

Healthcare & Life Sciences

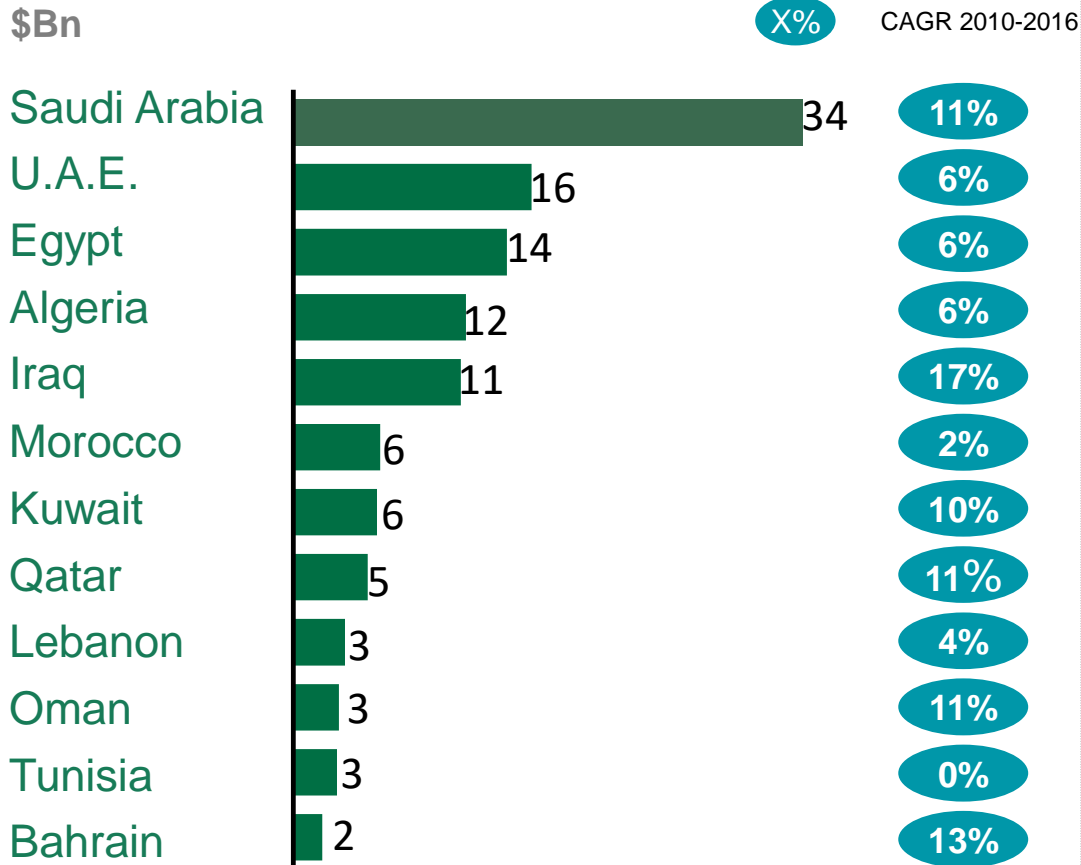
Saudi Arabia Beyond Oil

INVEST
SAUDI 

The Saudi health sector is the largest in MENA and has significant infrastructure

