



Unlock Opportunities Across the Middle East





U.S. Commercial Service

**Our Mission: Grow U.S. exports to
increase U.S. jobs.**

How to *Unlock Opportunities* in the Middle East

Welcome Remarks

- *Monica Toporkiewicz, Healthcare Global Team, U.S. Dept. of Commerce*

How to Leverage the USA Pavilion at Arab Health

- *Jodi Munzer, Sales Manager, Kallman Worldwide*

Tips for U.S. Companies from a Local Distributor

- *Mina Botros, Business Development Manager, Al Rowais Medical*

Overviews of Healthcare Opportunities in Key Markets

- *Bruce Ellsworth, Commercial Attaché, Gulf Healthcare Team*
- *Suzan M. Barbour, Commercial Specialist, U.S. Embassy in Jordan*
- *Vandana Nair, Commercial Specialist, U.S. Consulate in Dubai*

Closing Remarks

- *Mark Kilimnik, Healthcare Global Team, U.S. Dept. of Commerce*



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USA PARTNERSHIP PAVILION



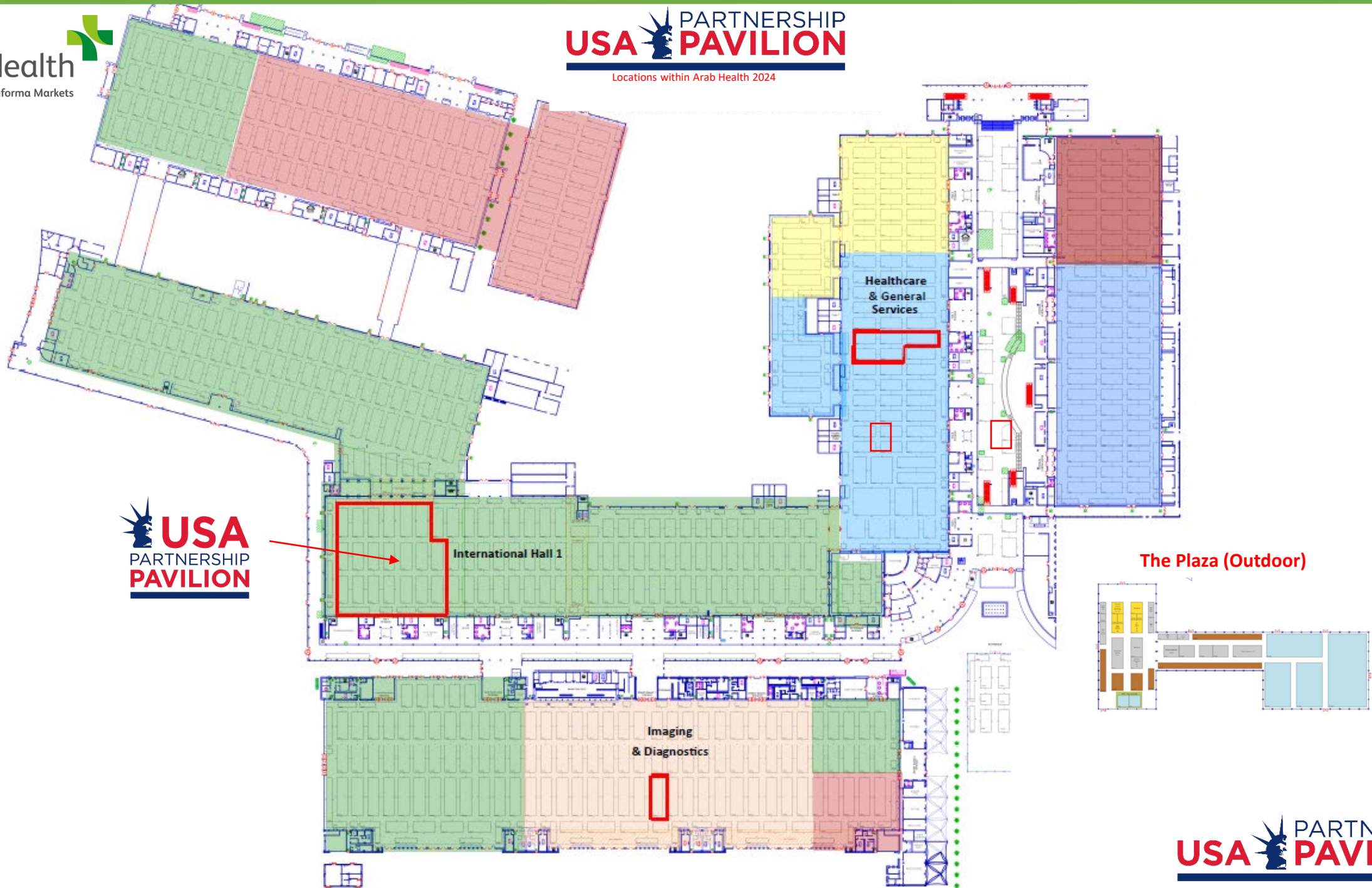
PROUD RECIPIENT OF THE PRESIDENT'S E-STAR
AWARD

Presented by:



