To provide healthcare organizations with innovative therapeutic solutions in niche and rare genetic disease areas, market access strategies and sustainable commercial solutions, while improving patient care and quality of life in the Middle East and North Africa.

“We strive to be the partner of choice for multinational healthcare and pharmaceutical companies expanding into the Middle East and North Africa region.

We aim to consistently differentiate ourselves by serving all of our stakeholders through evidence based medicine.”

Our Vision

Mission Statement

Core Values

Patient Care
We are dedicated to patient care and quality of life

Innovation
We offer unique and sustainable solutions

Accountability
We are committed, reliable and results focused

Integrity
We act honestly, with inclusivity and respect

Teamwork
We are positive, professional and transparent
Business Overview
Creating a new standard of partnership and pharma leadership in MENA

Genpharm is a **pharmaceutical market access company** focused on niche therapeutics and diagnostics for rare disease and specialty care.

- **Rare Disease**
- **CNS**
- **Women’s Health**
- **Specialty Care**
- **Respiratory**

- It provides **fast and sustainable market access into the MENA** (Middle East & North Africa) region to its strategic partners.
- It acts as the **exclusive regional commercial partner** for pharmaceutical companies in MENA.
- Its **support functions** include Medical, PV, Regulatory, Quality and logistics.
- It provides strategic advise on **Business Development opportunities and pathways** for companies evaluating their entry into MENA.

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**Geographical Presence**

- Algeria
- Libya
- Egypt
- Morocco
- Tunisia
- Syria
- Iraq
- Iran
- Kuwait
- Bahrain
- Qatar
- UAE (Dubai, Headquarters)
- Saudi Arabia
- Jordan
- Yemen
- Lebanon
- Oman
- Turkey

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Experienced Management Team

**Mr. Karim Smaira** Co-founder & CEO

- **22 years of regional experience in Senior Executive Pharma roles**
  - Launched and managed operations for several Biotech and rare disease products including (go to market strategies & funding)
  - Wide expertise and network in emerging markets, in particular in the Middle East & North Africa Region as well as in South East Europe and Russia.
  - Active member of several industry associations and business councils
  - Member of the Diplomatic Circle in Geneva and Public speaker on industry matters

**Mr. Kamel Ghammachi** Co-founder & Chairman

- **33 years of regional Senior Executive Pharma roles within MNCs & Distributors**
  - Established and Managed several regional offices in MENA
  - Pharmaceutical entrepreneur with several start ups in the region, active member of several industry associations and business councils
  - Honored by Rotary several times as Paul Harris Fellow for meeting outstanding personal, professional standards and charitable work.
  - Several awards recognizing successful businesses in MENA
Executive Board

Mr. Karim Smaira
CEO
- 22 years of regional experience in Senior Executive roles
- Launched and managed operations for several Biotech and rare disease products
- Wide expertise and network in emerging markets, in particular in the MENA region, South East Europe and Russia.
- Active member of several industry associations and business councils

Mr. Kamel Ghammachi
Chairman
- 33 years of regional Pharma experience in Senior Executive roles within MNCs & Distributors.
- Former Managing Director Examon MENA.
- Former Managing Director Farbro Group.
- Former General Manager Janssen Cilag ME I.
- Honored by Rotary several times as Paul Harris Fellow for meeting outstanding personal, professional standards and charitable work.

Mr. Elmar Schnee
Chairman of Santhera Pharmaceuticals
- Executive Board Member of Stallergenes S.A
- Non-executive Director of Jazz Pharmaceuticals
- Former MD Merck Santé s.a.s, Regular Member of the Executive Board and General Partner of Merck KGaA
- Held senior positions in Strategy & BD at UCB, Sanofi & others

Dr. Samy Ashkar
Former CEO of Sterling Natural Science
- Former CSO Sopherion Therapeutics
- Former Faculty member Harvard Medical School and The Children’s Hospital-Boston.
- Author of several scientific publications in prestigious journals including Science and JBC
- Holder of multiple international patents as a result of his scientific research work

Mr. Rick Pudner
Former CEO of Emirates NBD; the largest regional bank by Assets
- Board Member of Galadari Group
- Board director of Bukhatir Group
- Former Board Director Emirates Islamic Bank
- Former Head of Corporate Banking HSBC Middle East; President and CEO of HSBC Korea
- Director in Emirates Fund Managers (Jersey) Limited, and a founder member of Visa CEMEA Advisory Forum

Mr. Karim Smaira
Mr. Kamel Ghammachi
Mr. Elmar Schnee
Dr. Samy Ashkar
Mr. Rick Pudner
The region presents a $40+ Billion opportunity....
..... and growing to nearly $70 Billion by 2019
MENA Macro Background

MENA population growth to outpace other economic groups

Population Growth (CAGR 2017-2022)

- MENA Countries: 1.9%
- Developing Countries: 0.9%
- Developed Countries: 0.6%

Population, 2017 (mn)

