



NORTH AFRICA HEALTH

06 - 08 APRIL 2019
EGYPT INTERNATIONAL EXHIBITION CENTER
(EIEC), CAIRO

informa
exhibitions

Informa Exhibitions, the world's largest exhibitions organiser, has announced that the Mediconex Exhibition & Congress will be rebranded as North Africa Health. The re-imagined healthcare event will be held at the **Egypt International Exhibition Center (EIEC), Cairo, on 6-8 April 2019**. The rebranding follows Informa's completion of the full acquisition of the Mediconex brand servicing the crucial North African healthcare market and brings the event in line with the global Informa portfolio of market leading B2B healthcare exhibitions including Arab Health, Hospitalar, FIME, MEDLAB Middle East and Africa Health, among others.

North Africa Health will welcome 4,500 attendees from across the healthcare sector with 200+ exhibiting companies from 20 countries showcasing the latest medical device technologies and healthcare services. Not only is the event a B2B stage for healthcare professionals that is designed to stimulate trade and interaction with dealers and distributors from the North Africa region, CME-accredited conference programmes providing insights into the latest clinical and non-clinical healthcare trends in the market.

Egypt Healthcare Overview

HEADLINE PHARMACEUTICALS & HEALTHCARE FORECASTS (EGYPT 2016-2022)

Indicator	2016	2017	2018f	2019f	2020f	2021f	2022f
Pharmaceutical sales, USDbn	3.538	2.148	2.344	2.523	2.653	2.787	2.939
Pharmaceutical sales, % of GDP	1.31	1.13	0.98	0.89	0.83	0.78	0.75
Pharmaceutical sales, % of health expenditure	28.9	28.5	28.1	27.7	27.3	27.0	26.6
Health spending, USDbn	12.245	7.537	8.343	9.105	9.709	10.339	11.052

f = Fitch Solutions forecast. Source: WHO, National Sources, Fitch Solutions

Healthcare: EGP134.5bn (USD7.5bn) in 2017 to EGP147.1n (USD8.3bn) in 2018; +9.4% in local currency terms and +10.7% in

Egypt Healthcare Overview

In July 2018, the World Bank announced plans to invest EGP9.5bn (USD530mn) towards Egypt's healthcare system as part of the country's health reform package. The investment will be staggered over the coming five years to 2022 and will be implemented via the Egyptian Ministry of Health and Population (MoHP)

Key aims of the five-year project 'Transforming Egypt's Healthcare System' include:

- ✓ Scaling up Egypt's Hepatitis C program to treat 1.5mn patients per annum.
- ✓ Screening 20mn adults against non-communicable diseases and risk factors.
- ✓ Introducing a new universal health insurance system.
- ✓ Improving the quality of care across 600 primary healthcare facilities and 27 hospitals, with new digital tools being introduced.

EGYPT MEDICAL DEVICES MARKET

PROJECTED MEDICAL DEVICE MARKET, 2017-2022

	2017	2018	2019	2020	2021	2022
Total (Local Currency mn)	11,272.9	13,219.5	15,312.3	17,779.3	20,422.8	23,105.2
Per Capita (Local Currency)	115.6	133.0	151.4	172.7	195.1	217.1
Total (USDmn)	631.7	749.5	865.1	976.9	1,089.2	1,200.3
Per Capita (USD)	6.5	7.5	8.6	9.5	10.4	11.3
Exchange Rate (Local Currency/USD)	17.8	17.6	17.7	18.2	18.8	19.3

Source: National Statistics, Fitch Solutions

Strengths & Key Drivers

- ✓ No serious disputes with neighboring states
- ✓ Strong regional support from Saudi Arabia and the UAE
- ✓ Suez Canal forms a key global maritime trade route
- ✓ Largest population in the Arab world
- ✓ Fifth largest medical device market in the MENA region
- ✓ Medical device import dependency

EGYPT MEDICAL DEVICES MARKET

Opportunities

Economic growth to accelerate on political stability and reforms

- ✓ EGP stability ahead as fundamentals improve from 2018
- ✓ Low wages in global terms, which are an advantage for foreign investors
- ✓ Significant government investment in the utilities network
- ✓ Growing population and increasing life expectancy
- ✓ Changing epidemiological profile
- ✓ Transitional healthcare industry; primary care reform is needed
- ✓ Introduction of a universal health insurance system
- ✓ Rising health expenditure, with increasingly important private sector
- ✓ Low per capita health expenditure, which indicates potential for growth
- ✓ Ongoing health infrastructure projects
- ✓ Government to improve access to the ageing healthcare infrastructure
- ✓ Regional medical tourism
- ✓ Large diagnostic imaging share for a developing market
- ✓ Medical device import opportunities, growing presence of multinationals

