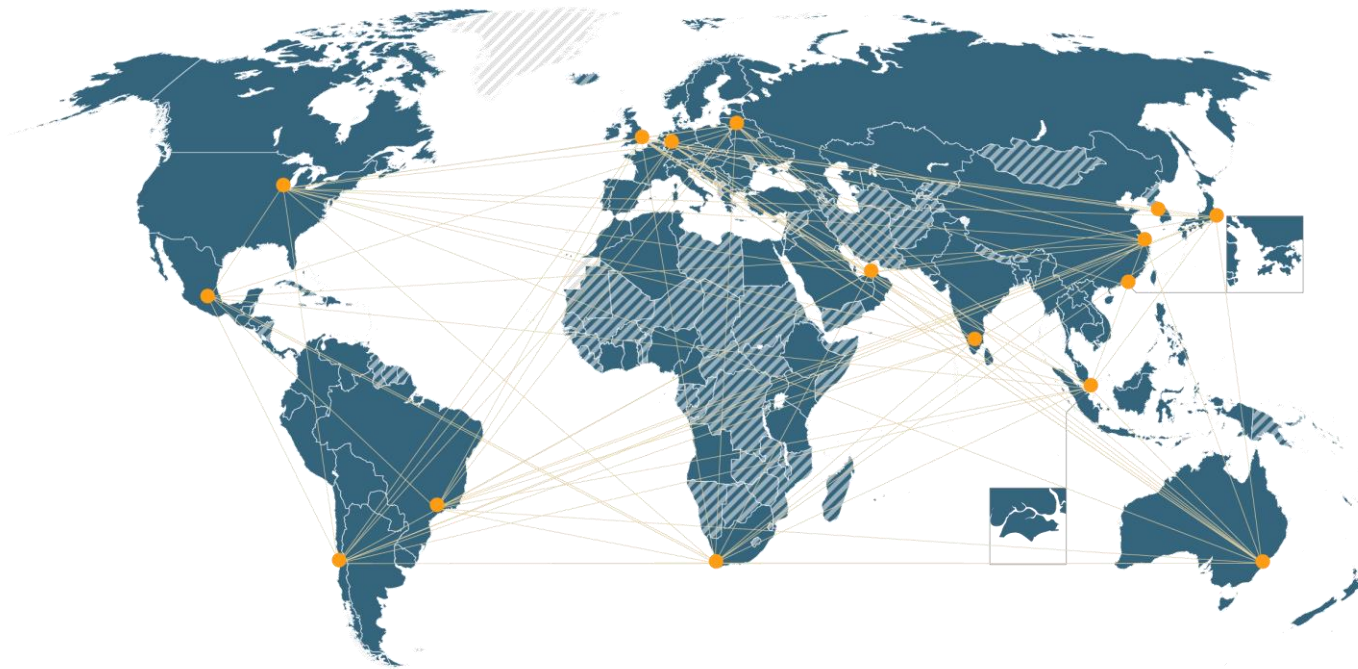


U.S. Healthcare Investments in Saudi Arabia

A custom research presented by Euromonitor International

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100 COUNTRIES

in-depth analysis on
consumer goods and
service industries

210 COUNTRIES + AND TERRITORIES

demographic, macro- and
socio-economic data on
consumers and economies

INVESTMENTS

The Kingdom ranks

10th in **FDI net inflows (2022)** among the G20 countries

14th in Kearney's **2024 Foreign Direct Investment Confidence Index® (FDICI)**

9th Through PIF in Sovereign Wealth Fund's Global ranking 2024

HEALTHCARE

The Kingdom ranks

26th globally in **Healthcare Systems** by World Health Organization in 2011

61st in **Global Healthcare Security Index** among 195 countries in 2021

Kingdom's rapid healthcare transformation is driven by an interconnected ecosystem and diverse Government initiatives

Direct Sectors¹



Healthcare services (*hospitals, clinics and laboratory services*)



