

تحقیقات بازار؛

برای ورود به بازارهای بین المللی

*Pharmaceutical Market Research:
Focusing on Market Development*

علیرضا یکتادوست حسینی

داروساز، PhD مدیریت و اقتصاد دارو

ایران فارما هشتم

۶ مهر ۱۴۰۲

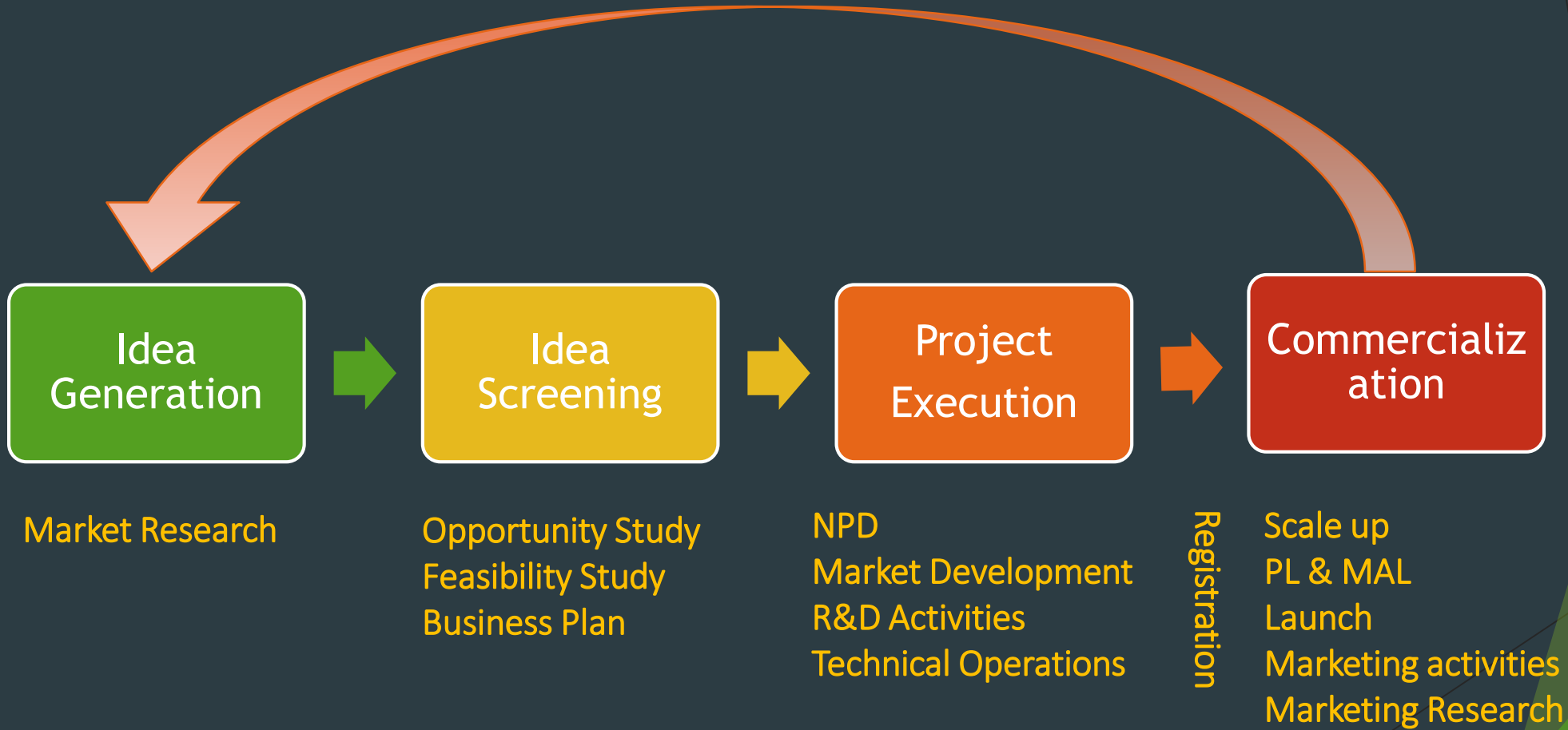


BUSINESS DEVELOPMENT

Business Development Emphasis



چهار مرحله مهم در موفقیت پروژه های توسعه کسب و کار (از بازار تا بازار)



معیارهای انتخاب ایده های جدید در توسعه بازار

▶ شاخص های سلامت و دموگرافیک (جمعیت شناختی)

▶ سازمان جهانی بهداشت

▶ بانک جهانی

▶ موسسه IHME



Health Indicators

Demographic Indicators

- Population, total: 7.95 billion
- Life Expectancy at birth, total (years): 71
 - Life expectancy at birth, female (years): 74
 - Life expectancy at birth, male (years): 69
- Population growth (annual %): 0.8
- Population ages 65 and above (% of total population): 10
- Population ages 0-14 (% of total population): 25
- Adolescent fertility rate (births per 1,000 women ages 15-19): 42
- Fertility rate, total (births per woman): 2.3
- Birth rate, crude (per 1,000 people): 17

Health Indicators

Demographic Indicators

- Death rate, crude (per 1,000 people): 9
- Maternal mortality ratio (per 100,000 live births): 223
- Mortality rate, neonatal (first 28 days) (per 1,000 live births): 18
- Mortality rate, infant (Under-1) (per 1,000 live births): 28
- Mortality rate, under-5 (per 1,000 live births): 38
- Cause of death, by communicable diseases and maternal, prenatal and nutrition conditions (% of total): 18
- Cause of death, by injury (% of total): 8
- Cause of death, by non-communicable diseases (% of total): 74

Health Indicators

Demographic Indicators

- Hospital beds (per 1,000 people): 2.9
- Number of surgical procedures (per 100,000 population)
- Diabetes prevalence (% of population ages 20 to 79): 9.8
- Immunization, DPT (% of children ages 12-23 months): 81
- Immunization, measles (% of children ages 12-23 months): 82
- Incidence of tuberculosis (per 100,000 people): 134
- Prevalence of anemia among children (% of children ages 6-59 months): 40
- Prevalence of HIV, total (% of population ages 15-49): 0.7
- Prevalence of overweight, weight for height (% of children under 5): 0.8 to 29.6

معیارهای انتخاب ایده های جدید در توسعه بازار

▶ شاخص های اقتصادی

▶ بانک جهانی



Economic Indicators

- GDP (current US\$): 100.56 trillion
- GDP growth (annual %): 3.1
- GDP, PPP (current international \$): 164.16 trillion
- GDP per capita (current US\$): 12647
- GDP per capita, PPP (current international \$): 20645
- Imports of goods and services (% of GDP): 30.1
- Inflation, consumer prices (annual %): 8.3

معیارهای انتخاب ایده های جدید در توسعه بازار

▶ شاخص های اقتصاد سلامت و اقتصاد دارو

▶ سازمان جهانی بهداشت

▶ بانک جهانی

▶ موسسه IHME



Health Economics Indicators

- Current health expenditure (% of GDP): 10.89
- Current health expenditure per capita (current US\$): 1177
- External health expenditure (% of current health expenditure): 0.24
- Out-of-pocket expenditure (% of current health expenditure): 16.36

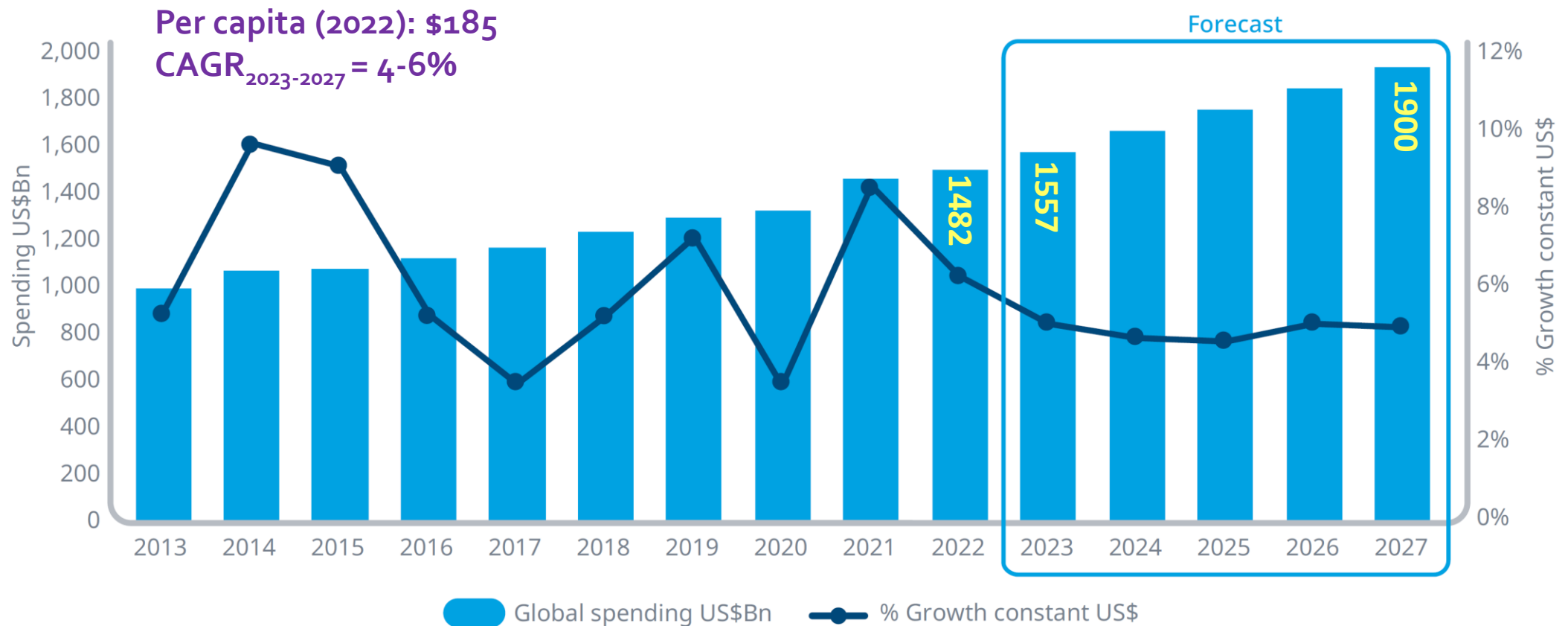
Pharmaceutical Market Indicators

- Pharmaceutical expenditure (% of THE): 14%
- Pharmaceutical expenditure (billion US\$): 1480
 - CAGR₂₀₂₃₋₂₀₂₇: 4-6%
- Pharmaceutical Rx sales (billion US\$): 1140
 - CAGR₂₀₂₂₋₂₀₂₈: 6.1%
- Pharmaceutical expenditure per capita (current US\$): 185
- Pharmaceutical consumption per capita (DDD): 264
- R&D expenditure (billion US\$): 238
- Share of finance source of expenditure
 - Public, private, OOP, other
- Country category
 - Developed, pharmerging, lower-income