- MENA Total: 408
- Top 5 European Countries: 321
- North America: 362

GDP per capita €, 2017

- Qatar: 52,336
- UAE: 32,141
- Kuwait: 23,440
- Bahrain: 21,661
- KSA: 18,036
- Oman: 14,980
- Lebanon: 10,055
- Jordan: 4,886
- Iran: 4,520
- Iraq: 4,267
- MENA Total: 11,986

Emerging Economies

- Russia: 8,820
- Brazil: 8,623
- China: 7,387
- India: 1,594

Developed Economies

- US: 51,203
- Germany: 38,026
- UK: 33,432
- World: 9,252

Source: IMF Data
Note: Developing Countries - China, India, Brazil & Russia; Developed Countries - US, Germany, UK & Canada; North America - US & Canada; KSA stands for Saudi Arabia; Top 5 European Countries – UK, Germany, France, Italy, Spain; MENA Countries – Algeria, Bahrain, Djibouti, Egypt, Iran, Iraq, Jordan, Kuwait, Lebanon, Libya, Mauritania, Morocco, Oman, Qatar, Saudi Arabia, Tunisia, UAE & Yemen; Conversion rate used across slides: 1 US$ = € 0.860615
Strong MENA Macro Background
Strong GDP growth provides an upside to healthcare spend

Average GDP Growth (2017-2022)

<table>
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<tr>
<th>Country</th>
<th>MENA</th>
<th>India</th>
<th>China</th>
<th>United States</th>
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</thead>
<tbody>
<tr>
<td>Health expenditure per capita:</td>
<td>€ 1,895</td>
<td>€ 267</td>
<td>€ 731</td>
<td>€ 9,403</td>
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<tr>
<td>Health expenditure % of GDP:</td>
<td>4.1%</td>
<td>4.7%</td>
<td>5.5%</td>
<td>17.1%</td>
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</table>

Source: IMF, World Bank
Note: (1) MENA comprises Arab World and Iran; Health Expenditure - Data is for 2014, Healthcare expenditure per capita PPP (constant 2011 international $ converted to Euro)
Focused on Specialty and Orphan Segment
Genpharm is purposely positioned in the innovative brands market

**Business Model Characteristics for different product type**

- **Commodity**
  - High Volume & Low Margin
  - Tight Control of Cost
  - Focus on Supply Chain
  - Tenders and Purchasing professionals are the key stakeholders
  - Promote price and service
  - Seek scale to gain cost efficiencies and market power

- **Differentiated**
  - Lower Volume & High Margin
  - Emphasis on Quality
  - Focus across a complex set of stakeholders
  - Promote efficacy, safety, tolerability
  - Seek differentiation to drive demand

**MENA Market Trends for Orphan and Rare Disease Drugs**

- Genetic diseases are prominent due to higher consanguinity rates
- Lack of epidemiological data, scientific publication and patient registries
- Appetite for innovation in diagnosis and disease management
- Early Market access programs are allowed particularly in GCC but…
- … Government engaged in cost control measures, limiting the scope of Name Patient programs
- Improved regulatory environment for faster approval of rare and orphan disease drugs
- Patient Advocacy groups are in their infancy and have limited impact
- International referencing pricing and benchmark with country of origin
Current Portfolio

CONSULTANCY
- Identify business potential
- Recommend appropriate business & operations models
- Recommend strategy & organization
- Formulate adapted market access strategies

SPECIALTY PHARMA
- Registration
- Market Access, Pricing & Reimbursement
- Medical & PV services
- Marketing, Promotion & sales force effectiveness
- Fast track market penetration through NPS
- Importation & distribution

GENPHARM Services

Current Partners

Rare Disease
- PTC
- ultragene
- Sarepta
- Biogen
- Santnera

Women’s Health
- Life1 codex
- Richter Gedeon
- Progenity

CNS
- AB-Biotics
- Sintetica

Respiratory
- Stallergenes
- Novartis

Specialty Care
- Admedus

Sustainable market access solutions that provide long-term value
Genpharm Organogram

*All Business Units and Support Functions report to both Managing Partners*
Delivering new drugs to MENA markets
Genpharm masters product registration and commercialization across MENA

**Registration: Background and Insights**

- Pre-registration market access on the basis of FDA/EMA approvals
- Registration friendly environment in GCC - shortened timelines
- Possibility for centralized registration procedure & fast track
- Pricing Harmonization & International referencing system
- Government coverage for nationals and insurance privatization trend

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- Slow Reg. ~3 years
- Avg. ~15-18months
- Rapid Reg ~12months

**Commercial and Supply chain: Channels and Networks**

- Logistic Hub and Distribution in the US and UK through certified 3PL Aramex Healthcare
- Direct management of a network of sub-distributors chosen over more than 40 years of experience.
- Established Relationship with Major Hospitals and Institutions across MENA.
- Strong expertise and mastering the Name Patient process and Market Access solutions.
- Strong KOL management in specialty and rare disease areas.
- Active role in Pharma and healthcare forums in the region as speakers and experts.
- Established reputation of Genpharm management in the Pharma industry.

