**. **Unimed Tunis (77% PPG)** and **Galpharma (19% PPG)** are the fastest growing corporations amongst the top 10 players
- Fastest growing products for Unimed Tunis include Enoxamed (324.2%), Lenticlean (22.4%) and Sod Chloride Unib (261.4%) PPG**

Source: IQVIA Audited Data, MAT Q2 2024, 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 market, we updated the insights based on sales units

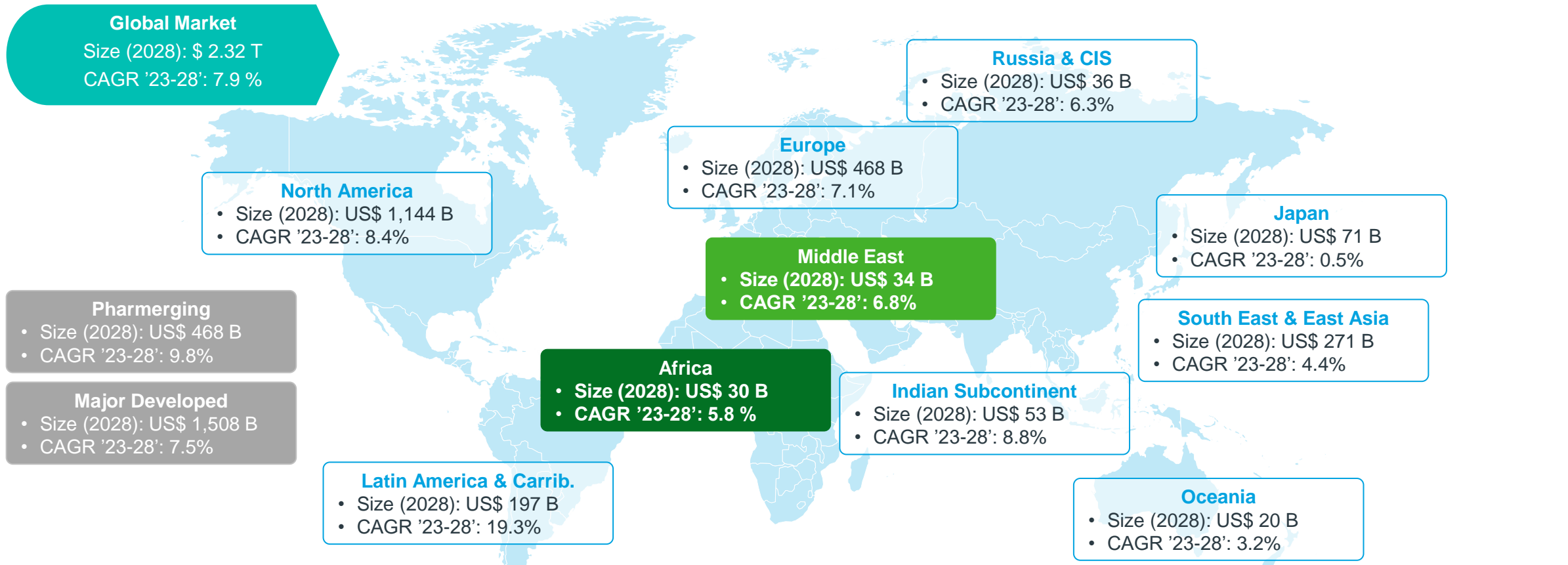


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By 2028, Global pharma business is expected to reach US\$ 2.32 T; Middle East & Africa pharma business collectively to be US\$ 64.1 B

Highlights of IQVIA Market Prognosis 2024-2028 (May 2024)