هزینه کرد دارویی دنیا در ۲۰۲۲ و پیش بینی ۲۰۲۷

هزینه کرد ۱۴۸۰ میلیارد دلاری (۱.۵ تریلیون دلار) در ۲۰۲۲ و برآورد هزینه کرد ۱.۹ تریلیون دلاری در ۲۰۲۷

Exhibit 14: Global medicine market size and growth 2013-2027

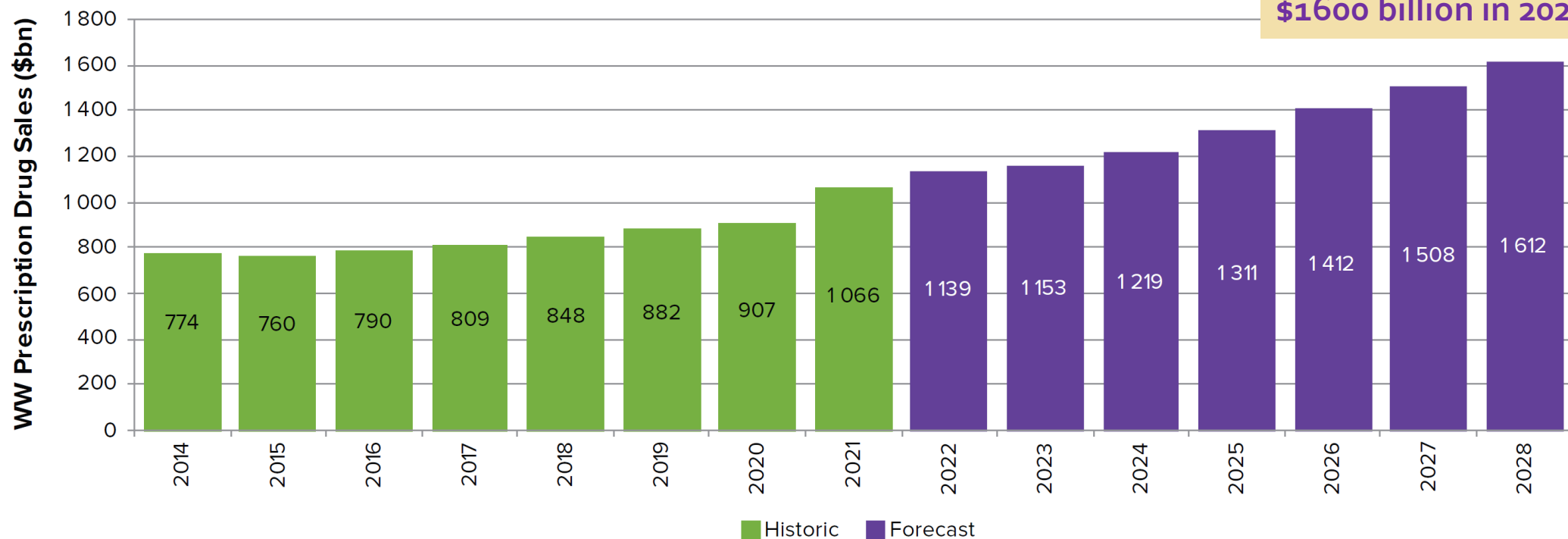


Source: IQVIA Market Prognosis, Sep 2022; IQVIA Institute, Nov 2022.

فروش داروهای نسخه ای دنیا در ۲۰۲۲ و پیش بینی ۲۰۲۸

فروش ۱۱۴۰ میلیارد دلاری در ۲۰۲۲ و پیش بینی فروش ۱۶۰۰ میلیاردی در ۲۰۲۸

Figure 6: Worldwide total prescription drug sales (2014-2028)



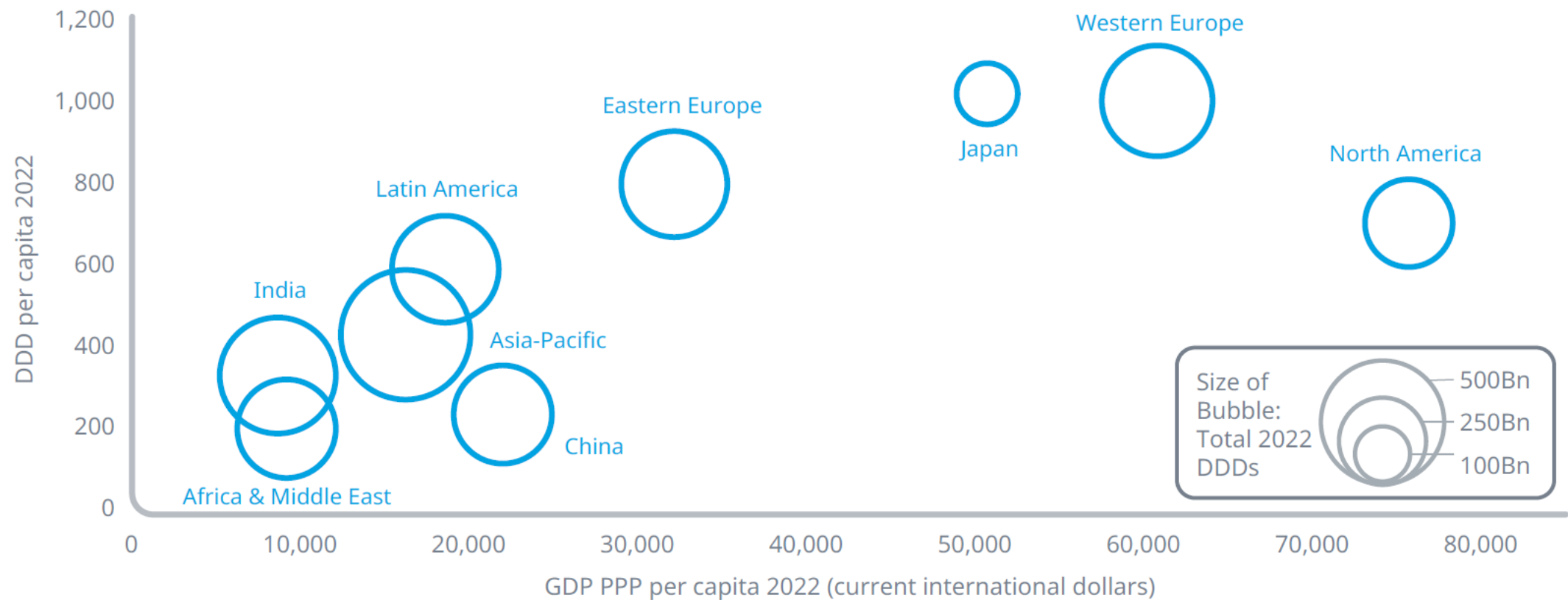
Note: 6.1% CAGR 2021-2028

Source: Evaluate Pharma® (Aug 2022)

سرانه مصرف مقاداری دارو در ۲۰۲۲

سرانه ۲۶۴ (بر حسب DDD)

Exhibit 10: Defined Daily Doses (DDD) per capita by region compared to per capita gross domestic product PPP, current international dollars

