

# Healthcare Investments Opportunities in KSA

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# Saudi Healthcare Market



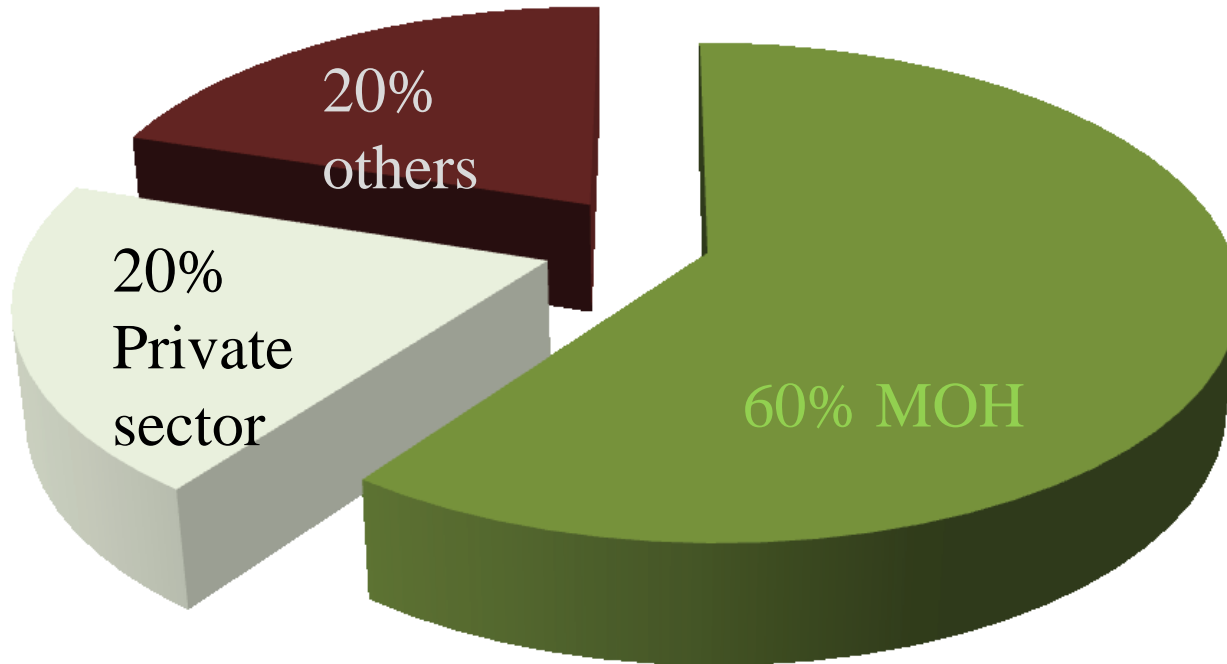
- With a landmass bigger than Western Europe and a population of approximately 28 million, of which 7 million are expatriates, 60% of Saudis under the age of 20 the Kingdom of Saudi Arabia (KSA) is the Arab world's largest Healthcare market





- Global Responsibility as Custodian of the two Holy Mosques
- Multiple Sectors who provide comprehensive health care
- MOH provides 60% of care through 20, 300+ Hospitals, 2000+ Primary Health Care Centers
- 40% of Health Services are provided through other sectors, we often serve the same patients