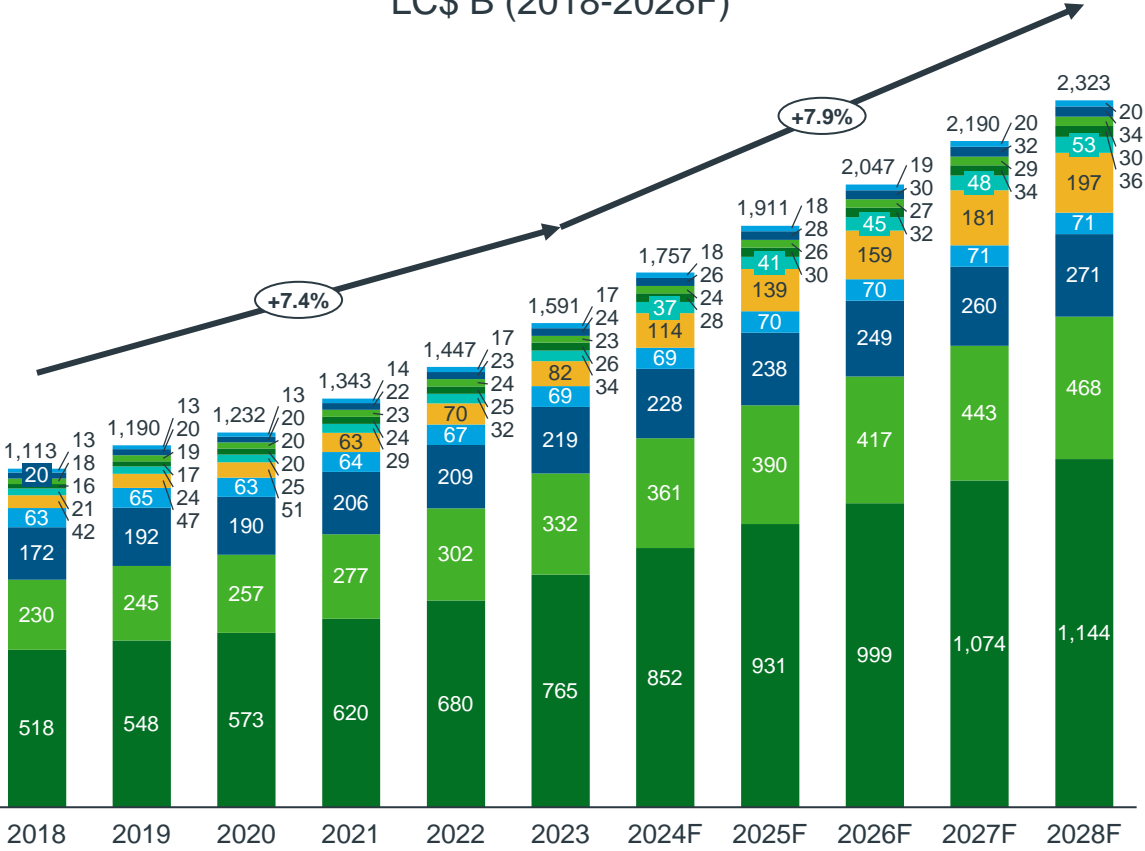


Note – Size indicates 2028 Sales in LC \$

Source: IQVIA Market Prognosis 2024-2028 (May 2024); 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 ~USD 51 B in 2024 and is collectively growing at 4.6% (2018 through 2023)

Value Sales by Country (Historical vs. Forecasted)
LC\$ B (2018-2028F)



