

Mohamed Ayad - Head of Middle East, Santen



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Mohamed Ayad, representing Santen as the Head of the Middle East, discusses the Japanese multinational firm's growing presence and strategic focus in the region. He shares insights into the challenges and opportunities within the eye health care and ophthalmology market, Santen's innovative approach to product offerings, and the company's commitment to addressing unmet patient needs. Ayad also highlights the importance of local partnerships and the role of Saudi Arabia in shaping the future of Santen's operations and market expansion across the region.

How would you describe Santen's market entry strategy and current priorities in the Middle East today?

Santen is a unique company dedicated to eye health, with a deep heritage, particularly in Japan, where Santen has a 130-year legacy of providing eye care and ophthalmology therapies to patients. In Saudi Arabia, however, Santen is a relatively new player, having brought patient therapies to the market for only a few years. In this early growth phase, we have established a strategic distribution partnership with Al Hamaed Medical Company (HMC) to provide people in Saudi Arabia access to innovative eye care treatments. As the footprint develops, we aim to transition to a full-fledged Santen branch. Santen's goal is to become the partner of choice for ophthalmologists in the Middle East by offering a comprehensive range of services and therapies that support both healthcare providers and patients.

What are the current dynamics and level of unmet needs within the eye care and ophthalmology segment in the Middle East?

Since eye diseases are not usually life-threatening, they are not prioritized by policymakers compared to other diseases like cancer or diabetes. However, they can still have a tremendous impact on the lives of patients, their families, and society. This is gaining recognition, as seen with the establishment of the National Prevention of Blindness Committee. Saudi Arabia was also among the first countries to sign the WHO's Comprehensive Eye Health Action Plan (2014-2019) to integrate eye care into health systems. However, there is still a need for greater awareness and advocacy in the region about eye diseases, their complications, and the impact they can have, including the potential for blindness if not diagnosed and addressed early.

Santen is committed to addressing these unmet needs in the region. Santen has a strong portfolio of innovative products, including treatments for rare diseases that are more prevalent in the Middle East due to the hot climate. For example, diseases like vernal keratoconjunctivitis, which causes a severe and recurrent allergic eye condition, are more common here than in Europe. Santen offers therapies that address those needs and make innovative treatments accessible to patients in the region.

Looking ahead, we are excited about the potential for future product launches that will further meet the needs of patients in the Middle East. Our focus on cutting-edge treatments, including therapies targeting myopia in children, addresses an unmet need in the region. Our plans to introduce an advanced product in myopia care to the Middle East offer a glimpse into the exciting future of ophthalmology care in this region.

How do you see the trajectory of the ophthalmology market? Is this a growing segment in Saudi Arabia?

The ophthalmology market in Saudi Arabia is growing steadily, and there is significant recognition of the importance of providing new treatments to patients. This commitment from the authorities is shown in the fast-tracking introduction of new medicines; therefore, we work closely with local authorities to introduce our services and therapies. The growth of the ophthalmology market in Saudi Arabia is driven by demographic factors, particularly the young population. In Europe, glaucoma is typically the leading segment in ophthalmology. In the Middle East, it ranks lower,

typically third or fourth, behind conditions such as dry eye and cataracts. Additionally, lifestyle changes, such as increased time on screens and limited time outdoors due to the hot climate, mean that cases of myopia, especially in children, are on the rise. These unique dynamics highlight the distinct need for a strong level of ophthalmology care in the market.

How do you position Santen in the Saudi market, and how strong do you feel the brand awareness and market share are today?

Santen is still relatively small compared to the overall market size in the Saudi market, especially from a sales perspective. This time last year, our portfolio in the region was relatively limited, focused on treatments for dry eye and surgical glaucoma. Over the past year, we have expanded our offerings to include solutions for inflammatory eye conditions, cataract surgery, and glaucoma, with additional offerings to follow.

2025 is a pivotal year for Santen, with three major product launches and significant growth potential. Saudi Arabia is a key driver in this region. We are already experiencing strong growth and moving towards our goal of becoming a leader in this segment.

What would you say are the key factors driving Santen's market share in Saudi Arabia's ophthalmology sector?

Several factors are driving Santen's market share in Saudi Arabia's ophthalmology sector, with product innovation being one of the key drivers. We focus on differentiation by providing novel solutions and technologies, for example, a cationic emulsion technology that helps people manage their VKC (vernal keratoconjunctivitis).