# Health Care Provided



60% MOH 20% Private sector 20% others

## Population

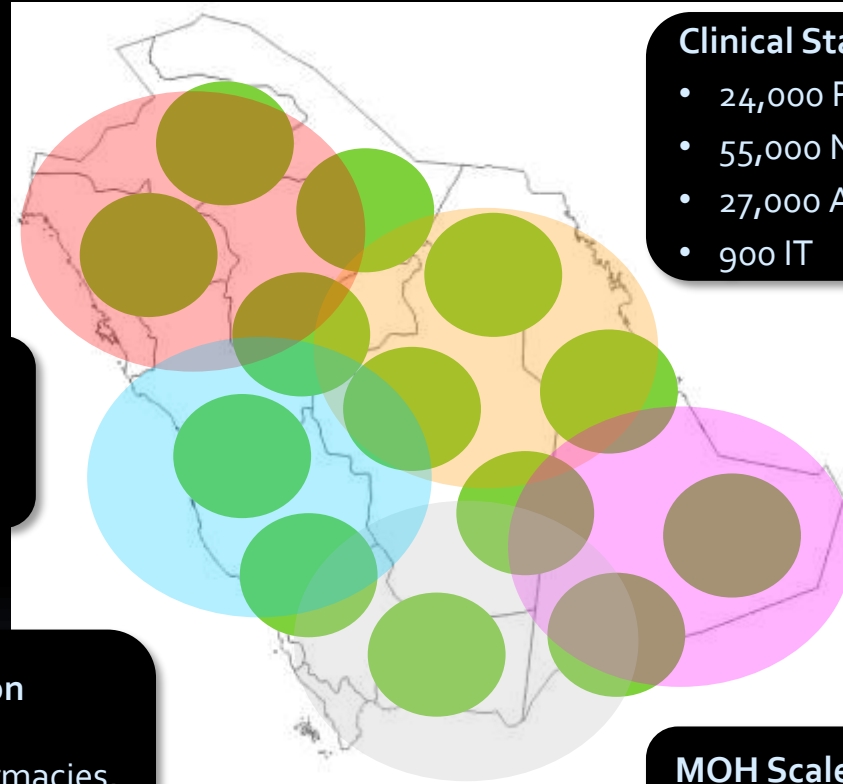
- Over 28,000,000

## Geography

- Urban, Peripheral, Remote

## MOH Healthcare Organization

- 13 Health Regions
- PHCs, Hospitals, Labs, Pharmacies, and Allied Health
- 5 Health Zones



## Clinical Staff

- 24,000 Physicians (80% Non- Saudi)
- 55,000 Nurses (60% Non- Saudi)
- 27,000 Allied Health
- 900 IT

## MOH Scale

- PHCs – over 3000
- Hospitals – over 300

# Population and Lifestyle diseases

- . Annual Growth Rate of 3.15 percent since 2004
- In 2008, Saudis had a life expectancy of 73 years at birth ( 9% than 1988.WHO)
- epidemiological profile of the Kingdom includes high incidences of obesity, hypertension and diabetes



# Health of the Nation

- Saudis will become older. The percentage of the population over 60 is rising, and is expected to more than double by 2020. By 2020, the number of old people is expected to grow from approximately 1 million (4 percent of the population) to roughly 2.5 million (7 percent of the population). At the same time, as incomes increase, Saudis are likely to spend an increasing amount of money on healthcare treatments, such as leading-edge therapies.



- Diabetes has been the leading cause of cardiovascular disease, kidney failures and amputations. The complications caused by these diseases will increase long-term costs, further burdening an already over-stretched health care system



- Saudi Diabetes & Endocrine Association (SDEA) in 2010, over 70 percent of the Saudi population is alarmingly obese.



# Health care Status

- • According to senior officials at MOH the current healthcare system is covering only 60% of the nation's need



# What are the opportunities ?

- The Saudi government continues to invest heavily in health infrastructure development. In the 2011 budget an amount of 84.7 billionSR (£14.4 billion) has been earmarked for its healthcare and social welfare services



# New Projects

- New projects within MOH will include the building of 12 new hospitals, expanding existing facilities and the continuation of building 700 new primary care centres throughout the Kingdom.
- The Higher Education Ministry has also announced plans to establish medical colleges and hospitals at all of the Kingdom's 24 government universities



# New Projects

- According to MOH sources 50 licences has been issued to private sector to build new 50 hospitals