Arab Health Site Plan



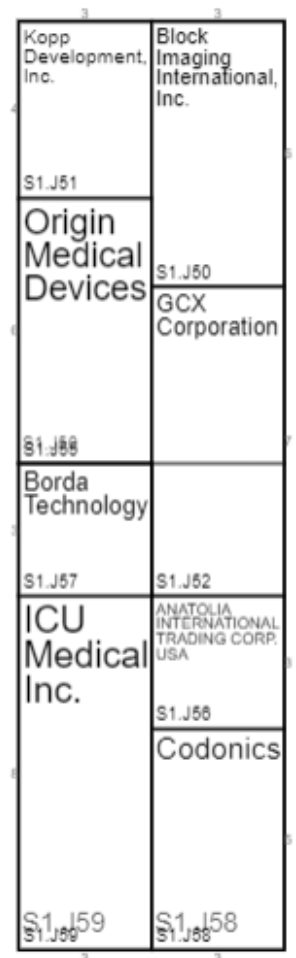


USA
PARTNERSHIP
PAVILION

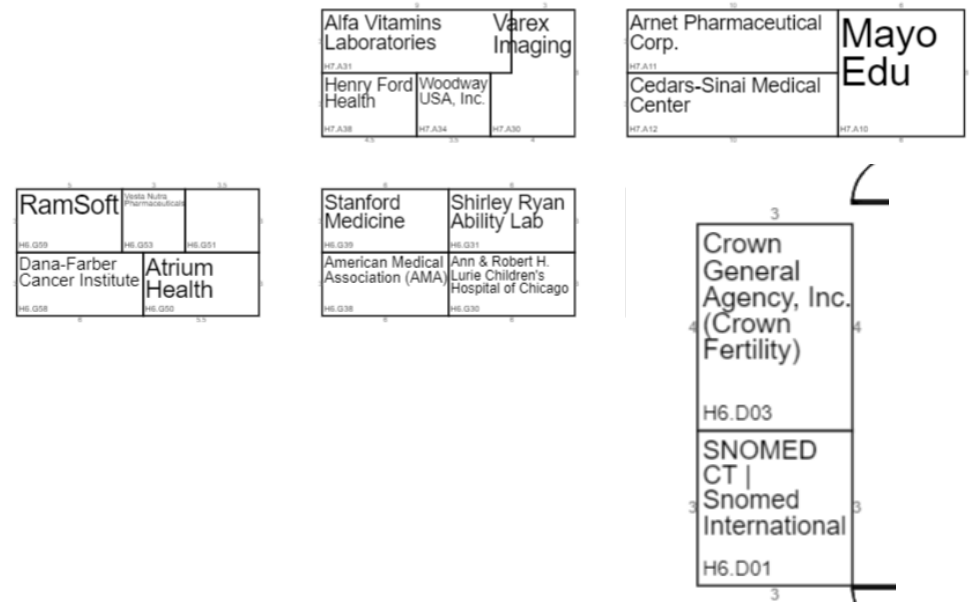
USA Partnership Pavilion Floorplan



Hall 1- International Hall



Saeed 1- Imaging



Hall 6&7- Healthcare and General Services

USA Partnership Pavilion at Arab Health 2024

- 3,000+ net sqm
- Approximately 270 exhibitors in 2023
- 2024 exhibitors include:
 - Cedars-Sinai Medical Center
 - Dana-Farber Cancer Institute
 - DETECTO
 - Ferno
 - Ann & Robert H. Lurie Children's Hospital of Chicago
 - Mayo Clinic
 - Northwestern Medicine
 - Shirley Ryan Ability Lab
 - Stanford Health Care
 - Varex Imaging Corp



State Groups at Arab Health 2024

State Trade Expansion Program (STEP)

Small businesses looking to start or expand their global customer reach can use resources offered by state entities that have received STEP funding.

<https://www.sba.gov/funding-programs/grants/state-trade-expansion-program-step>

Participating state groups include:

- *California
 - *Colorado
 - Florida
 - Georgia
 - Illinois
 - New York
 - North Carolina
 - Ohio
- * Contract Pending



USA Partnership Pavilion Exhibit Options

- Turnkey: Fully furnished USA-branded hard wall structure.
 - Turnkey upgrades available.
- Space Only: Raw space option requires a complete custom build.
- Kallman Creative Services: Our team of skilled stand builders will bring your vision to life.



USA Partnership Pavilion Services & Amenities



- Pre-show and onsite support from U.S. Commercial Service
- High-level networking: USA Partnership Pavilion VIP Reception and business briefings
- Inclusions in USA Exhibitor Directory - powered by www.sourcehere.com
- High-level delegations touring the pavilion
- Marketing and media promoting USA Partnership Pavilion Exhibitors
- USA Partnership Pavilion Meeting Point- Executive Club Suites

Executive Club Suites

Experience a full-service hospitality suite right on the show floor! Executive Club Suites are ideal for high-level meetings within the center of The USA Partnership Pavilion in Hall 1.