EGYPT MEDICAL DEVICES MARKET

MEDICAL DEVICE MARKET BY PRODUCT AREA, 2012-2022 (USDMN)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
CONSUMABLES	83.1	95.1	93.0	116.7	97.8	107.7	126.8	144.0	161.2	178.2	194.3
DIAGNOSTIC IMAGING	107.6	138.0	135.7	176.8	142.5	159.7	185.8	214.3	242.1	270.2	299.0
DENTAL PRODUCTS	39.7	42.9	48.7	63.1	42.1	35.9	44.9	55.0	62.8	68.8	76.0
ORTHOPAEDICS & PROSTHETICS	34.4	35.8	37.7	41.6	40.2	19.5	27.0	33.9	41.4	48.8	55.6
PATIENT AIDS	55.5	65.7	81.5	84.1	83.8	83.6	103.2	121.0	139.2	156.9	174.0
OTHER MEDICAL DEVICES	219.5	216.3	227.2	226.8	179.5	225.2	261.8	296.9	330.2	366.3	401.4
TOTAL	539.8	593.8	623.8	709.1	586.0	631.7	749.5	865.1	976.9	1,089.2	1,200.3

Source: National Statistics, Fitch Solutions

EGYPT MEDICAL DEVICES MARKET

TOP 20 MEDICAL DEVICE SUPPLIERS, 2017 (USD000S)

	Country	2017	% Total
1	Germany	177,854	29.2
2	US	97,446	16.0
3	China	59,587	9.8
4	UK	34,061	5.6
5	Japan	31,900	5.2
6	Italy	21,798	3.6
7	France	20,829	3.4
8	South Korea	20,140	3.3
9	Malaysia	16,238	2.7
10	Austria	16,106	2.6

EGYPT MEDICAL DEVICES MARKET

DETAILED LEADING MEDICAL DEVICE SUPPLIERS BY PRODUCT AREA, 2017 (USD000S)

	Germany	US	China	UK	Japan	EU-28
CONSUMABLES	14,945	6,076	11,391	1,552	1,749	30,900
DIAGNOSTIC IMAGING	38,523	24,307	18,790	15,851	22,266	79,360
DENTAL PRODUCTS	10,950	5,650	4,161	2,048	1,152	19,256
ORTHOPAEDICS & PROSTHETICS	3,608	4,213	2,061	4,592	0	10,292
PATIENT AIDS	23,129	23,576	5,686	4,179	1,255	55,813
OTHER MEDICAL DEVICES	86,699	33,624	17,498	5,839	5,478	134,405

EGYPT MEDICAL DEVICES MARKET

Ongoing Healthcare Infrastructure Projects Will Support Medical Device Market Growth

- ✓ • **September 2018:** The president inaugurate of health projects including a military hospital in Menoufiya governorate, a national specialized medical institute in Damanhour, and a memorial institute for ophthalmology research in Giza.
- ✓ • **August 2018:** Saudi investor Fawaz Mohammed Bashraheel, disclosed a plan to open an integrated medical city project in Egypt, with an initial investment of USD1bn. The project will be built on an area of 500,000 square metres and will be the biggest medical city in the world.
- ✓ • **April 2018:** Al Motahedoon Group for Real Estate Development and Management launched a new project, Eterna Helathcare City, a high-class medical complex located at the centre of Mivida's business district. The project will be developed at a total cost of EGP1.2bn (USD68.0mn) and will be delivered by 2021. This is the third medical real estate development by Al Motahedoon Group, following Healthcare City (HCC) and the Cairo Medical Centre (CMC).
- ✓ • **February 2018:** Health Minister Ahmed Emad Eddin announced the establishment of an integrated medical city in the new administrative capital. The medical city will include three hospitals; a 300-bed general hospital with all medical specialties, a 300-bed children's hospital and a 300-bed hospital for women and maternity care. The new capital will be located between Cairo and the Suez Canal region and will accommodate up to five million people.