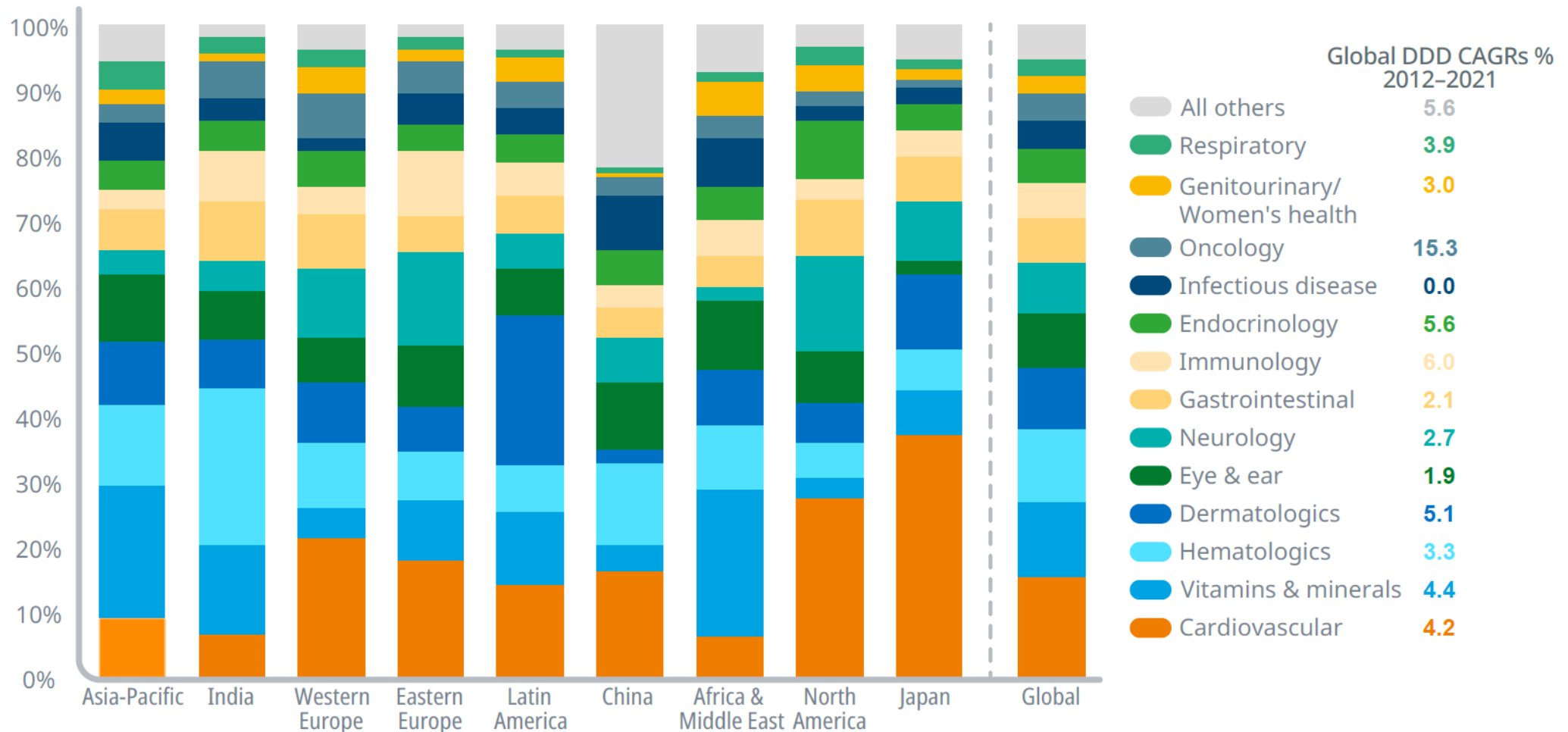


Source: IQVIA MIDAS, Jun 2022; IQVIA Institute, Dec 2022; The World Bank, Jul 2022; International Monetary Fund, Oct 2022.

مقایسه سرانه مصرف مقدراری دارو در ۹ ناحیه جغرافیایی دنیا در ۲۰۲۱

بیشترین سهم مربوط به داروهای قلبی عروقی و بیشترین رشد مربوط به داروهای اونکولوژی

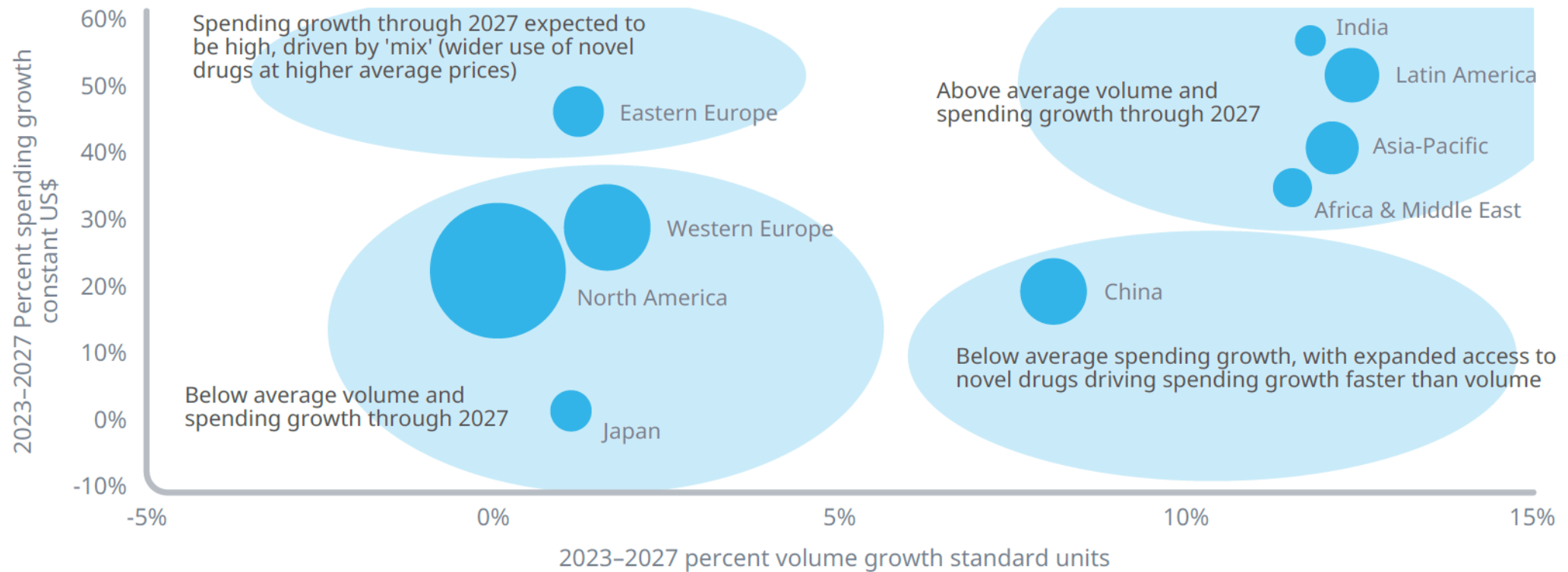
Exhibit 13: Share of Defined Daily Doses (DDD) by therapy area in 9 regions and globally, 2021



پیش بینی رشد سرانه مصرف مقدراری دارو در ۹ ناحیه جغرافیایی دنیا تا ۲۰۲۷

بیشترین رشد مصرف مقدراری و پولی مربوط به هند، آمریکای لاتین، آسیا پاسیفیک و آسیا و خاورمیانه

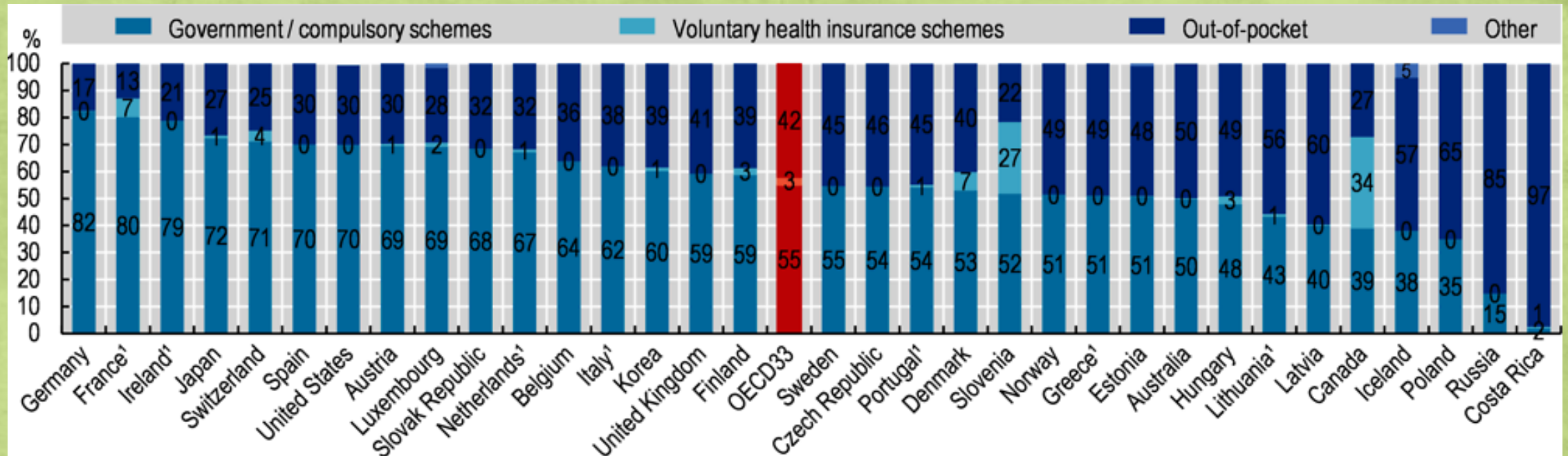
Exhibit 15: Spending and volume growth by region



Source: IQVIA Market Prognosis, Sep 2022; IQVIA Institute, Nov 2022.