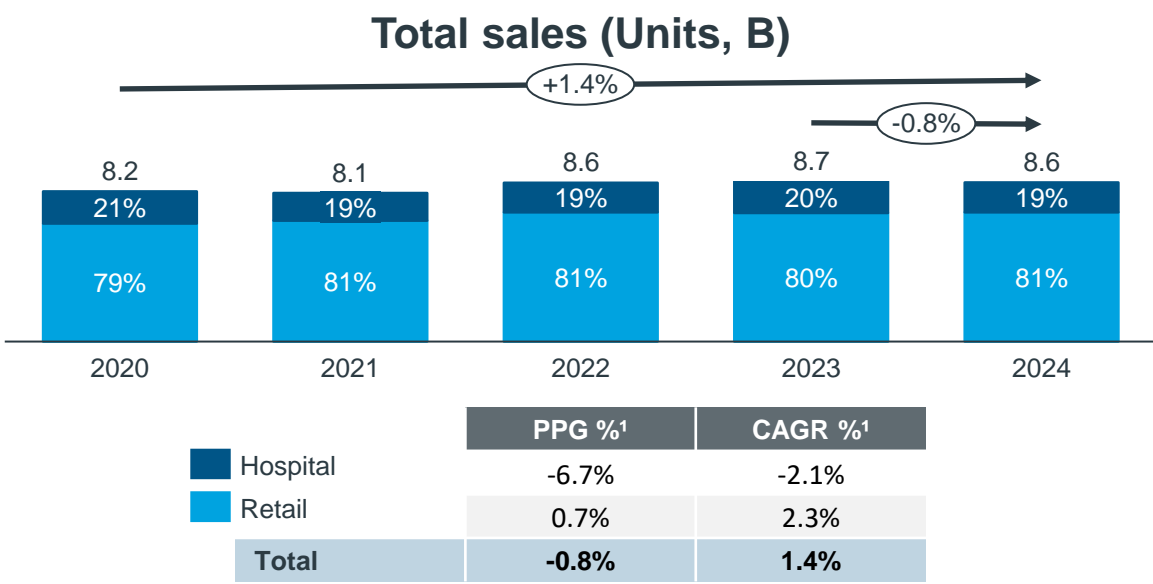
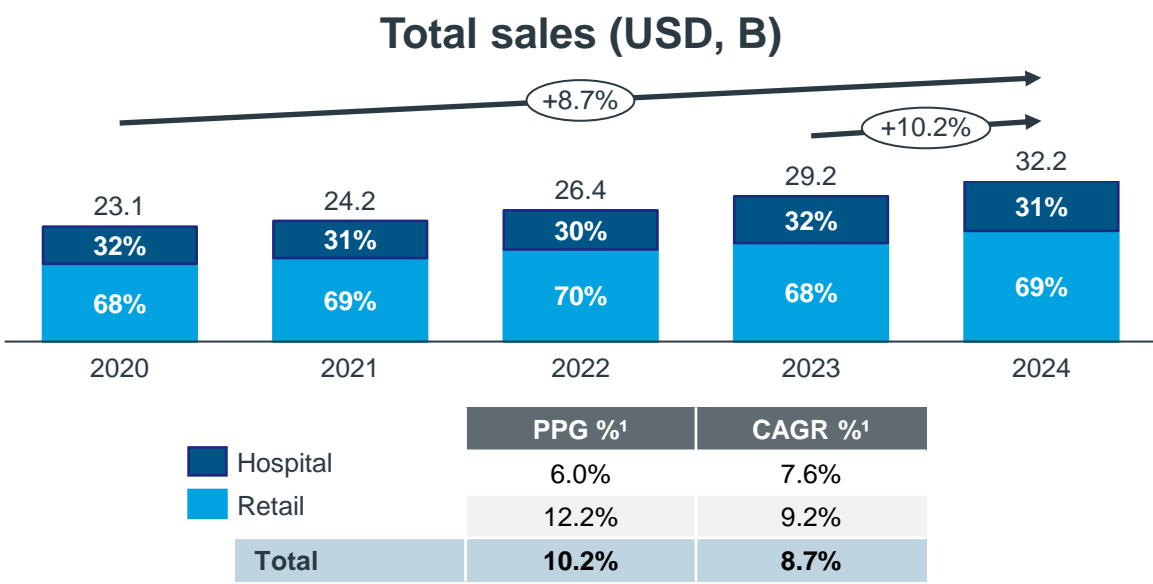
Growth summary (Historic vs. Forecasted)

Regions	CAGR '18-'23	CAGR '23-'28
Oceania	6.5%	3.2%
Middle East	4.1%	6.8%
Africa	5.2%	5.8%
CIS	11.0%	6.3%
Indian Sub-Continent	10.1%	8.8%
Latin America, including the Caribbean	14.0%	19.8%
Japan	1.7%	0.5%
South-East & East Asia	4.9%	4.4%
Europe	7.6%	7.1%
North America	8.1%	8.4%
Global Pharma Business	7.4%	7.9%

Growth>=Global Growth<Global

Source: IQVIA Market Prognosis 2024-2028 (May 2024) 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 the fastest at ~12.2% PPG contributing 69.1% of total value of MEA business

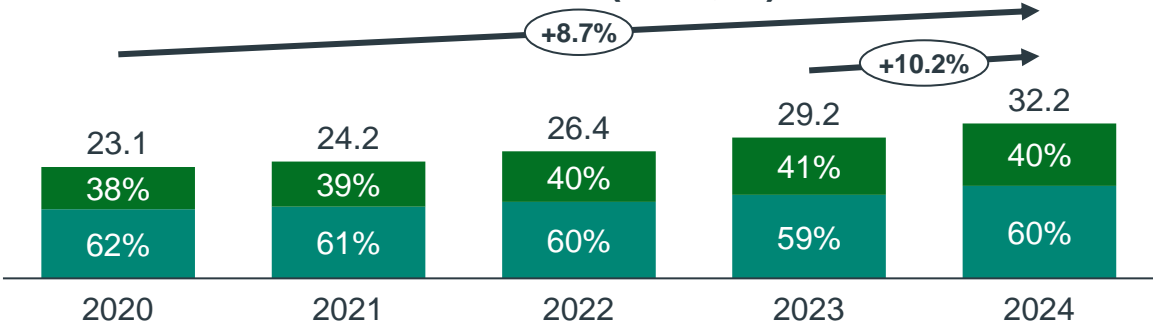


- Retail is the dominant channel in the region accounting for 69.1% value sales in the region
- Hospital channel continues to have a stable value growth in the region with UAE, Kuwait & KSA growing by 21.3%, 5,8% & 0.7% PPG respectively
- The growth of retail channel can be majorly attributed to expanding size of overall business in MEA