Pharmaceutical manufacturers



Healthcare logistics



Pharmacy retail



Medical and laboratory equipment supplies



Medical biotechnology



Insurance companies



Healthcare IT & analytics

Indirect Sectors



Healthcare consulting



Healthcare workforce



Educational institutions
(*Healthcare focus*)

Key Initiatives & Objectives

المجلس الصحي السعودي
Saudi Health Council



Strategic advisory

رؤية
2030
المملكة العربية السعودية
KINGDOM OF SAUDI ARABIA



Health Sector
Transformation
Program



Sector transformation

وقاية
هيئة الصحة العامة
PUBLIC HEALTH AUTHORITY



الصحة القابضة
HEALTH HOLDING



Operational excellence



مستشفى الملك فيصل التخصصي ومركز الأبحاث
King Fahd Specialist Hospital & Research Center
Custody, Saudi Arabia



Saudi NIH
المعهد الوطني لبحوث الصحة



Research & innovation advancement



ضمان
مجلس الضمان الصحي
Council of Health Insurance



Capability building

**National Health
Information Program**
(NHIP)



One profile, one record

Note: ¹Healthcare Ecosystem includes all categories under Direct Sectors excluding 'Pharmacy retail' to avoid double counting pharmaceuticals

Strategic reforms, investments and partnerships doubled the market size of the Kingdom's healthcare ecosystem over the past decade

