

## IHS ECONOMICS

# Market Access in the Middle East

## How Pricing Reform Impacts Pharmaceutical Uptake Strategies

Despite political and social unrest percolating in parts of the region, the Middle East pharmaceutical market is experiencing strong growth. This growth is spurred by an increasing middle class and rising rates of chronic disease, such as type-2 diabetes. Although the strong growth ensures an attractive market, characteristics such as rigid price controls, low per capita spending on health in some regions, and the GCC price harmonisation process can make navigating the landscape challenging.

Leveraging primary interviews with industry, physicians, and payor, secondary research and regional market access expertise, Market Access in the Middle East: How Pricing Reform Impacts Pharmaceutical Uptake Strategies provides the insights and analysis of the region needed to fully capitalise on this growing market.

### Answering your key questions

- What are the opportunities and challenges for launching drugs and ensuring strong uptake in the Middle East?
- What is the current pricing and reimbursement framework and legislation for both branded drugs and biosimilars in these markets and what will future legislation yield?
- What are the main drivers for uptake for both branded and biosimilar products?
- What are the best practice recommendations for market access?

### Country coverage

- Saudi Arabia
- UAE
- Egypt
- Turkey
- GCC (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, UAE)

### Deliverables

- Report available online via our MyInsight platform and in PDF
- Microsoft PowerPoint

## Meet our experts

**Gustav Ando** leads the Healthcare and Pharma practice at IHS. Formerly a healthcare analyst, he has extensive experience in the fields of market access, therapeutic development, drug safety, emerging markets, and health outcomes. Previously, Gustav worked with pre-merger Pharmacia Corporation in New Jersey and Pharmacia AB in Stockholm. He is a graduate of politics from the University of Durham and has a Master's degree in international studies from the University of Uppsala, Sweden, specialising in healthcare politics.

**Cecilia Chui** is a senior analyst within the multi-client study team. Prior to joining IHS, Cecilia was a research scientist in both industry and academia, specialising in infectious diseases and vaccinology. She holds a PhD in Clinical Medicine from University of Oxford, and a BSc in Biochemistry from Imperial College London. Her interests include pricing and reimbursement, market access strategies and emerging markets. Cecilia speaks fluent Chinese.

**Tania Rodrigues** is a senior research analyst in the Multi-Client Study and the EMEA consulting team, specializing in market access, pricing and reimbursement and corporate strategies. Prior to IHS, Tania worked as a research scientist in the biotech field. Tania has a BSc (Hons) in Biotechnology from University College London (UCL) and a Masters degree in Computational Biology from Birkbeck College (University of London). She is fluent in Portuguese.

Our experts and our supporting team are available to answer your questions about the study and its findings.

## IHS Life Sciences

The IHS Life Sciences practice provides a portfolio of intelligence solutions to optimize the performance of companies and organizations across the pharmaceutical, biotech, generics, medical device, hospital, insurance, and public sectors. Our key focus is to provide actionable insights to support strategic decision making, particularly in the fields of market access, pricing and reimbursement (P&R), emerging markets, generics strategies, therapeutic development pathways, forecasting and market sizing, and general competitive intelligence. This analysis is based on our proprietary global data in pharmaceutical pricing, reimbursement information, clinical trials, and healthcare forecasting.

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### ABOUT IHS

IHS (NYSE: IHS) is the leading source of insight, analytics and expertise in critical areas that shape today's business landscape. Businesses and governments in more than 150 countries around the globe rely on the comprehensive content, expert independent analysis and flexible delivery methods of IHS to make high-impact decisions and develop strategies with speed and confidence. IHS has been in business since 1959 and became a publicly traded company on the New York Stock Exchange in 2005. Headquartered in Englewood, Colorado, USA, IHS is committed to sustainable, profitable growth and employs about 8,800 people in 32 countries around the world.

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