1. PPG (Previous Period Growth) calculated for MAT Q2 2024 vs. MAT Q2 2023 and CAGR (Compound Annual Growth Rate) is calculated for MAT Q2 2020-2024
 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
 Source: IQVIA Audited Data, MAT Q2 2024, 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

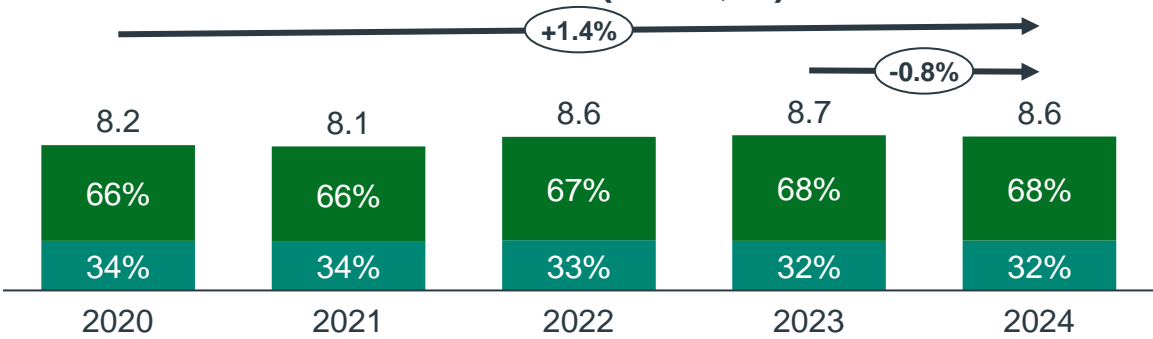
Total sales (USD, B)



Hikma, Tabuk & Spimaco are among the largest Local/Regional companies in Collectively they generate value sales of \$2.3 B and contribute 17.9% of the total sales generated by Local/Regional players in MEA

	PPG %	CAGR %
LOC/REG ¹	9.1%	10.5%
MNC ¹	11.0%	7.5%
Total	10.2%	8.7%

Total sales (Units, B)