NORTH AFRICA HEALTHCARE & MEDICAL DEVICES MARKET :

MOROCCO

Statistics

Total population (2016)	35,000
Gross national income per capita (PPP international \$, 2013)	7
Life expectancy at birth m/f (years, 2016)	75/77
Probability of dying under five (per 1 000 live births, 0)	not available
Probability of dying between 15 and 60 years m/f (per 1 000 population, 2016)	74/65
Total expenditure on health per capita (Intl \$, 2014)	447
Total expenditure on health as % of GDP (2014)	5.9

Opportunities & Products needed

- ✓ Magnetic resonance imaging and ultra-sonic scanning equipment
- ✓ X-Ray equipment
- ✓ Cancer Treatment
- ✓ Hospital infrastructure
- ✓ Emergency aid (equipment and services)
- ✓ Monitoring and electro-diagnostic equipment
- ✓ Computerized tomography equipment
- ✓ ICT (E-medicine, equipment and related software)

NORTH AFRICA HEALTHCARE & MEDICAL DEVICES MARKET :

ALGERIA

Statistics

Total population (2016)	40,000
Gross national income per capita (PPP international \$, 2013)	12
Life expectancy at birth m/f (years, 2016)	75/77
Probability of dying under five (per 1 000 live births, 0)	not available
Probability of dying between 15 and 60 years m/f (per 1 000 population, 2016)	106/84
Total expenditure on health per capita (Intl \$, 2014)	932
Total expenditure on health as % of GDP (2014)	7.2

Opportunities & Products needed

- ✓ Over the next decade construction of 172 public hospitals, 377 private clinics, 45 specialized health units and 70 centres focusing on people with disabilities will increase demand for medical equipment and supplies, as well as medical construction services.
- ✓ Algerians are increasingly turning to private clinics for outpatient care.
- ✓ Opportunities will increase for the design and management of such facilities and for sales of cutting-edge diagnostics and treatment equipment.
- ✓ Cosmetic surgery is not yet common, but consumer interest is rising.

NORTH AFRICA HEALTHCARE & MEDICAL DEVICES MARKET :

TUNISIA

Statistics

Total population (2016)	11,000
Gross national income per capita (PPP international \$, 2013)	10
Life expectancy at birth m/f (years, 2016)	74/78
Probability of dying under five (per 1 000 live births, 0)	not available
Probability of dying between 15 and 60 years m/f (per 1 000 population, 2016)	111/71
Total expenditure on health per capita (Intl \$, 2014)	785
Total expenditure on health as % of GDP (2014)	7.0

Opportunities & Products needed

- ✓ Medical equipment, especially in high technology products, finds a receptive Tunisian market.
- ✓ A governmental program to upgrade the country's hospitals and increase the number of private clinics has created a large demand for medical equipment.
- ✓ Medical tourism as a field remains largely untapped.

NORTH AFRICA HEALTHCARE & MEDICAL DEVICES MARKET :

LIBYA

Statistics

Total population (2016)	6,293,000
Gross national income per capita (PPP international \$, 2009)	28,110
Life expectancy at birth m/f (years, 2016)	69/75
Probability of dying under five (per 1 000 live births, 0)	not available
Probability of dying between 15 and 60 years m/f (per 1 000 population, 2016)	196/103
Total expenditure on health per capita (Intl \$, 2014)	806
Total expenditure on health as % of GDP (2014)	5.0

Opportunities & Products needed

As part of the Government initiative to transform the healthcare sector, reforms underway include:

- ✓ Supporting the government hospitals' accreditation projects.
- ✓ Renovating and purchasing medical diagnostic devices and therapeutic equipment.
- ✓ Developing and implementing health information systems and medical research.
- ✓ Establishing a number of new hospitals.
- ✓ Improving the quality of health care and hospital services.
- ✓ Expanding and upgrading hospital infrastructure including the extension and modernization of paediatric facilities.
- ✓ Improving emergency services.

NORTH AFRICA HEALTHCARE & MEDICAL DEVICES MARKET :

SUDAN

Statistics

Total population (2016)	39,000
Gross national income per capita (PPP international \$, 2013)	2
Life expectancy at birth m/f (years, 2016)	63/67
Probability of dying under five (per 1 000 live births, 0)	not available
Probability of dying between 15 and 60 years m/f (per 1 000 population, 2016)	253/195
Total expenditure on health per capita (Intl \$, 2014)	282
Total expenditure on health as % of GDP (2014)	8.4

