

## CASE STUDY

Healthcare

# Market assessment study of IV solutions and injectables in the UAE



## About the client

Our client is a leading UAE-based pharma company specializing in IV solutions for kidney dialysis, life-saving IV fluids, large-volume parenteral, water for irrigation, and therapeutic products. It serves the United Arab Emirates and other Middle East markets with a portfolio of more than 65 products.



Founded in  
**1994**



Acquired in  
**2021**



Employees  
**36**

## Objective and challenges

The firm sought to conduct a comprehensive market assessment study that focused on drug delivery systems such as IV solutions and injectables in the UAE. The study targeted several segments, including general and electrolytes IV, antibiotic IV, dialysis fluids, IV fluid bags, and premixed bags.

Additionally, the client was planning to acquire another IV solution provider, and Netscribes assessed the future sales plan of the target company to evaluate the synergies.

Moreover, the client also wanted us to do portfolio gap analysis to assess the need for diversification and leverage their existing manufacturing line.

## Approach and solution

The engagement involved gathering relevant information from various sources and processing it to generate insights for the client. Netscribes also used data shared by the client during the kick-off call and throughout the project duration.

During the engagement, our team of experts analyzed the market potential of the target segments, major competition, import-export landscape, procurement aspect, and product feedback.

We utilized both primary and secondary research methods to perform the market assessment study.

For secondary research, Netscribes used various sources, including:



Industry publications



Company websites and annual reports



Investors presentations



Data shared by the client (including IQVIA data)



Government websites and annual reports



NCBI journals



News articles from ArabNews and Khaleej Times

The purpose of this approach was to gain a deeper understanding of the market and indication landscape in the targeted country, including competitive intelligence.

As a part of the primary research, Netscribes conducted 42 in-depth interviews via CATI (Computer-Assisted Telephone Interviewing) to obtain responses from the target groups.

- A robust desk research information was used to assist in devising the questionnaire, which comprised qualitative and quantitative questions.
- After developing the questionnaire, a survey program was carried out, with a total of 42 interviews conducted across the UAE as indicated in the scope.
- The length of each interview varied from 30 to 45 minutes, depending on the respondent.

The target groups included:

- Experienced procurement professionals
- Physicians, nurses, and allied healthcare staff from hospitals and clinics
- Distributors, pharmacies, and manufacturers
- Industry experts

## Results delivered

Analysts and experts were involved in studying the psychometric data and plot to provide actionable insights about:



### Market understanding for each product segment

- Key players and their market share
- Market composition by customer type (government vs. private)
- Evolving product dynamics
- Reimbursement scenario
- Pricing trends
- Expected sales (volume and value)



### Export opportunity

- IV solutions and injectables export opportunity from the UAE to target countries including Saudi Arabia, Kuwait, Oman, Sudan, Libya, Bahrain, and Jordan



### Need-gap analysis

- Covering the requirement of general IV solutions
- Solutions against antibiotic-resistant bacteria
- Enhanced safety profile of paracetamol IV in patients with cardiovascular and renal issues
- Availability of IV solutions
- Increasing the shelf-life of pre-mixed antibiotics



### Buy-side due diligence

- Buy-side due diligence
- Target assessment -
  - Private vs. tender business growth
  - Diversification and its impact
  - Factory downtime for facility upgrade
  - Continued focus on local dominance and price-effective products
  - Potential multi-million opportunity in pre-mixed bags



### Distribution and procurement landscape

- Brand approval process
- Unmet needs
- Profile assessment of new products
- Expected switching behavior from current treatment options to the new products
- Expectations, challenges, insurance coverage, etc.



### Portfolio gap analysis

Factors such as extreme weather conditions, widespread occupational pollution, demand for low-cost generic products, increase in patient burden, unsaturated market, high and fast-growing markets, low entry-barriers, OTC usage (for ophthalmic products) facilitated in identification of respiratory (combination therapies such as corticosteroid with long-acting beta agonist) and ophthalmic therapeutic (eye lubricants/artificial tears and antiglaucoma eye drops) areas as potential segments for diversification



## Result and benefit

Equipped with our holistic research, the client gained a comprehensive understanding of the target product segment and the insights helped to its plan in an efficient manner. The buy-side analysis helped the client save USD 5 Mn on their deal.

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