Healthcare
Ecosystem

SAR 243 Bn. **7.8%**

Market size, 2023

CAGR %, 2014-23

VISION 2030

Laying the foundation for growth

GROWTH ORIENTED POLICY REFORMS

TARGETED INVESTMENTS

across sub-sectors

STRATEGIC PARTNERSHIPS

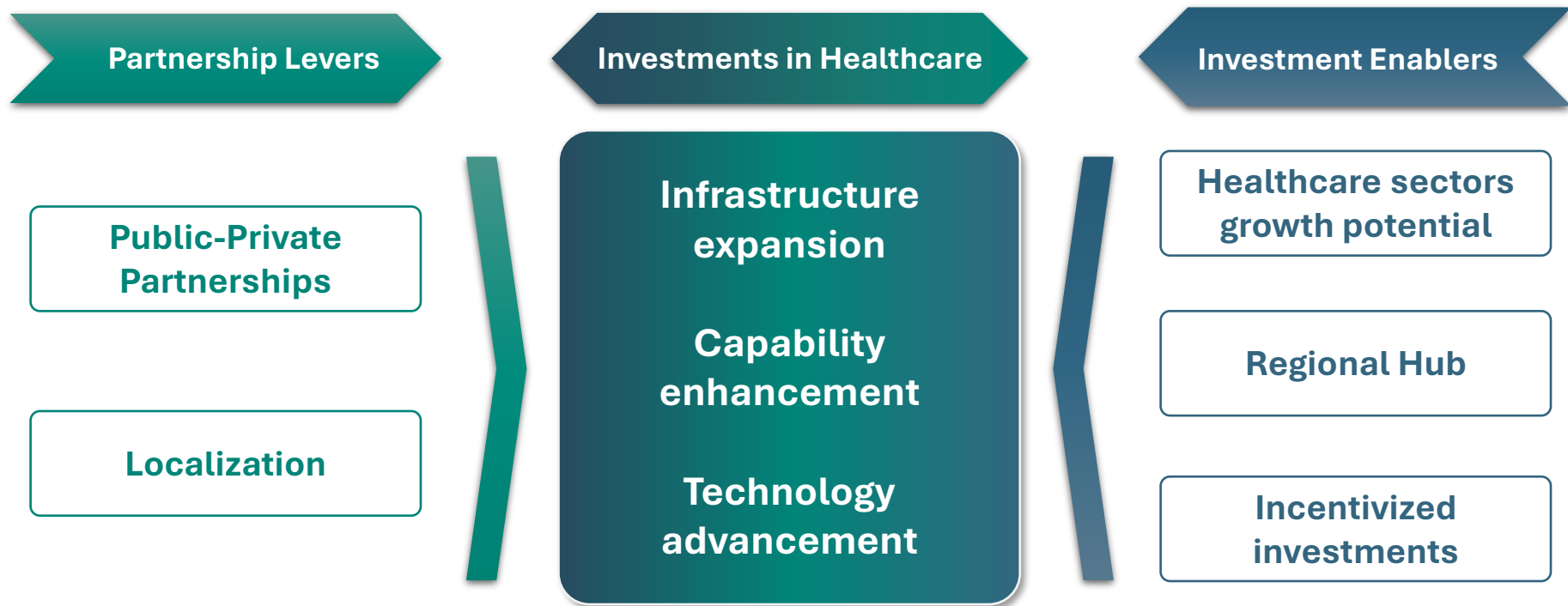
Government
Spending

SAR 1,493 Bn.

Government spending in
Healthcare 2014-23

Source: Euromonitor International estimates based on secondary research, trade and expert interviews

Saudi Arabia's healthcare ecosystem achieved holistic growth gained is driven by the alignment of government initiatives and investment opportunities



Strong inter-country relationships helps the Kingdom leverage the best from across the world

EUROPE & NORTH AMERICA

- Clinical research and Product Innovation
- Knowledge and Technology transfer
- Specialized healthcare

MIDDLE EAST & AFRICA

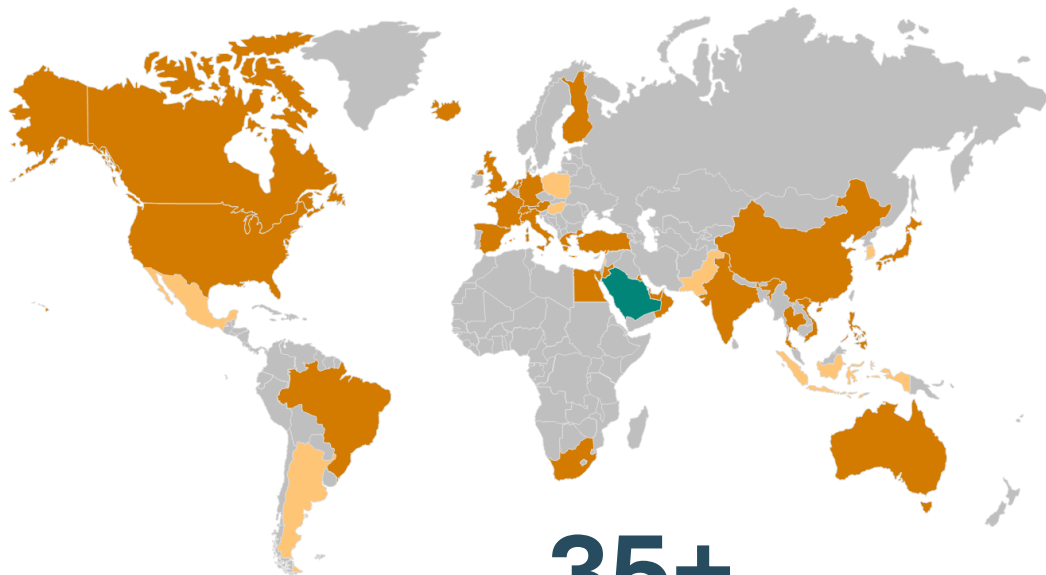
Cultural & Geographical proximity & adaptation