Opportunities & Products needed

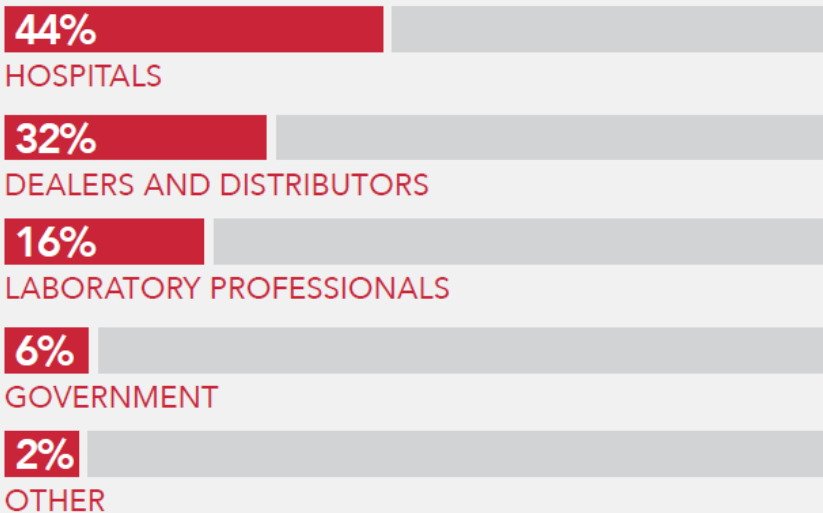
- ✓ 5.6 physicians per 10,000 population
- ✓ 47.6 nurses and midwives per 10,000 population
- ✓ Sudan has a difficulty to navigate medical device purchasing market, with sanctions and govt corruption causing bottlenecks in the market, and allowing few key distributors to have high levels of market power (Main target).

EXHIBITORS PROFILE

- ✓ **Radiology & Imaging**
- ✓ **Surgery**
- ✓ **Laboratory & diagnostics**
- ✓ **Orthopaedics**
- ✓ **Consumables**
- ✓ **Anaesthesia**
- ✓ **Patient Aids**
- ✓ **Hospital Furniture**
- ✓ **Digital Healthcare & IT**
- ✓ **Other Instruments & Appliances**