- Pre-registration market access on the basis of FDA/EMA approvals
- Registration friendly environment in GCC - shortened timelines
- Possibility for centralized registration procedure & fast track
- Pricing Harmonization & International referencing system
- Government coverage for nationals and insurance privatization trend
Holistic Market Approach
Working with all Market Access stakeholders

- Physicians
- Scientific Societies
- Government Programs
- Purchasers
- Health Insurance
- Hospital Pharmacies
- Distributors
- Patient Associations
Targeted and Focused Positioning
Rare Disease Expertise & Focus

- The rare disease drugs are highly priced due to their research and development cost. Customers are typically government hospitals and similar institutions with a substantial budget for their patients.

- Innovative products for unmet medical needs are given fast approval and reimbursement pathway

- Robust local expertise & knowledge of the local processes

- Existing network with key decision maker centers and stakeholders markets further helps to access regional markets and help companies with fast track registrations

- Genpharm operates in the niche, rare disease/Orphan Drug markets where the number of patients and prescribing physicians is limited

- Genpharm manages all stakeholders including Physicians, Patient groups, Payers and Distributors

- Need of a highly competent, evidence based selling and promotion approach through a limited number of KAMs/MSLs

- For unmet medical needs and specialty therapeutic, products can be purchased on a Name Patient Sales basis prior to registration.

- Fast track market access and market penetration. Early sales upside

- High Value Products

- Institutional Customers

- Limited Number Of Prescribers / Physicians

- Fast track Registrations

- Named Patient Sales

- Genpharm manages all stakeholders including Physicians, Patient groups, Payers and Distributors

- Need of a highly competent, evidence based selling and promotion approach through a limited number of KAMs/MSLs

- For unmet medical needs and specialty therapeutic, products can be purchased on a Name Patient Sales basis prior to registration.

- Fast track market access and market penetration. Early sales upside
Eligible Genpharm employees are given Stock Options;
- The right to buy shares at a predetermined price over a period of time.

Management aims to retain and reward the most performing staff.

Attract the best talent in the market.

Create an accountable workforce through selected ownership.

Ensure a long-term commitment to Genpharm.

- First Employee Granted options on shares April 2018
2016-2018 “MEA Business” Award: Best Pharmaceutical Marketing & Market Access Company in MEA

Best Pharmaceutical Market Access Company - United Arab Emirates

Genpharm Services is an innovative market access regional pharmaceutical company, focused on the segment of rare and genetic disease, supporting both patients and physicians by raising disease awareness, establishing early diagnosis and identifying treatments for these diseases that are approved by the highest regulatory authorities such as the FDA and EMA. We profile the firm to provide a fascinating overview of the vital services it offers.

Genpharm are a specialty pharmaceutical marketing and advisory company, providing its strategic partners with fast and sustainable market access into the MENA region. Founders and Managing Partners Karim Smaira and Kamel Ghannachi outline how the firm has come to achieve its current success.

Genpharm are a market access pharmaceutical company focused on innovative and orphan drugs for the specialty and rare disease areas. Karim provides greater detail on the firm’s service offering and how it has carved a niche for itself within the pharmaceutical marketing industry.

“Genpharm, we represent multinational pharma and biotech manufacturers that would like to expand into the Middle East and North Africa (MENA) region. It focuses mainly on rare diseases, genetic diseases, biological products and innovative diagnostics. The firm is committed to educating healthcare professionals, patients and caregivers on the disease and the burden of these diseases. Most of the genetic conditions are rare and they can cause social stigma and isolation. Therefore, it is important that the mindset changes and society realizes that despite these disabilities, many patients could live longer and enjoy a better quality of life. The key stakeholders are better equipped to how to care for these cases.

“Being in the area of rare disease, one should not lose focus on the patients and their families. They are at the core of everything we do. We are driven by our values that are patient-centric, innovation, integrity, accountability and teamwork. Our commitment to living our values ensures the high standards we hold ourselves against.”
The MENA Pharma Market: An Untapped Opportunity

Source: Life Science Leader

By Kenten Smirnov, Founder and CEO, Genpharm

The total size of the MENA (Middle East and North Africa) pharmaceutical market is estimated at $86 billion, which is only 2 percent of global pharmaceutical sales, but it has one of the highest growth rates (9.6% to 12% per year), based on info from IMS Health in emerging markets.

That growth rate is driven by the significant rise of chronic diseases — diabetes affecting 13 percent of the nationals in the Gulf Cooperation Council (GCC), cardiovascular, cancer, respiratory — and due to lifestyle changes and better education. For example, lifestyle changes are leading to an increase in chronic and lifestyle diseases (e.g., lack of exercise and bad diet leading to diabetes and hypertension, smoking leading to COPD and lung cancer).

Better education and increased health and medical knowledge is making the general population more demanding when it comes to the quality and reach of medical services and access to drugs. Furthermore, as a result of cultural reasons such as consanguinity rates, the incidence of genetic diseases is significantly high, creating opportunities for companies focused on producing drugs for orphan and rare diseases. Governments, particularly those of Egypt, Algeria, Iran, Saudi Arabia, Jordan, and the UAE (United Arab Emirates), have recently
Committed to the Rare Disease Community!
Your Gateway to the Middle East and North Africa Pharmaceutical World

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