ASIA PACIFIC

- Pharmaceutical Generics
- Specialized medical devices
- Skilled Manpower

LATIN AMERICA

Pharmaceutical generics



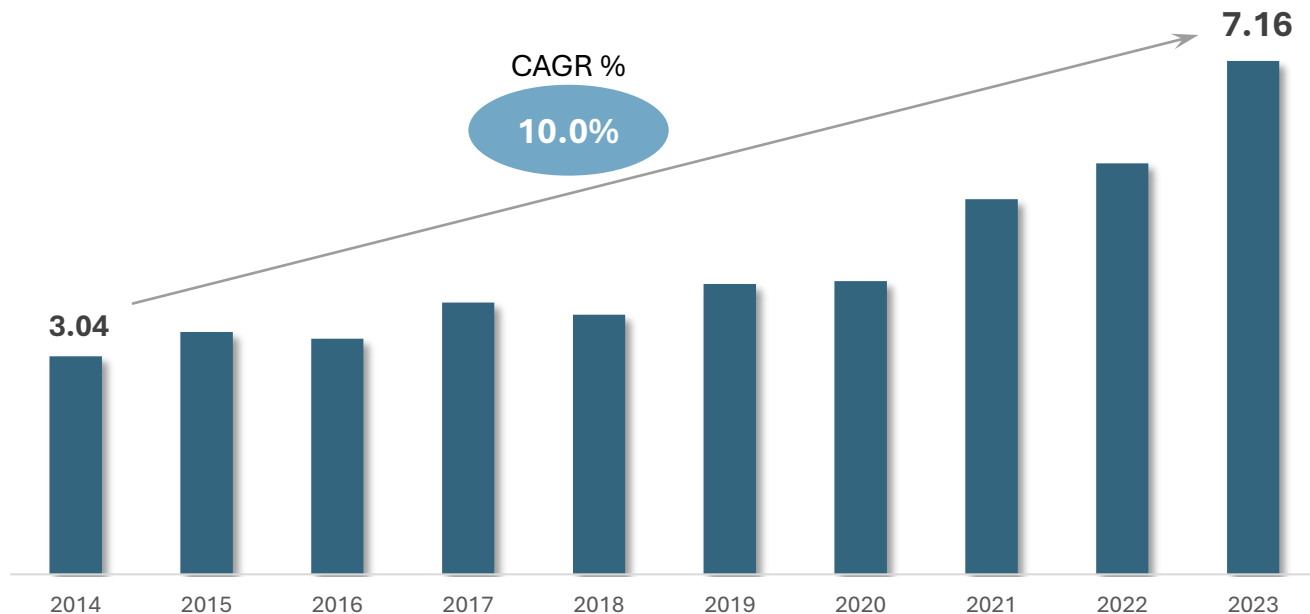
35+

Number of countries engaged in
Saudi's Healthcare sector

Indirect trade / presence
Direct trade / presence

U.S. Healthcare Investments in Saudi Arabia

Strategic focus on market expansion and capability building has doubled the U.S. inflows into the Kingdom's healthcare sector over the past decade



Investment inflows into Saudi's Healthcare sector

(SAR Bn. *)

100+

Number of companies

50.9 Bn.

U.S. inflows into Saudi's Healthcare 2014-23, SAR

84.6%

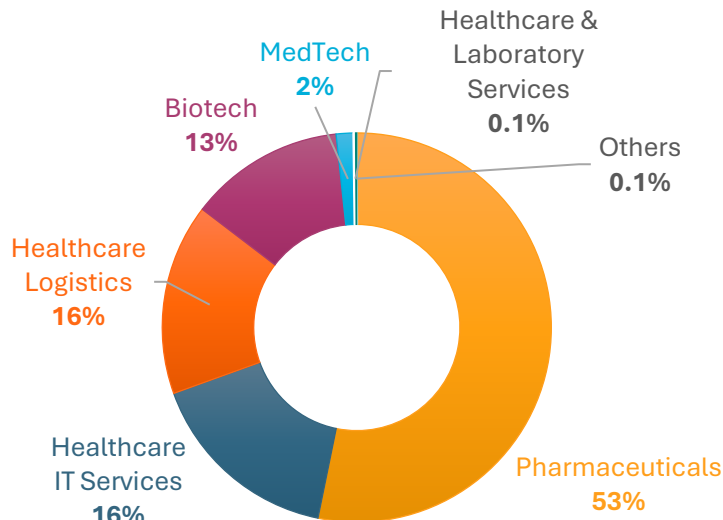
Contribution of OpEx to US inflows, 2014-23