Health sector expenditure in MENA¹

Key health sector infrastructure metrics



Healthcare professionals

90K



Physicians

106K



Allied health personnel

180K



Nurses

Healthcare facilities

470+



Hospitals

71K



Hospital beds

5K



Clinics

1 Middle east and North Africa

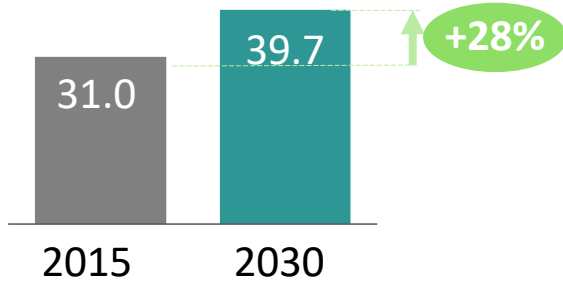
Note: All data as of 2016

Going forward, health sector demand will increase significantly

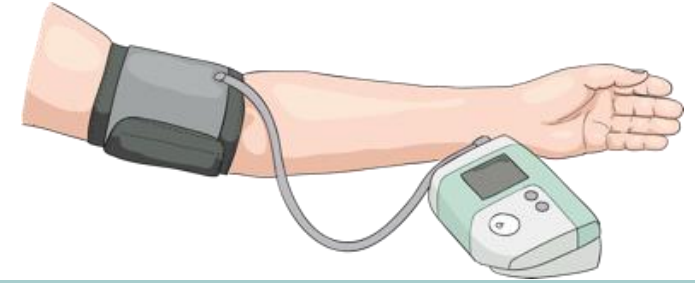
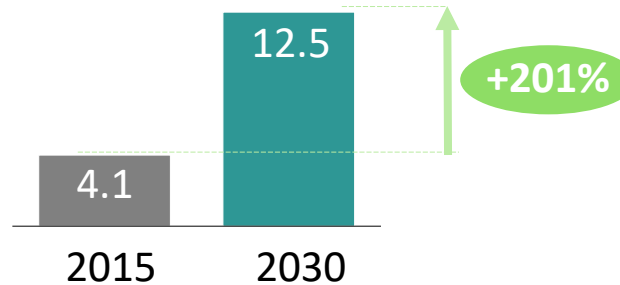
Drivers of health sector demand



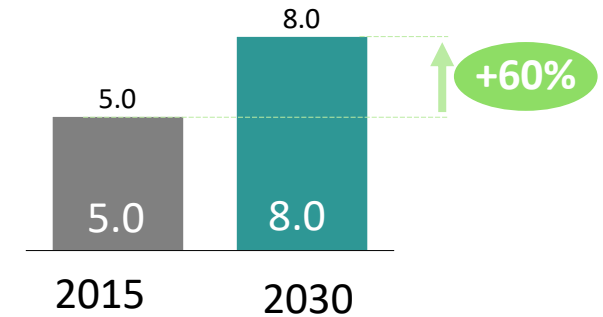
Growing population,
Millions



Ageing population,
Above 50 years of age, Millions



Rising prevalence of chronic
conditions, Millions



Obesity | 1 in 3 adults | 1 in 4 children

Health sector supply will be focused on the following segments

Private Sector Participation (PSP) Program aims to increase the share of private sector in healthcare delivery with the usage of public-private-partnership (PPP) models



Primary Care



Hospital Commissioning



Medical City



Rehabilitation



Long-Term Care



Laboratory



Radiology

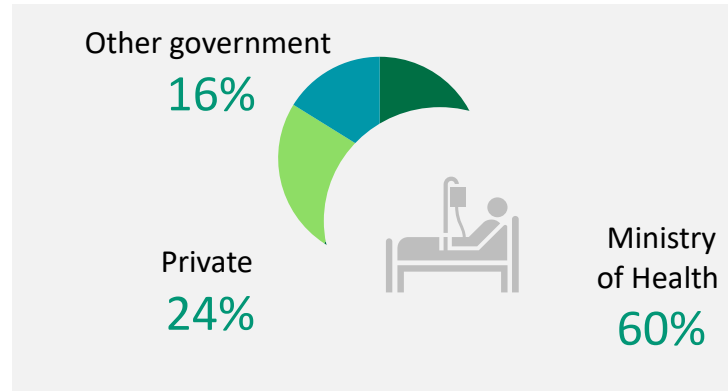


Home Care

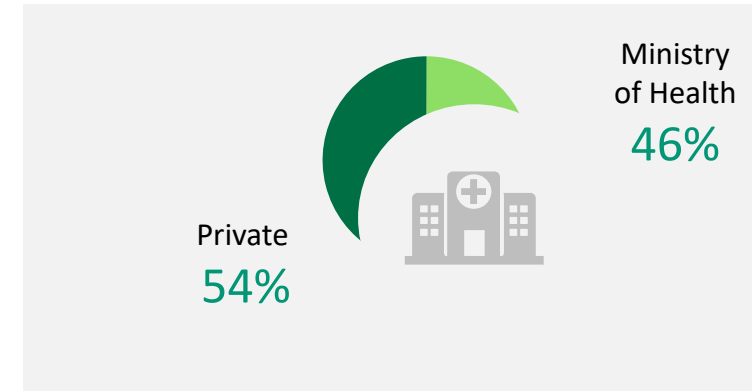
Current healthcare System is highly dependent on government providers and imports