سهم منابع تامین مالی هزینه‌های دارویی در کشورهای مختلف سال ۲۰۱۹

فرانسه و آلمان به ترتیب با ۱۳ و ۱۷ درصد کمترین سهم پرداخت از جیب بیمار (داروخانه‌های سرپایی)



سهم سطوح مختلف اقتصادی دنیا از داروهای برند و غیر برند

سهم داروهای برند در کشورهای توسعه یافته بالای ۷۰ درصد و در کشورهای کمتر توسعه یافته حدود ۳۰ درصد

		ORIGINAL BRANDS	NON-ORIGINAL BRANDS	UNBRANDED GENERICS	OTHER	TOTAL
Spending 2022 US\$	Global	902.1	244.5	150.2	185.5	1,482.3
	Developed	788.8	109.3	101.0	89.3	1,088.3
	10 Developed	722.4	83.9	90.8	71.9	968.9
	Other developed	66.4	25.4	10.2	17.4	119.4
	Pharmerging	105.7	124.4	47.8	93.0	370.8
	Lower-income countries	7.7	10.8	1.5	3.2	23.2

Spending 2027 US\$	Global	\$1,155-1,185	\$325-355	\$160-190	\$215-245	\$1,900-1,930
	Developed	\$1,000-1,030	\$150-165	\$105-115	\$98-108	\$1,370-1,400
	10 Developed	\$910-940	\$117-127	\$92-102	\$75-85	\$1,207-1,237
	Other developed	\$83-103	\$34-38	\$12-16	\$21-25	\$156-176
	Pharmerging	\$133-153	\$157-177	\$62-64	\$114-134	\$487-518
	Lower-income countries	\$9-11	\$12-16	\$2-3	\$2.5-5.5	\$29-33

معیارهای انتخاب ایده های جدید در توسعه بازار

- ▶ شاخص های مربوط به بازار دسته های درمانی
- ▶ موسسات بین المللی تحقیقات بازار
(IMS/IQVIA, Evaluate, Fitch, BMI, ...)
- ▶ آمارهای کشور
- ▶ آمارنامه دارویی
- ▶ انجام پیمایش



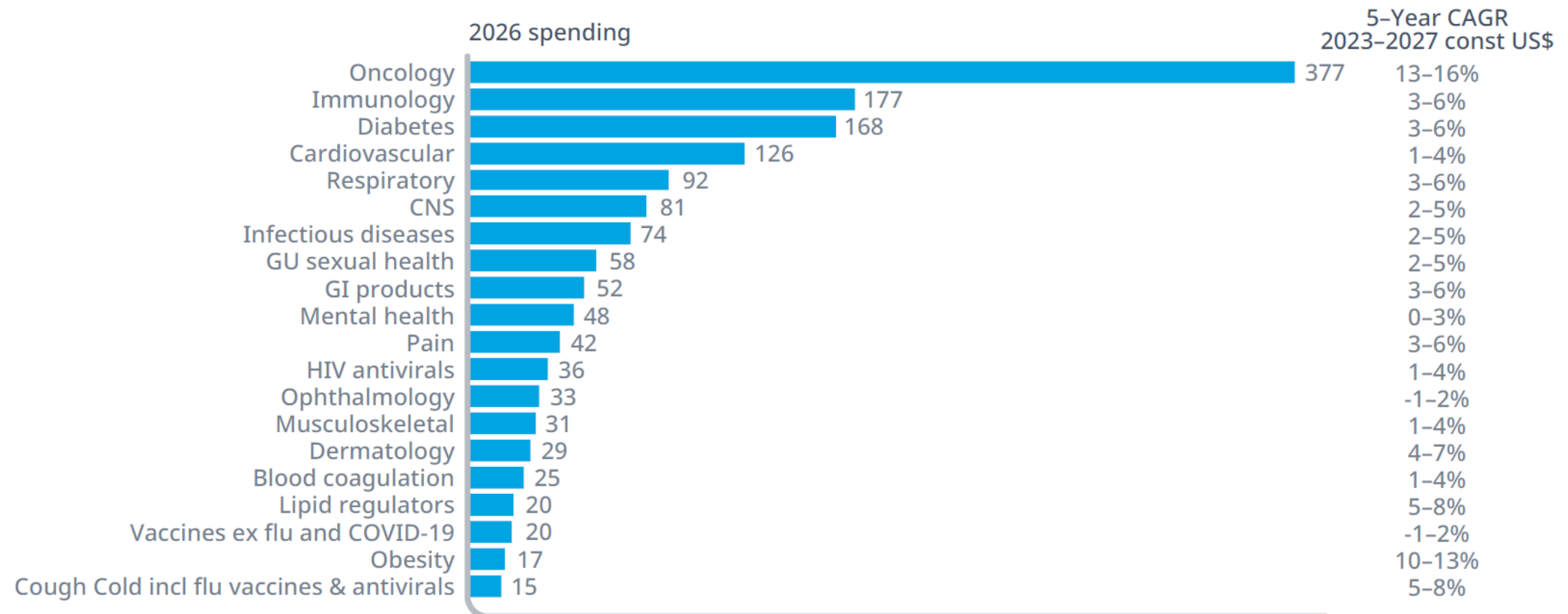
Therapeutic Groups

- Top therapy areas (Size/Spending)
- Top therapy areas (Growth)
 - 5-yr CAGR (historic and forecasted)
- Pharmaceutical market classes
 - POM/Rx vs. NPM/OTC
 - Brand, Non-brand (Generic)
 - Conventional vs. biotech.
 - Specialty, non-specialty

۲۰ گروه درمانی برتر در ۲۰۲۶

داروهای انکولوژی، ایمونولوژی، دیابت و قلبی عروقی

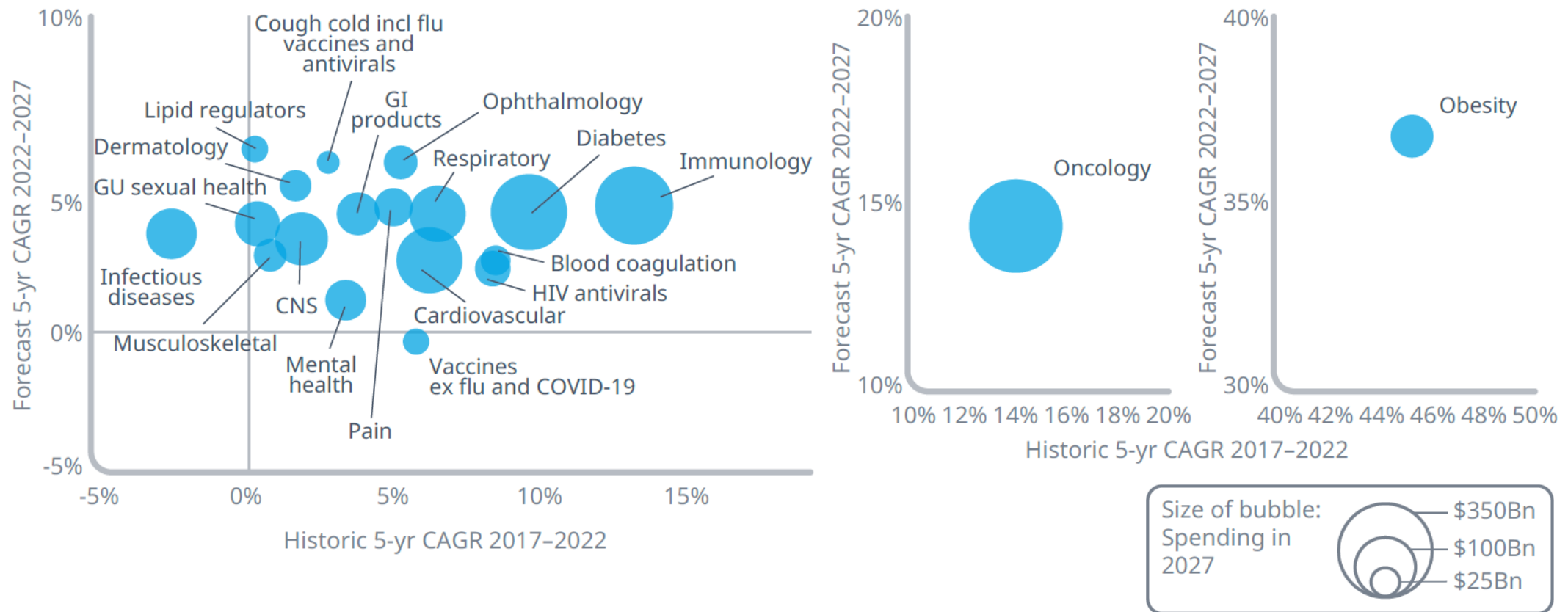
Exhibit 34: Top 20 therapy areas in 2027 in terms of global spending with forecast 5-year CAGRs, const US\$