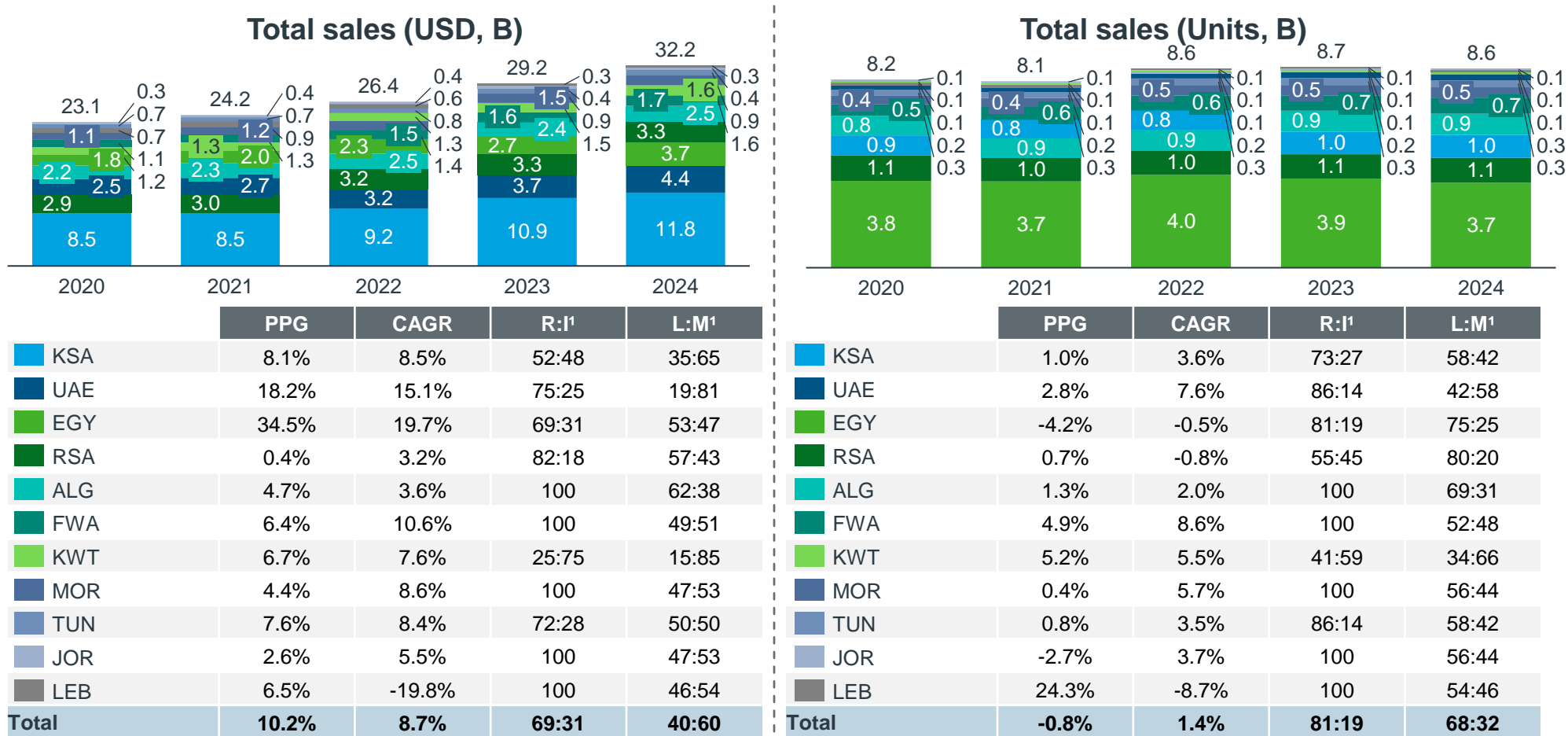


	PPG %	CAGR %
LOC/REG ¹	-1.4%	2.1%
MNC ¹	0.5%	0.1%
Total	-0.8%	1.4%

- Growth of **Local companies** in the region was mainly reflected in **Egypt (29.9%), UAE (15.8%) and Tunisia (12.2%) PPG**
- Growth of **MNC companies** mainly reflected in **Egypt (39.9%) ,UAE (18.8%) and Saudi Arabia (10.6%) PPG**

1. MNC: Multinational companies, Loc/Reg: Local and Regional companies
 Source: IQVIA Audited Data, MAT Q2 2024, 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 sales in MAT Q2



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 Q2 2024, 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

- **KSA, UAE, and Tunisia** are among the fastest growing in MEA region in terms of values sales
- **Value growth in UAE (18.2% PPG)** Hospital channel growth (21.3%) is high compared to retail channel growth (17.2%)
- **Volume growth in UAE** is mainly driven by **Local players** with 7.2%

Alimentary tract treatment products is the largest & fastest growing TA; Antineoplastic + immunomodulators is 2nd fastest growing TA among top TAs

Top selling Therapy Areas (ATC1s)

PPG%	CAGR%	Ranking change	Sales (USD, B) MAT Q2 2024	R:I	L:M
17%	11%	↔ ①	A (ALIMENTARY TRACT,METABOL) 6.4	78:22	35:65
3%	6%	↔ ②	J (SYSTEMIC ANTI-INFECTIVES) 4.2	55:45	49:51
5%	8%	↔ ③	N (NERVOUS SYSTEM) 3.3	71:29	45:55
17%	14%	↔ ④	L (ANTINEOPLAST+IMMUNOMODUL) 3.2	27:73	15:85
6%	6%	↔ ⑤	C (CARDIOVASCULAR SYSTEM) 2.8	74:26	46:54
6%	8%	↔ ⑥	R (RESPIRATORY SYSTEM) 2.4	85:15	51:49
13%	8%	↔ ⑦	B (BLOOD + B.FORMING ORGANS) 1.7	52:48	38:62
9%	8%	↔ ⑧	M (MUSCULO-SKELETAL SYSTEM) 1.5	84:16	56:44
14%	8%	↑ ⑨	G (G.U.SYSTEM & SEX HORMONS) 1.5	89:11	51:49
9%	10%	↓ ⑩	D (DERMATOLOGICALS) 1.5	86:14	43:57

- Alimentary tract products continues to be the leading TA in MEA region accounting for 20% the region sales
- KSA accounts for 37% share in total Alimentary tract sales in MEA, while recording growth of 20.9% PPG in value
- Antineoplastic + immunomodulators has grown at 17.2% PPG, where 64.2% of total TA MEA sales contributed by KSA and UAE growing at a PPG of 9.6% & 30.6% respectively in this TA

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 Q2 2023 vs. MAT Q2 2024)
 Analysis based on Algeria, Egypt, Fr. West Africa, Jordan, Kuwait, Lebanon, Morocco, Saudi Arabia, South Africa, Tunisia, UAE
 Source: IQVIA Audited Data, MAT Q2 2024, 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