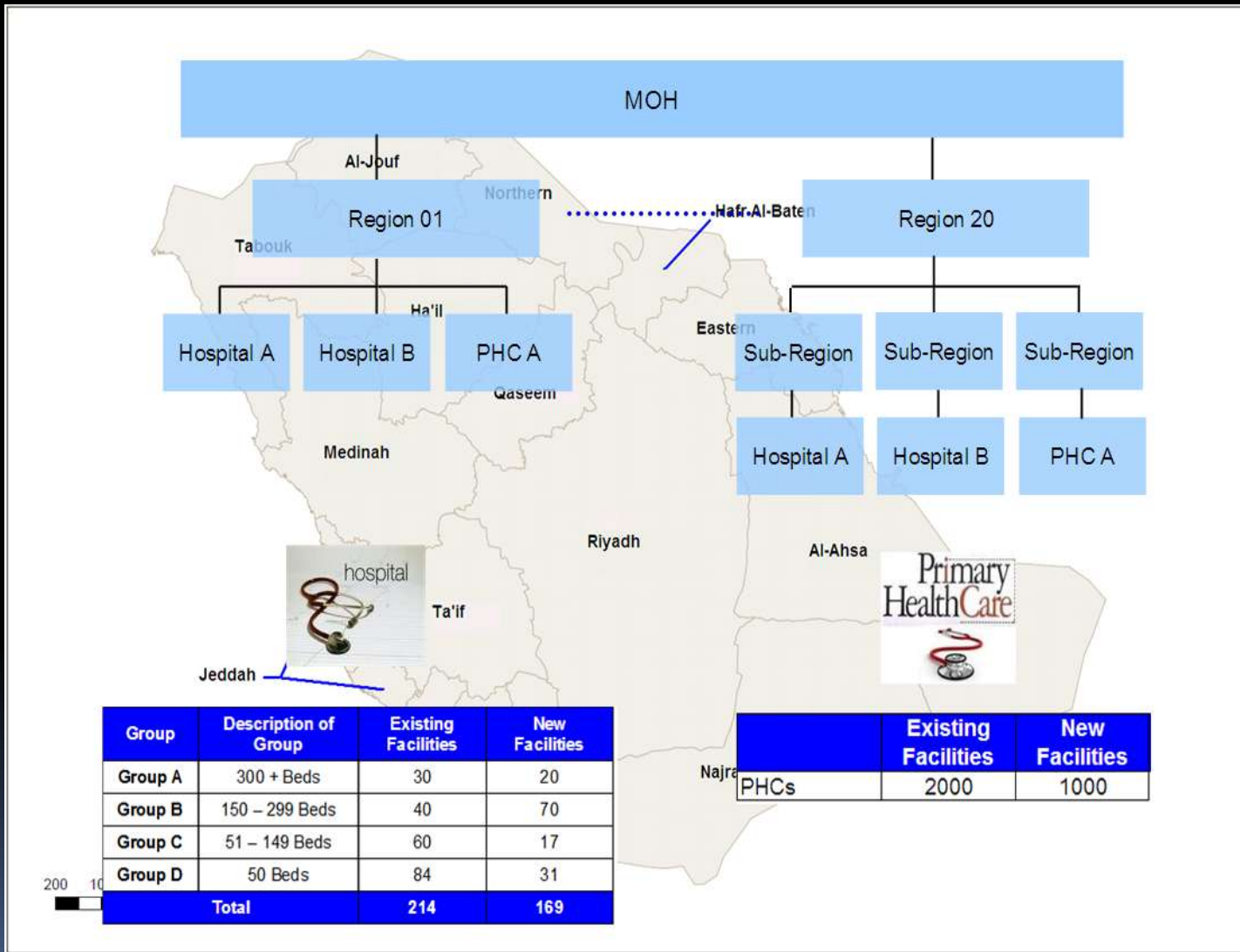


# More Investment Opportunities

- According to market sources, imported pharmaceuticals account for around 82 percent of Saudi pharmaceutical market worth approx. £3.1 billion in 2010,
- Market sources valued the medical equipment and supplies market in the Kingdom at £900 million in 2010,



# Hospital Information System



1.5 Billion SR (245 Million Pounds)

# HE DR Abdullah Alrabeea Vision for Cooperation

1. HOSPITAL  
MANAGEMENT &  
OPERATION ( FROM 100 -  
500 BEDS)
2. RENOVATION &  
BUILDING
3. RECRUITMENT
4. PHARMACEUTICAL  
INDUSTRIES ( PARTNERSHIP )
5. RESEARCH
6. TRAINING IN ALL  
MEDICAL FIELDS

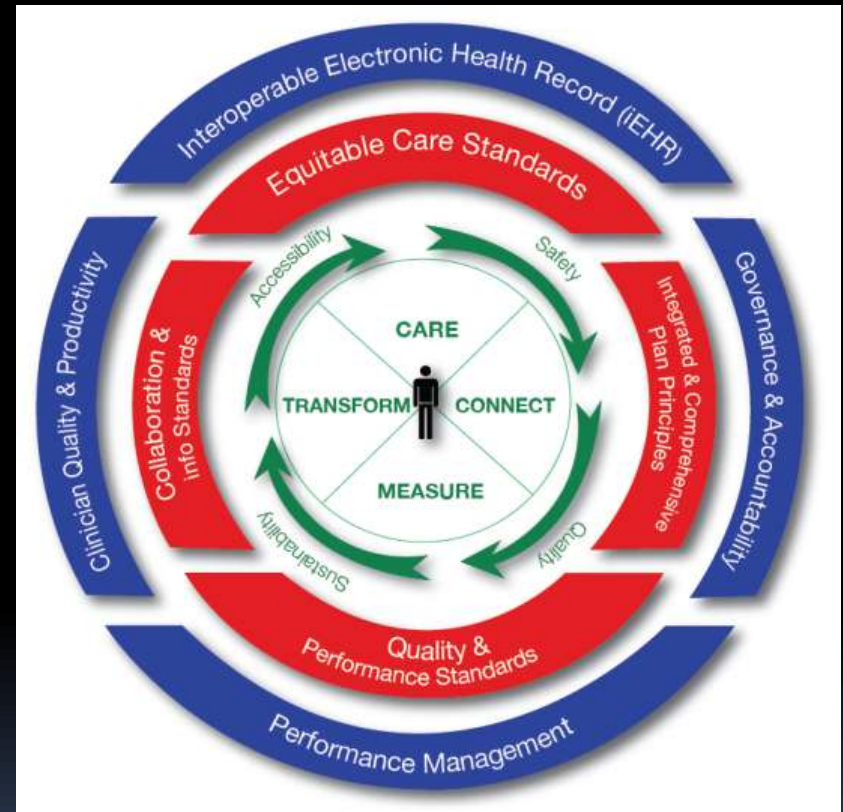


MOU Signed in London April 2011

# Where are the opportunities?

## In 5 Years Time:

- More than 200 new hospitals
- 1000 Primary Health Care Centres
- 100 Rehabilitation centres
- Insurance market
- Pharma. and medical device markets



# How To Enter the Saudi Market?