روند رشد گذشته و آتی ۲۰ گروه درمانی برتر

مقایسه رشد متوسط ۵ ساله گذشته با رشد متوسط ۵ ساله آینده ۲۰ دسته درمانی برتر

Exhibit 35: Global historic and forecast growth for top 20 therapy areas

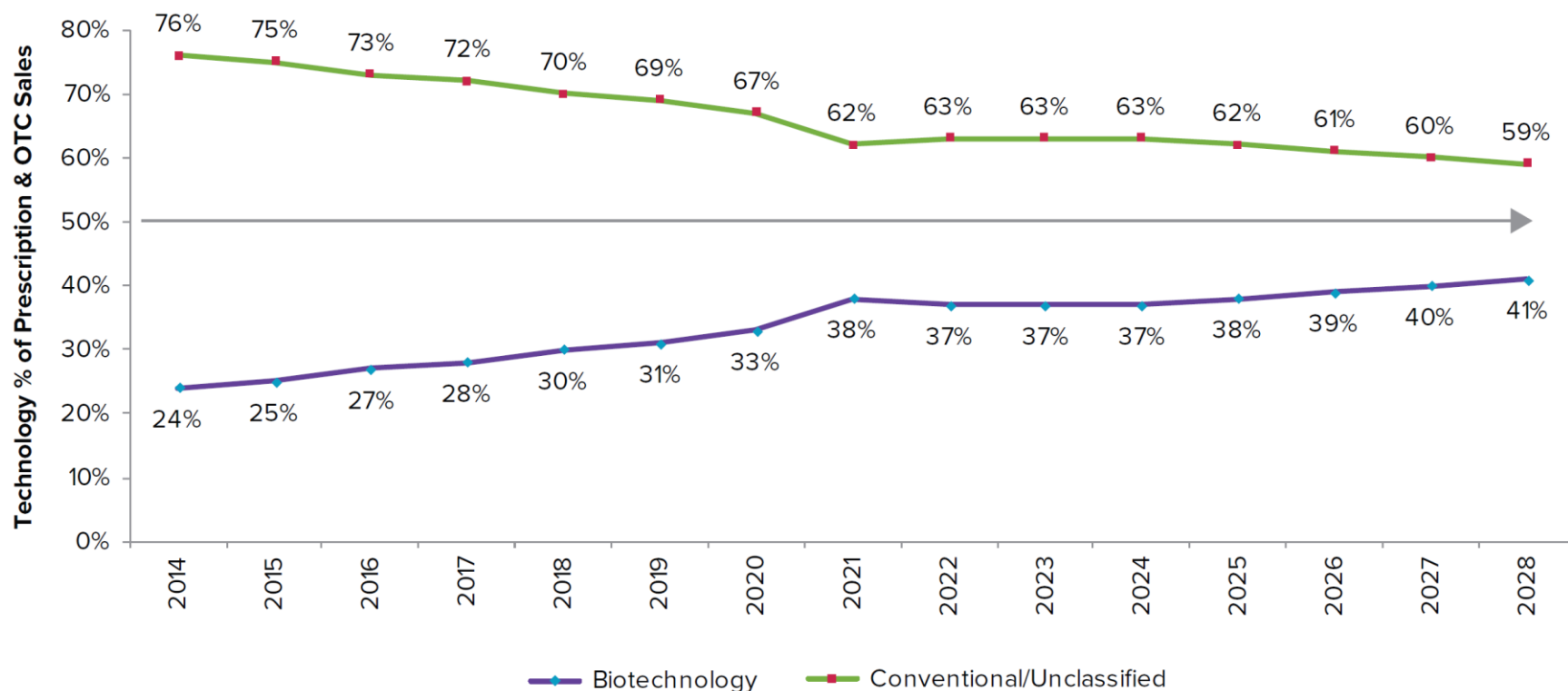


Source: IQVIA Forecast Link, IQVIA Institute, Nov 2022.

رشد فزاینده سهم داروهای بایوتک از بازار دارویی دنیا

سهم ۳۷ درصدی داروهای بایوتک از بازار دارویی دنیا در ۲۰۲۲

Figure 8: Worldwide prescription drug and OTC pharmaceutical sales: biotech vs. conventional technology



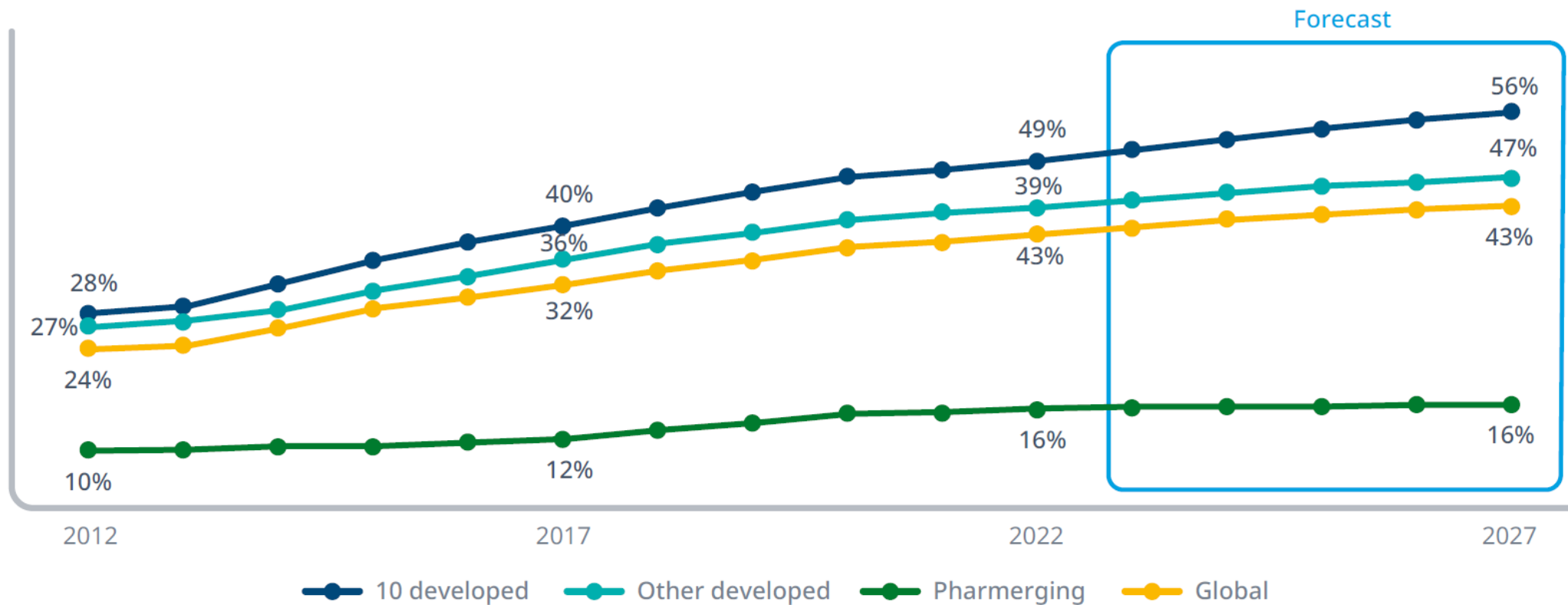
Iran: Share of locally produced biotech products
9% in value and 0.03% in volume (Year 1397)

Source: Evaluate Pharma® (Aug 2022)

رشد سهم داروهای تخصصی از هزینه کرد دارویی تا سال ۲۰۲۷

رشد سهم داروهای تخصصی از ۲۴ درصد به ۴۳ درصد در دنیا

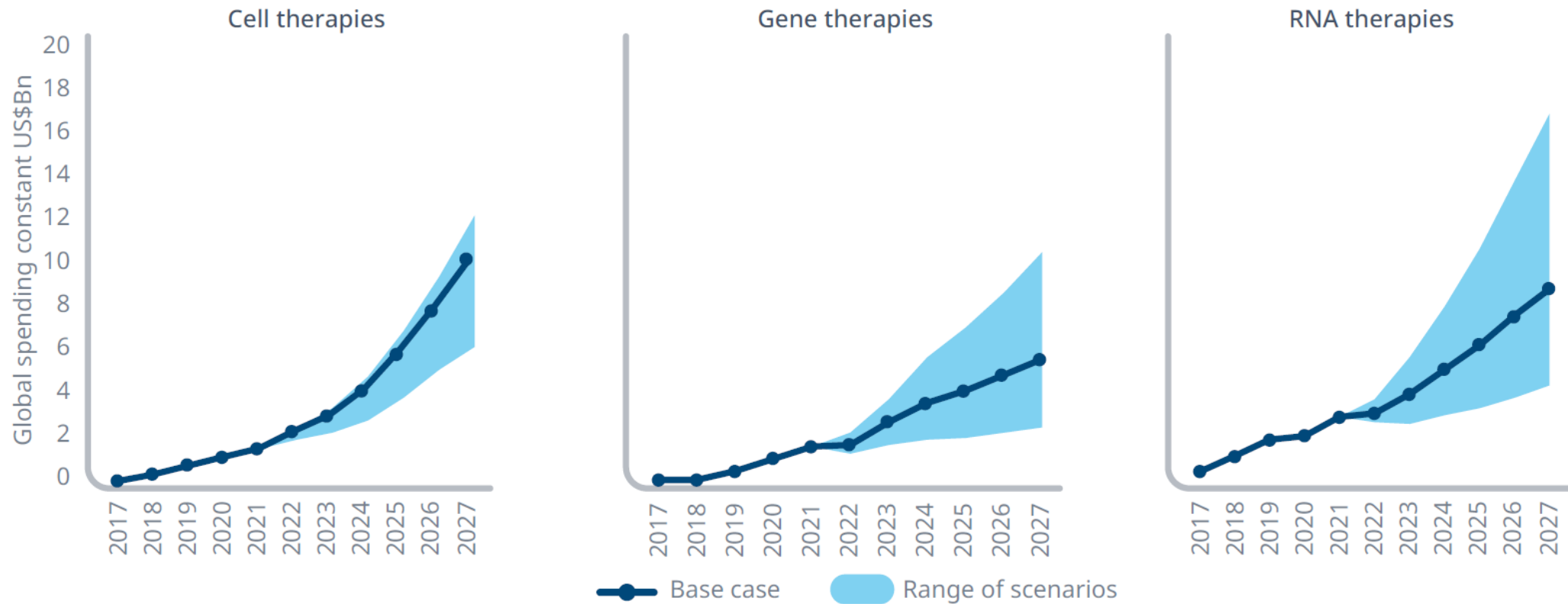
Exhibit 33: Specialty medicines share of spending



داروهای مدرن

روند رشد فروش داروهای سل تراپی، ژن تراپی و RNA

Exhibit 42: Cell, gene and RNA therapeutics



Source: Company Financials; IQVIA Institute Nov 2022.

معیارهای انتخاب ایده های جدید در توسعه کسب و کارهای دارویی

▶ جذابیت بازار

▶ سایز (Volume & Value) بازار محصول

▶ رشد بازار (CAGR) محصول

▶ وضعیت چرخه عمر محصول

▶ قیمت واحد محصول

▶ حاشیه سود

▶ تعداد رقبا (در تولید و واردات)

▶ Positioning محصول

▶ نوع مشتری محصول

▶ OTC/NPM vs. POM

▶ بیمارستانی و غیر بیمارستانی

▶ خصوصی و دولتی

▶ جذابیت کلینیکال (بالینی)

▶ نظر صاحب نظران (KOLs)

▶ اثر بخشی، ایمنی و عوارض جانبی

▶ کامپلاینس (پذیرش) بیمار

▶ عوامل تکنولوژیک و تامین منابع

▶ سطح تکنولوژی فرمولاسیون (دانش R&D)

▶ سطح تکنولوژی خط تولید محصول (هزارد، ...)

▶ تیراژ مورد نیاز محصول (LVHV, HVLV, ...)