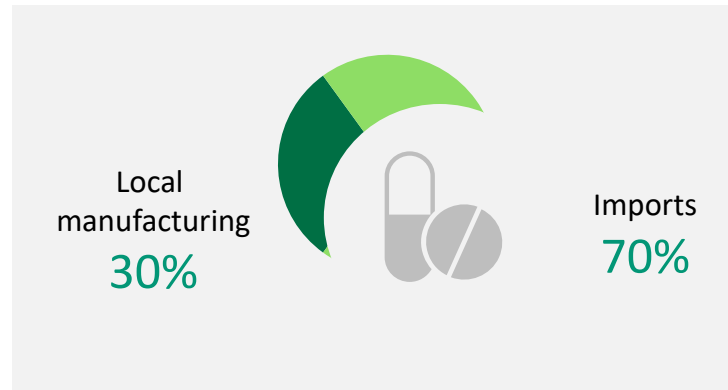
Hospital beds



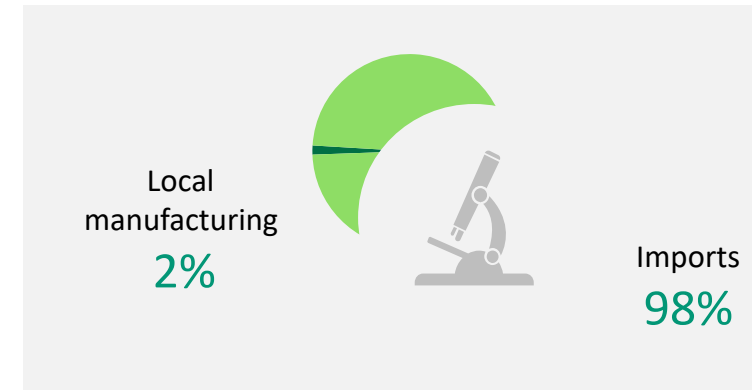
Clinics



Pharmaceuticals



Medical devices



In the new healthcare strategy, private sector has a big role

7 Themes of the new health sector strategy

Digital Healthcare

Provide digital tools for patient self-service, prevention, unified patient records and workforce efficiency

Human capital

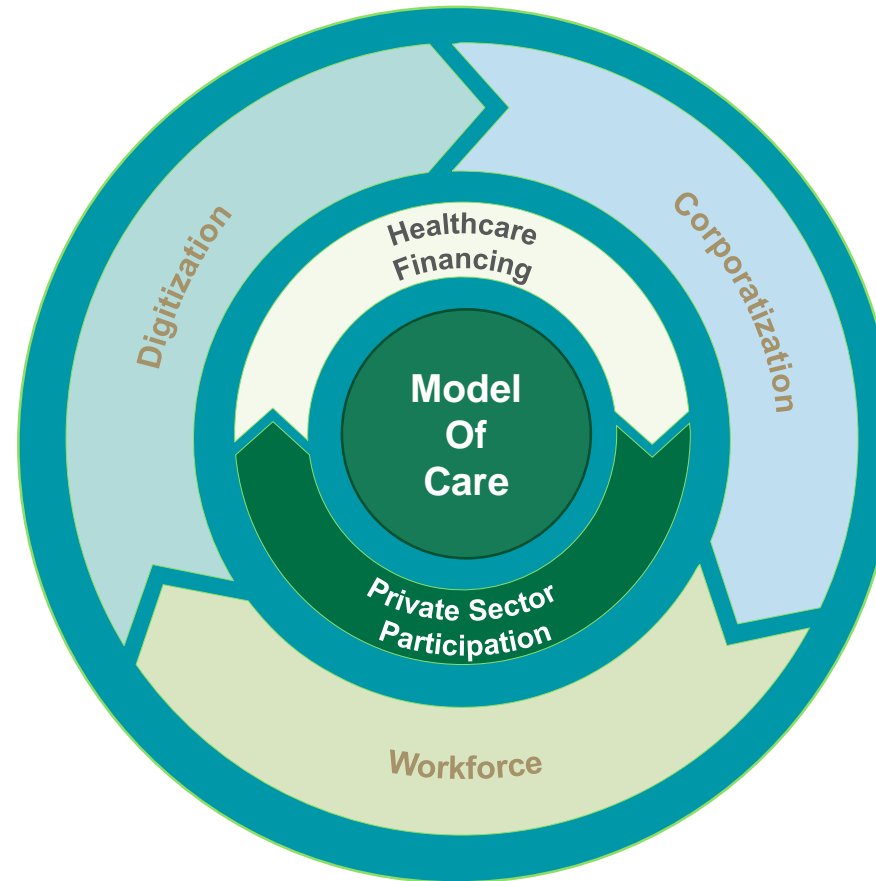
Enhance quality and quantity of workforce through increased capacity, more rigorous licensing and making the profession more attractive