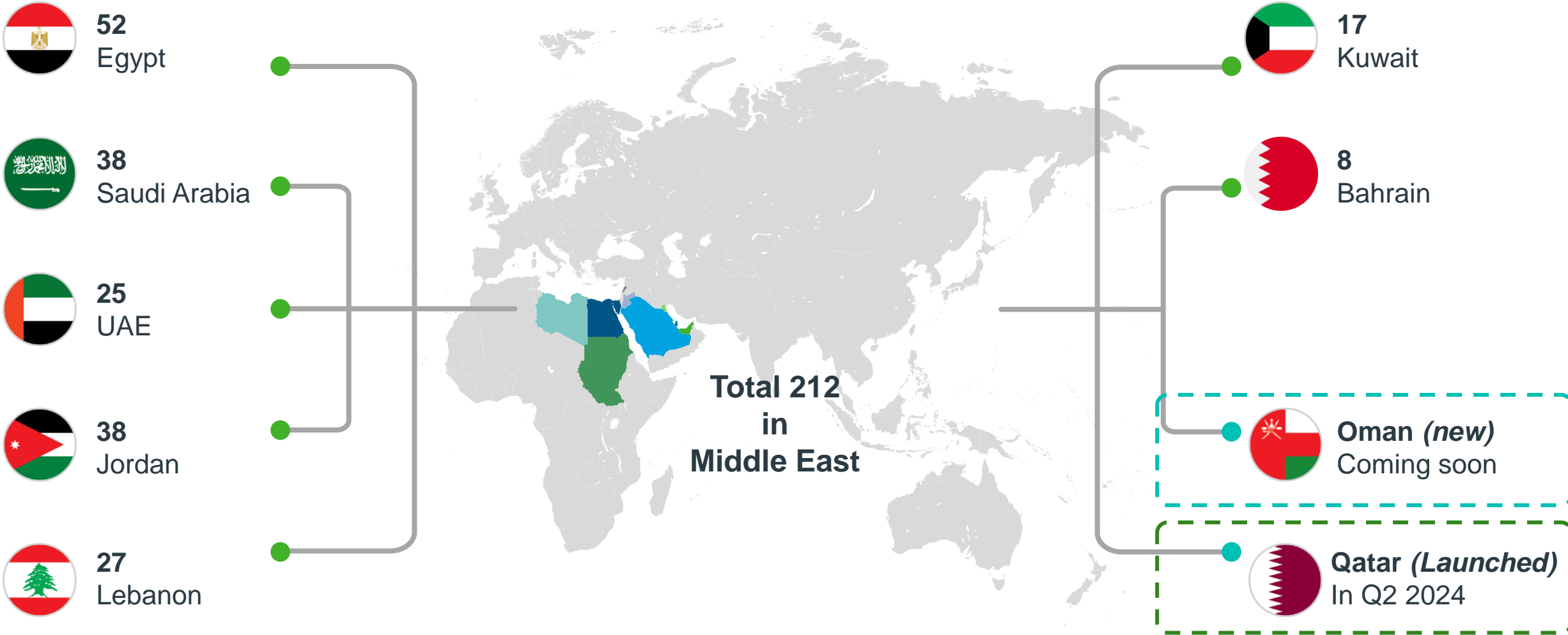


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Number of collaborating data suppliers in the ME countries

More than 200 collaborating Data Suppliers in the ME region covering 7 countries since 1971



IQVIA ME Data Coverage

We archived many deals recently to reach to ~ 97% actual transaction in top 3 countries, in addition to enhance the coverage dramatically in Lebanon and Jordan



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 (census) 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

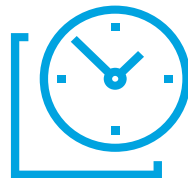
Audit available in Flexview

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

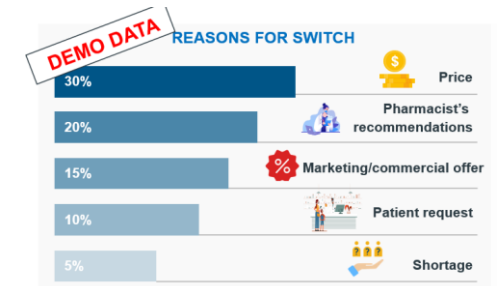


Deliverables/KPI:

- 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.