▶ تامین مواد (Procurement)

▶ عوامل رگولاتوری و دسترسی

▶ سیاست‌ها: ملی، زنجیره تامین، قیمت گذاری

▶ ثبت (زمان و هزینه): شرکت، خط تولید و محصول

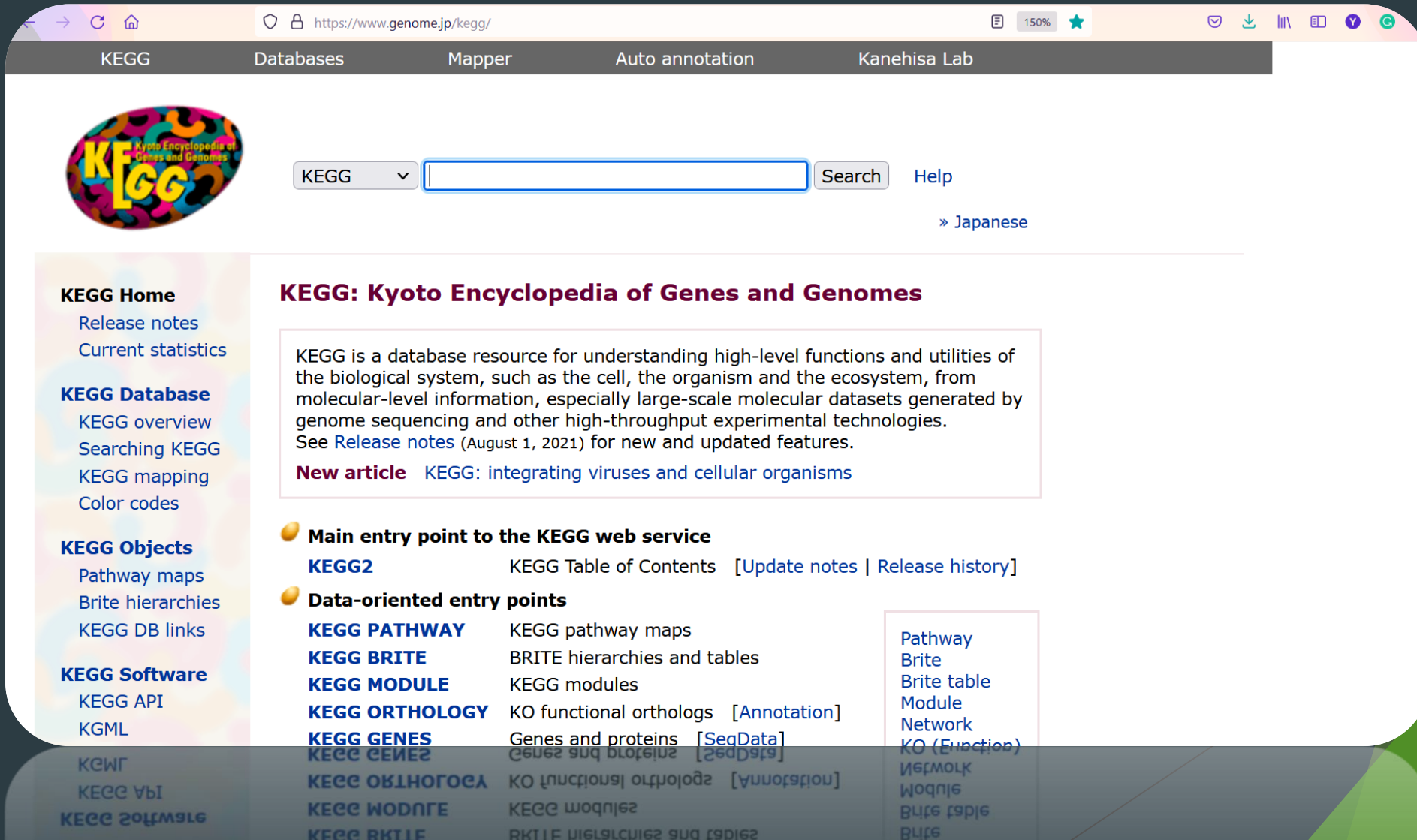
▶ وضعیت Patent

▶ وجود یا عدم وجود در فهرست دارویی (PE)

▶ وجود یا عدم وجود در فهرست بیمه ها



KEGG



The image shows a screenshot of the KEGG website homepage. At the top, there is a navigation bar with links for "KEGG", "Databases", "Mapper", "Auto annotation", and "Kanehisa Lab". Below the navigation bar is a search bar with a dropdown menu set to "KEGG", a search input field, and a "Search" button. To the right of the search bar is a "Help" link and a link to "» Japanese".

The main content area features a large heading: "KEGG: Kyoto Encyclopedia of Genes and Genomes". Below this heading is a text box containing the following information:

KEGG is a database resource for understanding high-level functions and utilities of the biological system, such as the cell, the organism and the ecosystem, from molecular-level information, especially large-scale molecular datasets generated by genome sequencing and other high-throughput experimental technologies. See [Release notes](#) (August 1, 2021) for new and updated features.

New article [KEGG: integrating viruses and cellular organisms](#)

Below the text box are two main sections:

- Main entry point to the KEGG web service**
 - KEGG2** [KEGG Table of Contents](#) [[Update notes](#) | [Release history](#)]
- Data-oriented entry points**
 - KEGG PATHWAY** [KEGG pathway maps](#)
 - KEGG BRITE** [BRITE hierarchies and tables](#)
 - KEGG MODULE** [KEGG modules](#)
 - KEGG ORTHOLOGY** [KO functional orthologs](#) [[Annotation](#)]
 - KEGG GENES** [Genes and proteins](#) [[SegData](#)]

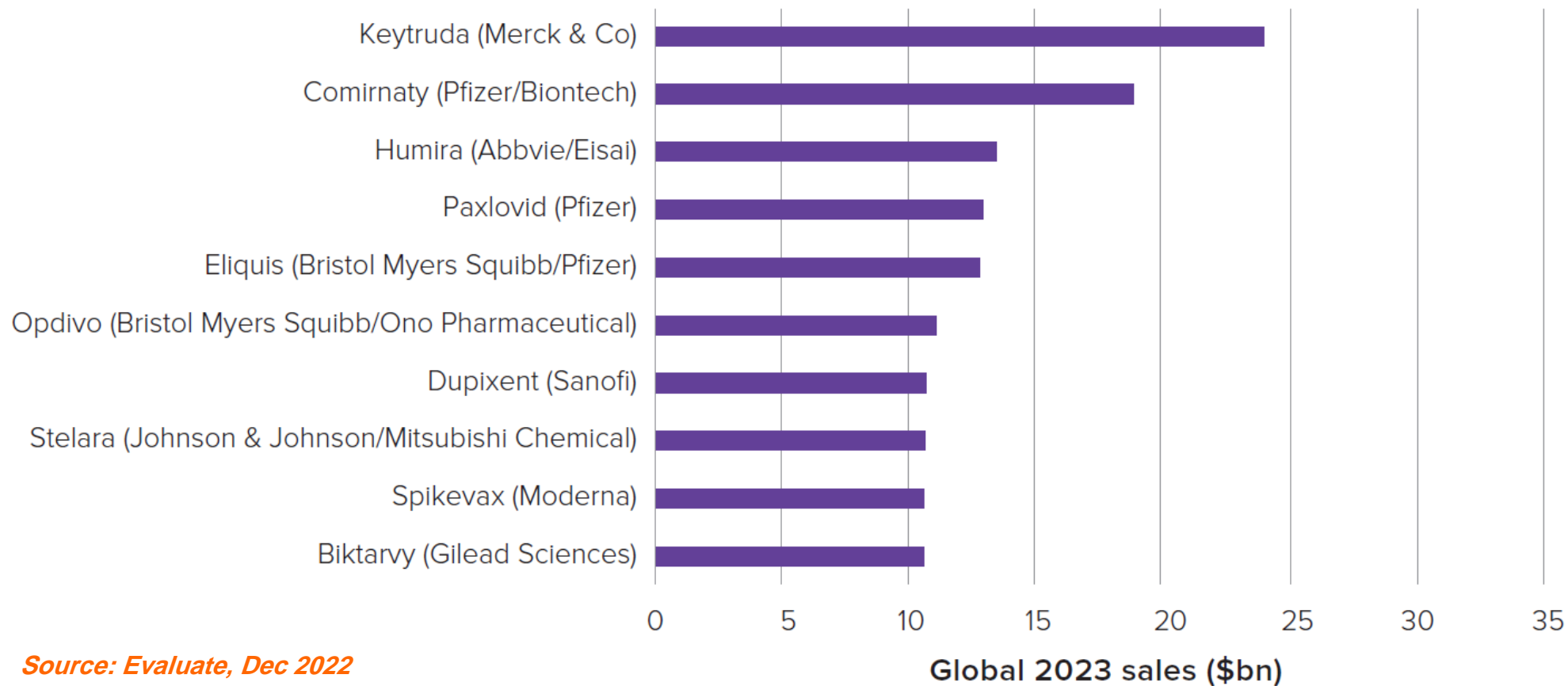
On the left side of the page, there is a sidebar with the following sections:

- KEGG Home**
 - [Release notes](#)
 - [Current statistics](#)
- KEGG Database**
 - [KEGG overview](#)
 - [Searching KEGG](#)
 - [KEGG mapping](#)
 - [Color codes](#)
- KEGG Objects**
 - [Pathway maps](#)
 - [Brite hierarchies](#)
 - [KEGG DB links](#)
- KEGG Software**
 - [KEGG API](#)
 - [KGML](#)