Consumer Centric Model of Care (MoC)

Focus on prevention and on out-of-hospital care models

Private Sector Participation (PSP)

- Facilitate private sector involvement through ownership and/or management of MoH hospitals & services
- Actively support localization of pharmaceutical, vaccines and medical products



Insurance based financing (Health Financing)

Move from government funded to insurance funded system







Independent Governance

Separate regulatory and delivery function by creating independent provider networks with operational autonomy and greater accountability

Corporatization

- Split MoH to corporatize delivery creating independent provider networks with operational autonomy
- Strengthen MoH mandate to lead sector reform with strong oversight over regulatory agencies (“super-regulator”)

National transformation program sets concrete targets for privatization and improvements of service delivery

National transformation program's healthcare targets		Current, %	➔	2020 Target, %
	Private sector contribution to total healthcare spend	25		35
	Hospitals that meet the US median for patient safety culture	10		50
	Healthcare facilities reporting comprehensive performance and quality measures	10		100
	Appointments received in specialized medical disciplines within 4 weeks	<40		70
	Patients who received emergency care in less than 4 hours in key hospitals	40		75
	Saudi citizens who have a unified digital medical record	0		70

\$180Bn of expenditure in the health sector over the next 5 years



Medical devices



Pharmaceuticals



Service provision¹

Cumulative spend over 2017-2021

\$11 Bn

\$42 Bn

\$130 Bn

Spend on capital equipment in 2016

\$1.1 Bn

Spend on patented drugs in 2016

\$4.1 Bn

MoH² hospitals beds in 2016

42 K

Spend on consumables in 2016

\$0.6 Bn

Spend on generic drugs in 2016

\$2.3 Bn

Private hospital beds in 2016

17 K

Spend on patient aids in 2016

\$0.2 Bn

Spend on OTC in 2016

\$1.0 Bn

MoH² primary healthcare centers in 2016

2.3 K

Healthcare & Life Sciences

Investment Categories

Hospital Services

PSP Opportunities such as:

- Radiology
- Primary Healthcare- Hospitals & Medical Cities
- Labs
- Long-term care
- Rehabilitation
- Home care

Pharmaceuticals

Manufacturing of:

- Vaccines
- Biologics & biosimilars
- Sterile injectables
- APIs
- Solid oral dosages

Medical Devices

Manufacturing of:

- Glucometers
- Implants
- 21 products segments such as:
 - IVD
 - Orthopedics
 - Anesthesia
 - Nephrology /Urology
 - Dental
 - Hospital supplies

E-Health

Digital Opportunities such as:

- Electronic Medical record (EMR)
- Picture Archiving & communication systems (PACS)
- Radiology information system (RIS)
- Laboratory information system (LIS)
- Ancillary systems (such as coding, nutrition, preventive medicine, Pt referrals, health education, E-prescription system, patient entertainment)
- Health Information Exchange (HIE)
- Mobile Health (MHealth)
- Big Data
- Business intelligence (BI)
- Artificial intelligence (AI)
- Clinical Decision Support
- Telecare
- Telemedicine

Thank You



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The logo icon consists of a stylized green tree with a vertical stem and a horizontal crossbar, with several green, leaf-like shapes branching out from the top.