VISITORS PROFILE

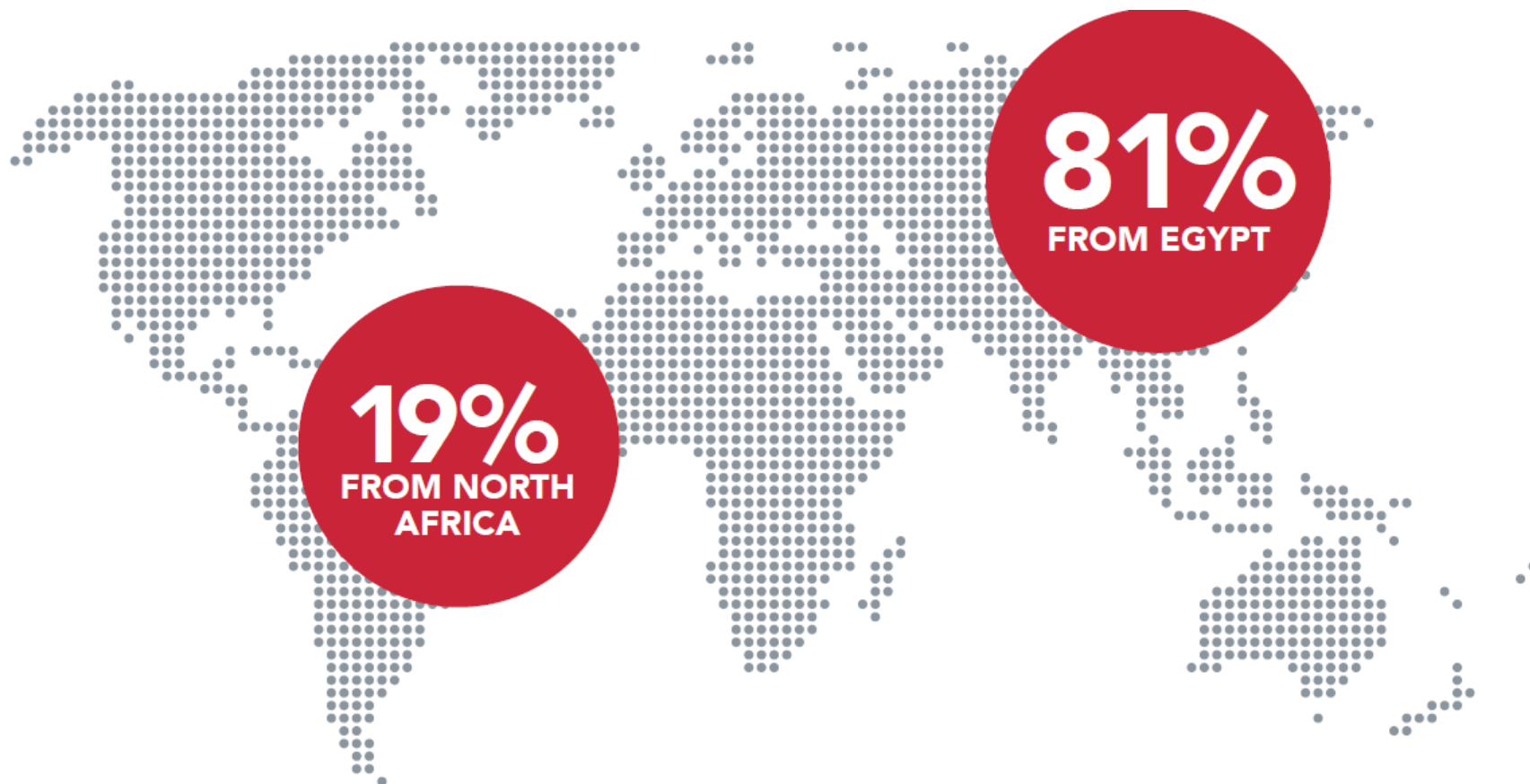
AREA OF BUSINESS



REASONS FOR VISITING:



TARGET AUDIENCE & COUNTRIES



Target Countries will include: Morocco, Tunisia, Sudan, Libya. Algeria

SNAPSHOT:

- **3 CME** Conferences across all 3 days
- Partnerships with the 3 biggest associations in Egypt
- Conferences are aligned with supporting exhibition growth in the fields of imaging & diagnostics, surgery and lab
- Will attract approx 2000 healthcare professionals, including:
- Radiologists, radiographers, lab managers, lab technicians and surgeons
- Key hospitals and universities represented from across Egypt including:
 - ✓ Ain Shams University
 - ✓ Cairo University
 - ✓ Alexandria University
 - ✓ Sheikh Zayed Specialised Hospital
 - ✓ Air Force Specialised Hospital

ESRNM – Egyptian Society of Radiology and Nuclear Medicine

Key topics include:

- ✓ Digital imaging systems
- ✓ Oncological imaging
- ✓ Latest updates in nuclear medicine



Confirmed speakers to date:

- ✓ **Prof Dr Tarek El Diasty**, President, **Egyptian Society of Radiology and Nuclear Medicine**
- ✓ **Prof Alaa Akl**, Assistant Professor, Military Medical Academy, Head, Radiology Department, **Air Force Specialized Hospital**
- ✓ **Dr Dinesh Chinchure**, Senior Consultant, Department of Diagnostic Radiology, **Khoo Teck Puat Hospital, Singapore**
- ✓ Prof Sudhir Vinayak, President, African Society of Radiology, Chairman of Radiology, **Aga Khan University Hospital, Nairobi, Kenya**

Speaking opportunities available until 14 Feb

ESLM – Egyptian Society of Laboratory Medicine

Key topics include:

- ✓ Endocrinology
- ✓ Microbiology
- ✓ Histopathology
- ✓ Haemato-oncology
- ✓ Cancer immunology and immunotherapy



Confirmed speakers to date:

- ✓ **Professor Dr Saad Sayed Eissa**, Chairman Pathology Department, NCI, **Cairo University**
- ✓ **Dr Mark Litzow**, Professor of Medicine, Head of Acute Leukaemia Group, **Mayo Clinic, USA**
- ✓ **Dr Dia Kamel**, Reader and Head of Academic Department of Pathology, School of Medicine, **Anglia Ruskin University, Chelmsford, Essex, UK**
- ✓ **Professor Walid Mourad**, Clinical Professor of Pathology, **University of Calgary, Canada**

Speaking opportunities are still available until 14 Feb

ACS – American College of Surgeons, Egypt Chapter

Key topics include:

- ✓ Women in surgery in Africa symposium
- ✓ Breast cancer: recent trends
- ✓ Bariatric and metabolic surgery



Confirmed speakers to date:

- ✓ **Dr Heather Bougard**, Head Clinical Unit, Surgery, **New Somerset Hospital, South Africa**
- ✓ **Dr Stanley Ashley**, General & Gastrointestinal Surgery, **Brigham and Women's Hospital, US**
- ✓ **Dr Omar Sherif Omar**, Professor, Surgical Oncology, **Cairo University, Cairo, Egypt**
- ✓ **Prof Mohey Elbanna**, Professor, General and Bariatric Surgery, Ain Shams University, Governor, **Egypt Chapter of the American College of Surgeons, Cairo, Egypt**

Speaking opportunities are still available until 14 Feb