۱۰ داروی پرفروش دنیا در سال ۲۰۲۳

کیترودا، کومیرناتی و هیومیرا پرفروش ترین داروهای دنیا در ۲۰۲۳

Top selling drugs in 2023

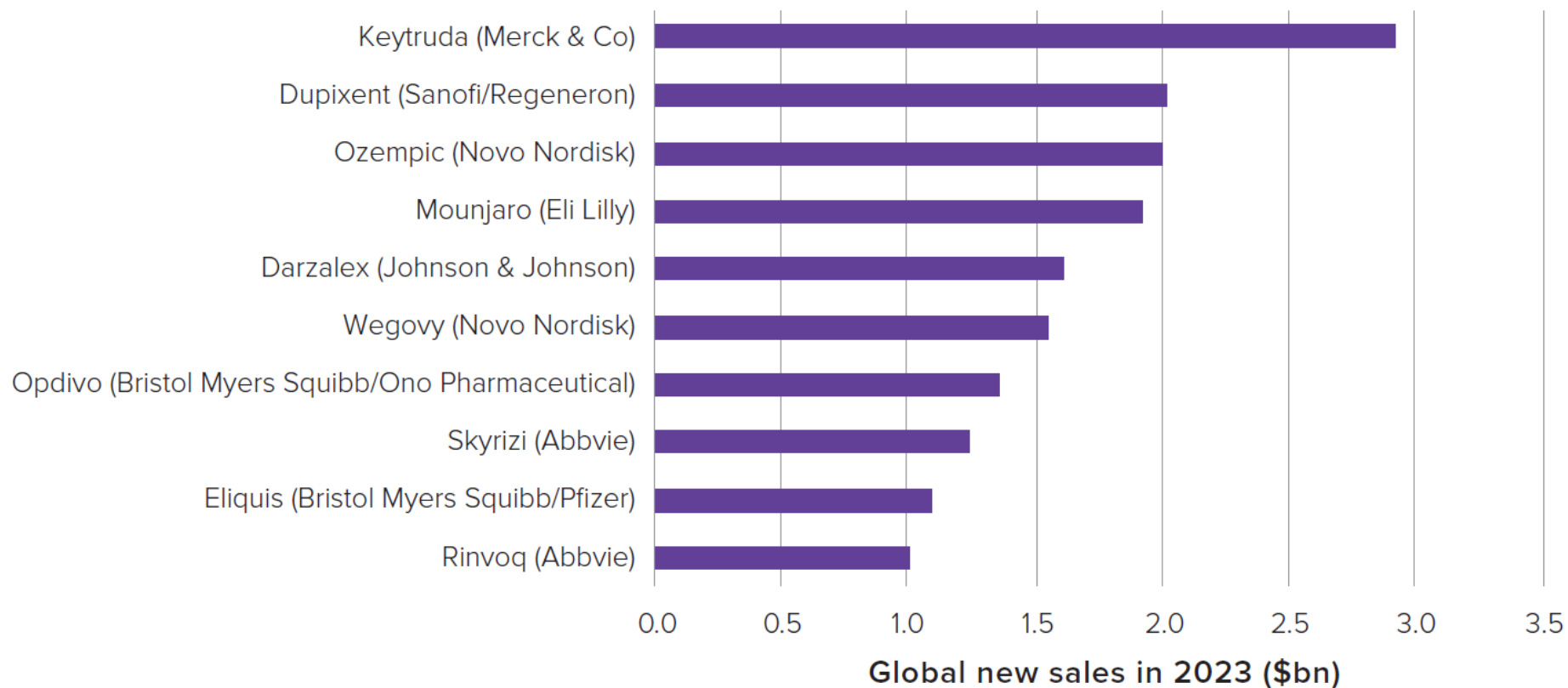


Source: Evaluate, Dec 2022

۱۰ داروی دارای بیشترین رشد فروش در ۲۰۲۳

کیترودا، کومیرناتی و هیومیرا پرفروش ترین داروهای دنیا در ۲۰۲۳

Biggest new sales generators: drugs



Note: includes sales booked by global partners, where relevant.

Source: Evaluate Pharma and Evaluate Vantage.

Source: Evaluate, Dec 2022

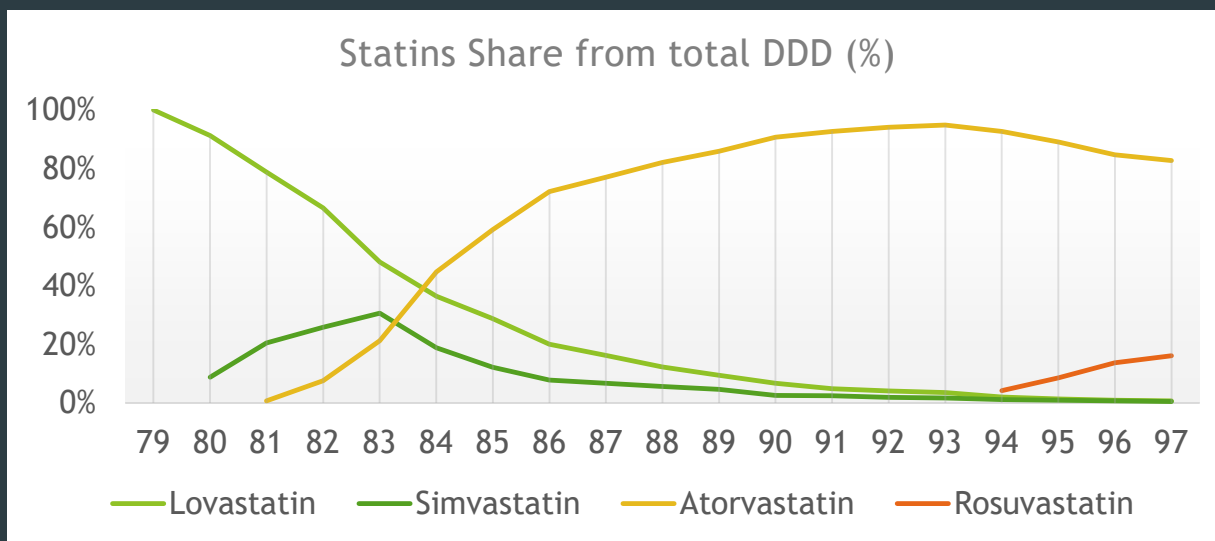
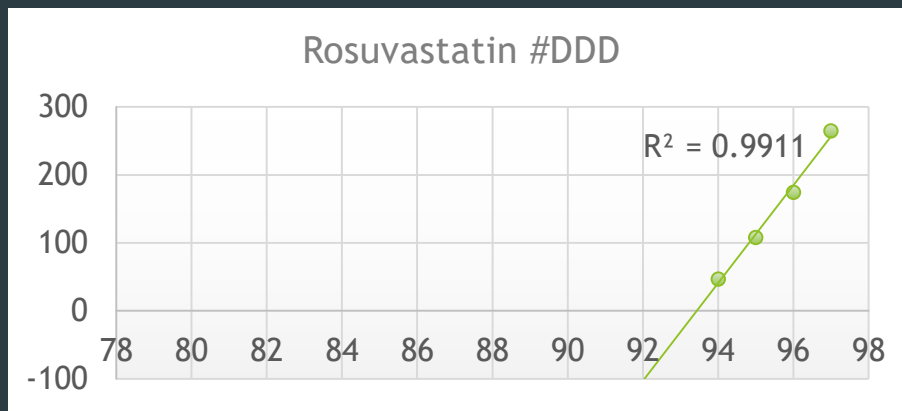
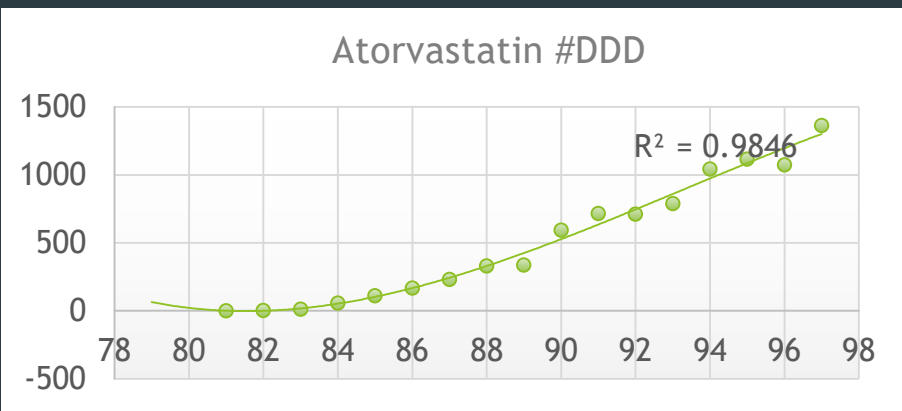
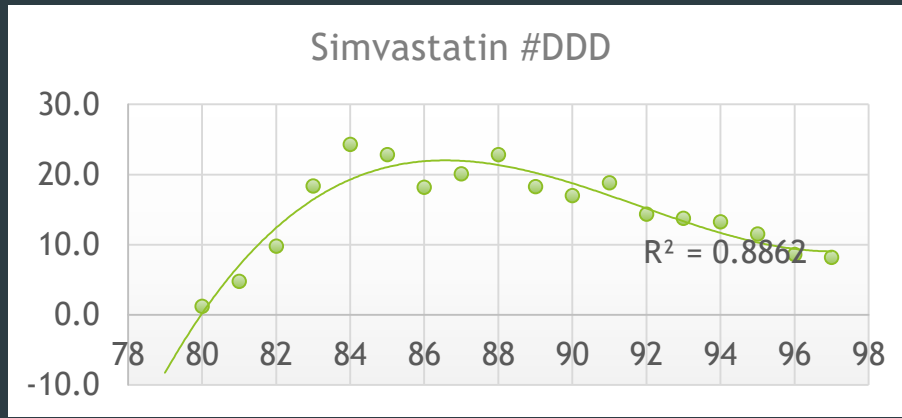
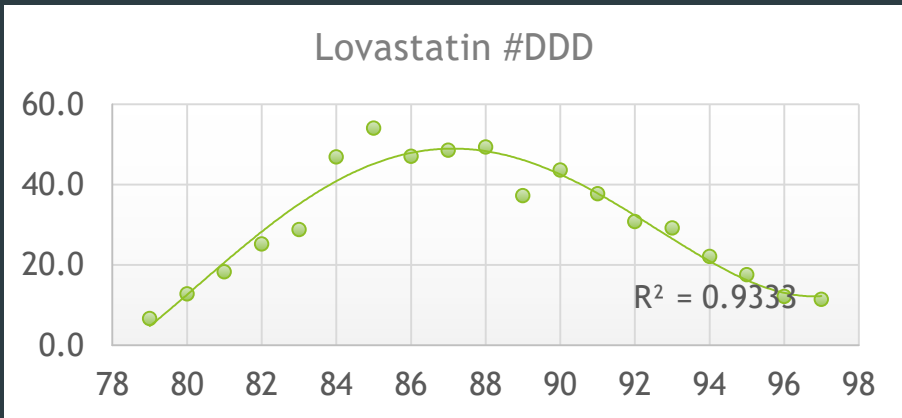
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با ارزش ترین داروهایی که در ۲۰۲۳ لانچ می شوند