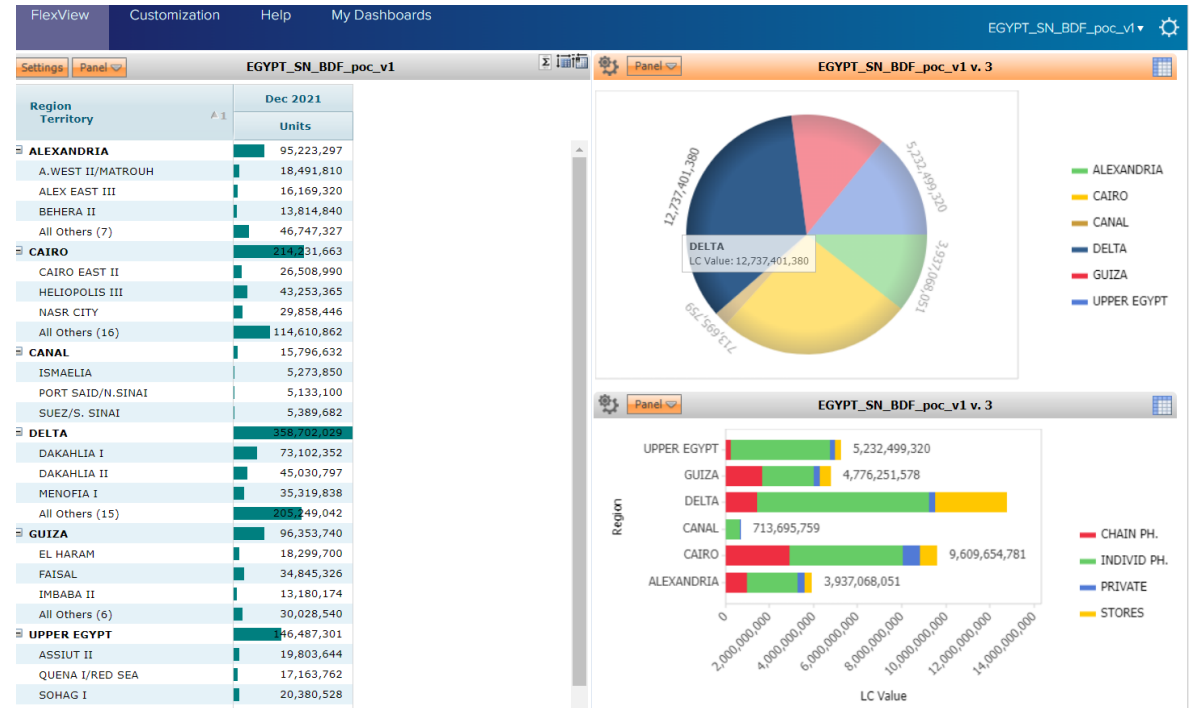


SSS: Sub national sector split Flexview

Launch Q1-2024

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.



Jordan consumer sell out data

Jordan Sell Out Data covers **all sales transactional channel** from pharmacies to end patient/consumer. Collected **electronically** from **100 Pharmacies** across Jordan with of back Data.