In addition to innovation, we leverage the deep expertise of our team and Santen's 130 years of history in innovative eye care solutions. Our team members, including key account managers, brand managers, medical science liaisons, and country managers, have extensive experience in the ophthalmology field. Most have backgrounds with ophthalmology-focused companies, providing us with valuable industry know-how. This combination of innovative products and an experienced team is pivotal to our growth and success in the Saudi market.

How do you view the role of specialized centers in driving healthcare advancement in Saudi Arabia today? How might the country's ongoing healthcare transformation impact the adoption of niche therapeutics?

Saudi Arabia's ongoing healthcare transformation is driving the adoption of new care models and fostering investment across both the public and private sectors. This trend is supported by venture funds and new incentives for private sector growth. As the country increasingly prioritizes value-based healthcare, we position ourselves by offering differentiated products that are well-recognized in studies and textbooks. This helps Santen stand out in the ophthalmology field and demonstrates the value of our products to patients.

We also partner with the Saudi Ophthalmology Society and have been actively involved in their congresses over the past three years, raising awareness about eye health. Through these partnerships and our involvement in initiatives such as continuous medical education, we aim to support the development of well-equipped and qualified practitioners. In the future, we aim to explore collaboration with other stakeholders, such as the Ministries of Health and Education, to help integrate eye health into broader health programs and drive prevention, earlier diagnosis, and increased access to treatments.

When differentiating between regulatory approval versus reimbursement, how would you describe the process for securing reimbursement for Santen's products in Saudi Arabia?

In Saudi Arabia, regulatory approvals and pricing are processed simultaneously, following the rules and regulations set by the Saudi Food and Drug Authority (SFDA).

Meanwhile, the reimbursement process differs from that in Europe. In the private market, insurance policies cover products under the Council of Health Insurance (CHI), which maintains a formulary primarily based on products registered by the SFDA and labeled for specific diseases.

In the governmental sector, products are mainly covered through the National Unified Procurement Company (NUPCO), which has its own formulary and supplies products to most government hospitals. However, in some cases, products that are not yet included in the NUPCO formulary may still be procured through hospital-initiated direct purchase orders—either for urgent cases or under specific conditions. This reflects Saudi Arabia's flexible, patient-centric approach and its commitment to providing the highest level of care.

The NUPCO formulary covers most of the governmental sector, and inclusion follows a step-by-step process. New submissions are evaluated based on patient needs and recommendations from various stakeholders within the committee.

Regarding pricing, SFDA regulations require consideration of several factors, including the product's price in its country of origin, price comparisons with a list of 16 reference countries, and the availability of alternative treatments or standard-of-care options.

With three new assets in your pipeline, do you anticipate needing to acquire new skills or expand your team to handle these advancements?

I expect to scale up our operations and enhance the team's skills to manage these new regional launches. To continue our robust growth, we plan to increase our presence in Saudi Arabia and establish new functions in the near future.

We are also focusing on the development of local talent. In a competitive environment, it's worth taking the time to find the right fit – someone who aligns with our goals and culture. This approach helps avoid losing time, investment, and resources if the candidate leaves after a short period of time. Finding the right person is essential for the long-term success of any organization.

Given the robust and sophisticated pipeline at Santen, along with its partnership and marketing model, what role do you see the Saudi Arabian market playing in future product launches?

Saudi Arabia will undoubtedly continue to play a key role in our future product launches. Despite Saudi Arabia being considered a new market for us compared to larger European markets like the Nordics and Germany, it is still prioritized among the top three markets for services and launches. We recognize the potential of Saudi Arabia and how it aligns with our growth strategy.

Looking ahead, we anticipate that Saudi Arabia will remain among the top ten markets for Santen over the next decade, potentially even ranking in the top five. The Kingdom offers a strong infrastructure, and our product portfolio is well-suited to meet the needs of the ophthalmology market.

To achieve this success, product selection is crucial for us. We focus on offering unique products with innovative mechanisms of action and technologies that ultimately benefit both patients and

healthcare professionals (HCPs). Our goal is to provide the right solutions to address unmet needs in the ophthalmology field. With new products targeting various segments in our pipeline, Saudi Arabia will undoubtedly remain a key market for Santen.

Do you have any closing thoughts or a message to share on behalf of Santen in the Middle East?

Santen is dedicated to enhancing the lives of patients in the Middle East through our innovative and high-quality ophthalmic solutions. As we expand our presence in the region, we remain committed to our mission of providing advanced therapies, while partnering with healthcare professionals and other stakeholders to meet the evolving needs of patients. Our commitment to advancing eye health and cultivating strategic partnerships reflects our long-term dedication to improving the quality of life for individuals and communities throughout the Middle East.

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