کیترودا، کومیرناتی و هیومیرا با ارزش ترین داروها

Biggest potential launches of 2023

Project	Companies involved	Description	Status	2028e sales
Lecanemab	Eisai/Bogen	Anti-amyloid-beta MAb for Alzheimer's disease	PDUFA Jan 6, 2023 (accelerated approval)	\$3.0bn
SRP-9001	Sarepta/Roche	Gene therapy for Duchenne muscular dystrophy	PDUFA May 29, 2023 (accelerated approval)	\$2.2bn
Intravitreal Pegcetacoplan	Apellis	Complement factor C3 inhibitor for geographic atrophy	PDUFA Feb 26, 2023; EMA filing planned for December 2022	\$2.0bn
Donanemab	Lilly	Anti-amyloid-beta MAb for Alzheimer's disease	FDA decision on accelerated approval expected in February 2023	\$1.9bn
RSVPreF3 OA (GSK3844766A)	GSK	Vaccine for older adults against respiratory syncytial virus	PDUFA May 3, 2023. European approval likely mid-late 2023	\$1.8bn
Epcoritamab	Abbvie/Genmab	Anti-CD20 bispecific for lymphomas	PDUFA May 21, 2023 (possibly accelerated decision), filed in EU, for diffuse large B cell lymphoma	\$1.7bn
Zuranolone	Bogen/Sage	Gaba A modulator for major depressive disorder and postpartum depression	NDA for MDD and PPD to be completed by YE'22 with potential for priority review. Analysts assume mid-late 2023 US approval	\$1.5bn
Mirikizumab	Lilly	Anti-IL-23 MAb in development for ulcerative colitis and Crohn's	PDUFA date May 2023 (ulcerative colitis). MAA filed Q1'22, decision expected 2023	\$1.2bn
Etrasimod	Pfizer	S1P 1 modulator for ulcerative colitis	Regulatory filings planned for 2022. Analysts assume late 2023 launch	\$1.2bn
Sotatercept	Merck & Co	Activin receptor 2a regulator for pulmonary arterial hypertension	Filing expected early 2023. Fast track/breakthrough designations in place in US and Europe. Analysts assuming late 2023 launch	\$1.0bn



Pricing (FDFs)

International Medical Products Price Guide

The purpose of this *Guide* is to make price information more widely available in order to improve procurement of quality-assured medicines for the lowest possible prices. Comparative price information is important for getting the best price and this *Guide* is an essential reference for anyone making decisions about medical product procurement.

Welcome to zenRx Research
your ultimate partner in Global Pharmaceutical Pricing Data

Global Pharmaceutical Pricing and Reimbursement Database

FREE - during Beta period until our official Launch Date during later part of 2011

- Best Global Coverage (over 40 top pharma markets)
- Comparisons based on common currency / lowest unit of compound
- International Cross-Reference Price Change Analysis
- Free customized data feeds
- Contact and address information for all Manufacturers and Distributors
- ERP Integration; Customized XML, CSV, RSS formats
- Most up-to-date Pricing Data
- Customizable Price Change Alerts
- Integrated Oncology DDD Analysis Tools
- Unlimited Free Support
- Unlimited Free Customization

• **Free [forever] Subscription for any Governmental Agency**
• **Free [forever] for any user or company in continental Africa**

Australian Government Department of Health

PBS The Pharmaceutical Benefits Scheme

Search for general PBS information

atorvastatin

PBS MEDICINE SEARCH

Browse by Brand Premium

There are three types of premiums:

- [Brand premium](#)
- [Therapeutic group premium](#)
- [Special patient contribution](#)

BRAND PREMIUM POLICY

BRANDS OF PHARMACEUTICAL BENEFIT ITEMS WHICH HAVE A BRAND PREMIUM AND THAT MAY BE SUBSTITUTED

The Schedule of Pharmaceutical Benefits shows differences in price between some alternative brands of the same drug product.

Manufacturers can develop generic equivalents and apply to have them listed on the PBS. In doing this, manufacturers need to ensure that they comply with the relevant legislation applicable to patents. These brands are clinically equivalent and must undergo the same strict quality controls. Although these brands are designed to act on the body in exactly the same way, they are usually cheaper than the originator brands.

italiano español

PETRONE GROUP
experts on pharmaceuticals and more

Search product(s): starting with

Choose the pricelists to search in:

ITA Human ITA Veterinary SPA Human IRE Human IRE Veterinary Intl.Generic

Choose which fields to search in:

Description Manufacturer Act.Ingred. ATC Code ATC Descrip. Notes

pharmaceutical products database

Also in another currency With a rate of Suggested discount Records per page

Home Search Pricelists Login

PLEASE NOTE: Results do not contain Irish products, whose pricelist is temporarily unavailable.

PLEASE NOTE: Irish pricelist is temporarily unavailable. Searches on Irish products will produce no results.

In this section of the site it is possible to search our product lists, including over 84,000 entries, belonging to the official pharmacopoeia of Italy and Spain.

Please note that, apart from these products, we are able to supply a large number of other items such as Parapharmaceuticals and Medical devices (CE Mark). Our sales department is at your disposal for any information you should need about these products.

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Data for International Price Comparisons

/Adatok nemzetközi ár összehasonlítás céljára/

For the purpose of international price comparison, the National Institute of Health Insurance Fund Management (NEAK) has published the following list of reimbursed drugs in Hungary, with prices reported in Euros. Due to the volatility of the HUF/EUR exchange rate, the calculated exchange rate is based on the average of the 72 months preceding the month of publication. Current exchange rates can cause differences that may not be realized in practice. The drug list is updated twice a year to reflect HUF and exchange adjusted price changes, in addition to publish newly reimbursed and delisted drugs. The prices are for information only. The actual Hungarian drug prices can differ from the published list.



July of 2021 - Data for International Price Comparisons

T.C. SAĞLIK BAKANLIĞI
TÜRKİYE İLAÇ VE İHBBİ CİHAZ KURULUMU

ANASAYFA KURUMSAL MEVZUAT BASIN FAALİYET ALANLARI İLETİŞİM

Referans Bazlı İlaç Fiyat Listesi

Gösterilecek Kayıt Miktarı: 10

Arama:

Adı	Değişiklik Tarihi	Geçerlilik Tarihi	Döküman
REFERANS BAZLI İLAÇ FİYAT LİSTESİ	21/05/2021	21/05/2021	XLSX
REFERANS BAZLI İLAÇ FİYAT LİSTESİ	12/05/2021	12/05/2021	XLSX

https://health-e.org.za/medicine-price-registry/

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Medicine Price Registry

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Παρασκευή, 28 Μαΐου 2021

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11/06/2018

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- Δελτία Τιμών ΜΗΣΥΦΑ
- Θετική Λίστα
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YA ΔΤΦ ΜΑΪΟΥ 2018-11062018.pdf
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A	Dry Eye (208)	Itching/Dry Skin (0)	R
ADHD (5)	Dry Skin (646)	K	Rabies (8)
Acne (364)	E	Kidney Disease/Stones (104)	Rheumatoid Arthritis (2)
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News	Company	Industry	API Price	Vitamins	Antibiotics	Others
Hongda to build Niacin project			06-28	Chloramphenicol reference prices of main prod...		06-28
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Tiger to build Vitamin C sodium project			06-25	Cefoperazone Sodium reference price		06-27
Hvatsou to expand Vitamin B5 capacity			06-24	Nicotinamids (Vitamin B3) reference price		06-27
NHU vitamin E project passed acceptance check			06-24	Folic acid (feed) reference price		06-26
Xinfa to build Vitamin C project			06-24	Vitamin B12 (Mecobalamin) reference price		06-26
Yishunying to build Vitamin B5 project			06-24	Vitamin B12 (feed) reference price		06-26
Shandong started rectification action for che...			06-24	Olesartan medoxomil reference export price		06-26

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API remark	Veterinary drug
Erythromycin sries quote price decreased	06-25 Tylosin main producer reference price
Weekly APIs market review (Jun 17-Jun 21, 201...	06-24 Oxytetracycline Hcl reference price
Antibiotics quoted prices from CPHI	06-21 Oxytetracycline base reference prices of main...
Market situation of vitamins	06-18 Apramycin Sulfate reference price
Market situation of antibiotic APIs	06-17 Gentamicin sulfate (CPV) reference price
Pregabalin global supply & demand chain	06-13 Florfenicol reference price
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