Note: *1 USD = 3.75 SAR

Source: Euromonitor International estimates based on secondary research, trade and expert interviews

The Kingdom's Healthcare Ecosystem benefits from enhancing manpower and technology capabilities through U.S. investments`

U.S. Investment Inflows in Kingdom's Healthcare by sector², 2023



BENEFITS OF U.S. INVESTMENTS IN SAUDI HEALTHCARE

Knowledge Transfer and Skill Development

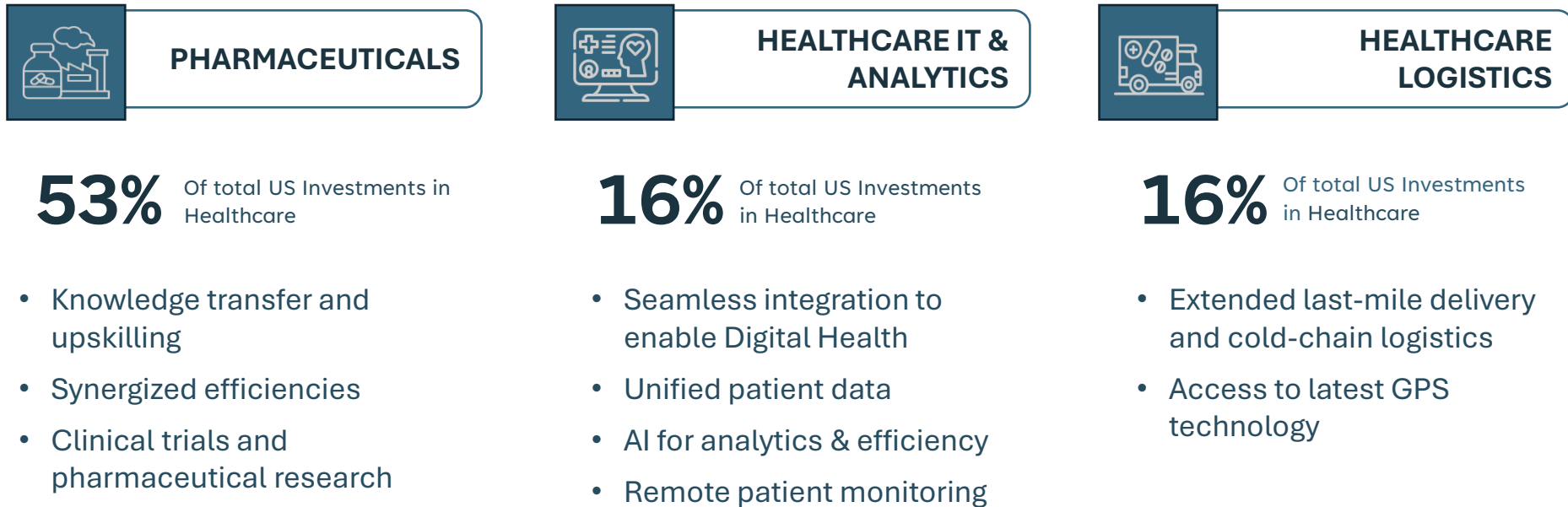
Technology Transfer and advancement

Product and Process Innovation

Easier access through efficient distribution

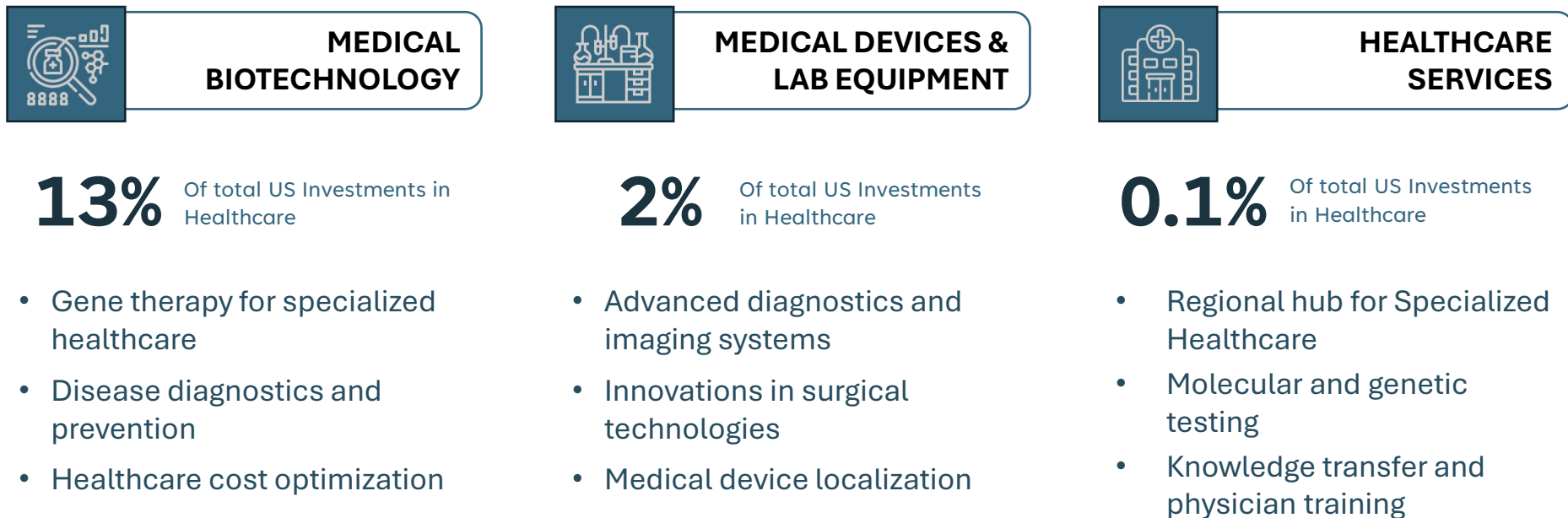
Source: Euromonitor International estimates based on secondary research, trade and expert interviews

U.S. Investments in Healthcare: Direct sectors with high investment inflows



Source: Euromonitor International estimates based on secondary research, trade and expert interviews

U.S. Investments in Healthcare: Direct sectors with high investment inflows



Source: Euromonitor International estimates based on secondary research, trade and expert interviews

Opportunities remain high for healthcare sector investment in the Kingdom

Towards Vision 2030

438 Bn.

Healthcare
ecosystem market
size 2030, SAR

8.8%

Healthcare
ecosystem 2023-30
CAGR, %

Interconnected ecosystem

Privatization to enable last-mile availability

Preventive healthcare

Beyond 2030

Specialized healthcare

Experience More

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Appendix

METHODOLOGY & SOURCES

SOURCES

- Secondary sources include statistics / insights published by global and local sources such as WHO, World Bank, BEA, UNCTAD, SWF, fDI Insights, Pharmaboardroom, ITA, GASTAT, MoH, MISA, IQVIA, Euromonitor Passport and internal database, official press sources and other established data sources.
- Primary sources include insights gathered from trade and expert interviews conducted with US-based and local joint-venture entities between September and October 2024

METHODOLOGY

- Healthcare ecosystem market size based on published sources, Euromonitor Passport and internal database and validation through primary research.
- Estimation of investment inflows by sector was based on analysis of official sources such as BEA, MISA and fDI Insights and insights received from trade and expert interviews.