5 Millions Transactions included

Frequency

All products sold to consumers are recorded in the audit and released monthly



National

- National Level



Launch Date

- Q1-2024

~10,000+ SKU's PEC, OTC & NUT

100 Pharmacies Panel



Data collected from 100 Pharmacies across different regions in Jordan



Back Data

12 Months



Pharma Sell Out

Based on ATC Classification



OTC Sell Out

Based on OTC classification



Nutrition Sell Out

OTC classification with measure in Kilogram



Personal Care Sell Out

Dermo cosmetics



Patient Care Sell Out

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

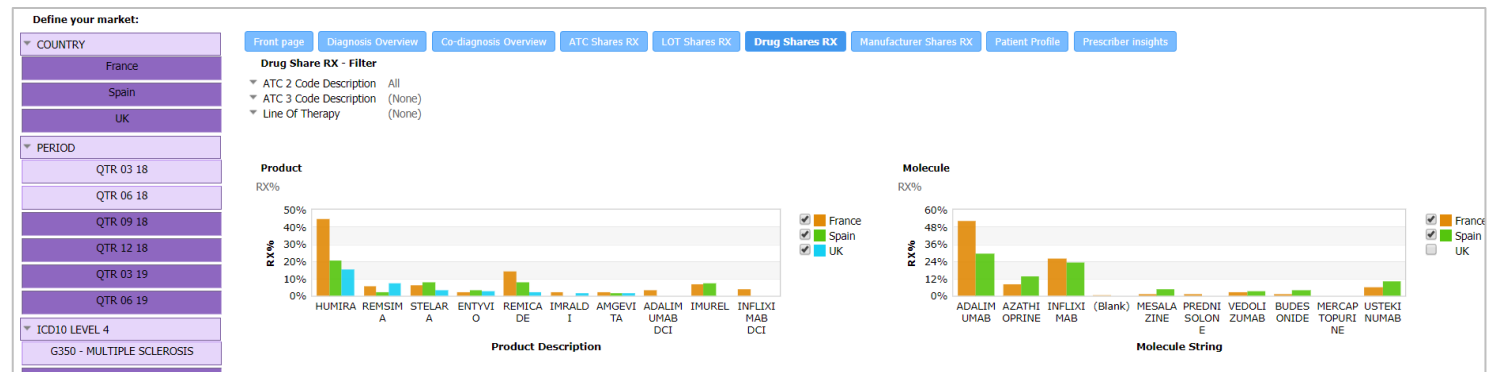
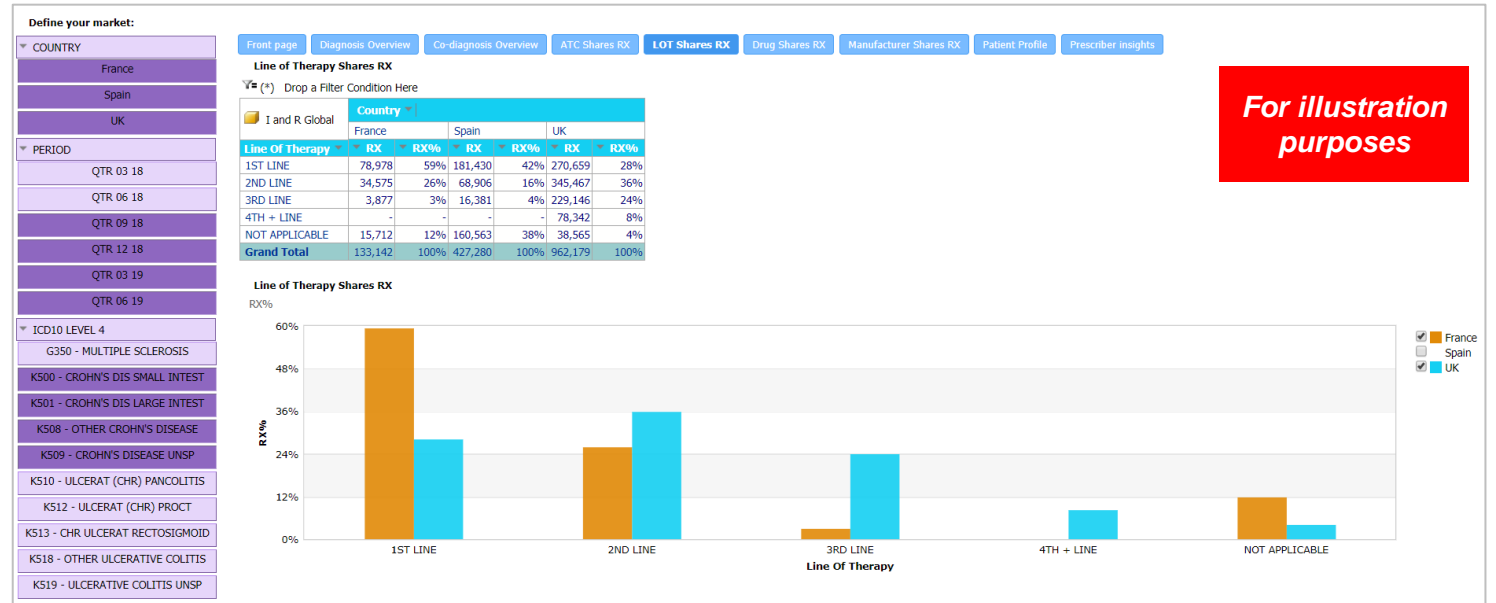
Diagnosis insights autoimmune – Get easy access to the best-in-class reports and visualizations with fully dynamic functionality

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

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	<p>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</p>	
Focus	<p>Time Period: MAT Q2 2020 to MAT Q2 2024¹ Measures: Value (USD) and Volume (Units) Analysis conducted at constant exchange rates and at ex-factory price level²</p>	
	<p>Exchange rates per 1 USD:</p> <ul style="list-style-type: none"> Algeria: 134.58 DZD Egypt: 47.60 EGP Fr. West Africa: 0.93 Jordan: 0.71 JOD Kuwait: 0.31 KWD 	<ul style="list-style-type: none"> Morocco: 10.01 MAD Saudi Arabia: 3.75 SAR South Africa: 18.57 ZAR Tunisia: 3.13 TND UAE: 3.67 AED
Report release date	Sep 2024	
Analytical timeframe	MAT Q2 2024	

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 Q2 2023 vs. MAT Q2 2024 growth
CAGR	Compound Annual Growth Rate for period MAT Q2 2020 to MAT Q2 2024
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



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Thank You