- Upscale conference rooms
- Rooms are equipped with conference room furniture and AV equipment
- Hostess to direct your guests
 - Catering available upon request
- Access to casual meeting space within the open seating section of the lounge



USA Partnership Pavilion Programs

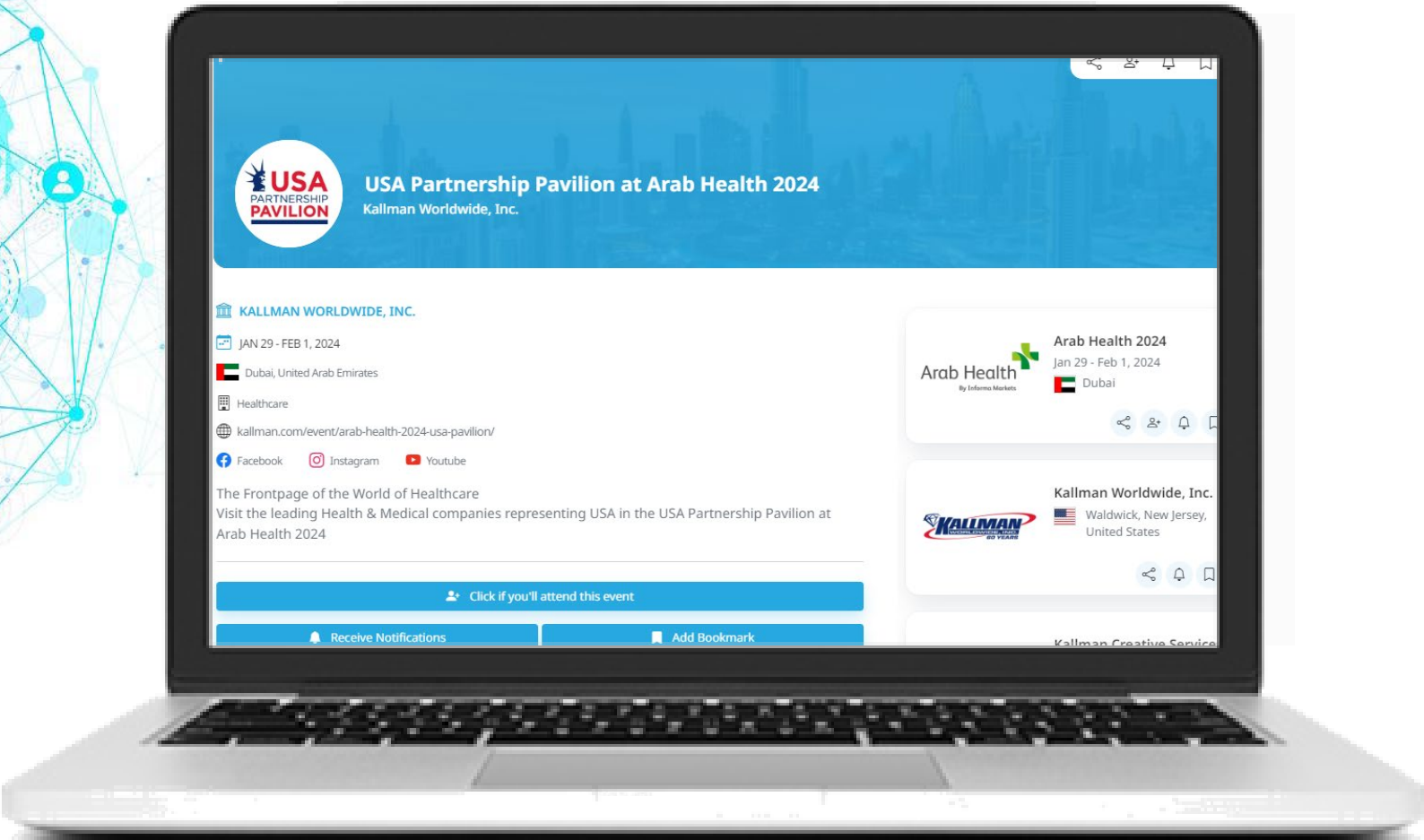
Become a sponsor!

- **USA Partnership Pavilion Ribbon Cutting & Opening Ceremony**
 - Key USA stakeholders, government officials, and invited guests gather on opening morning to kick off the exhibition.
- **VIP Reception – by invitation only**
 - USA Pavilion exhibitors and sponsors along with VIPs from the region, U.S. government officials, and other key stakeholders gather for a special evening of networking and relationship building.
- **USA Pavilion Hospitality**
 - Exhibitor lounges and meeting spaces by appointment.
- **Industry and Market Briefings**
 - USA Pavilion exhibitors are invited to attend info sessions led by market and industry experts from across the globe.



USA Partnership Pavilion Digital Directory at Arab Health

www.sourcehere.com



Join the USA Partnership Pavilion at Arab Health 2024!

For more information please contact:

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Tips from A Regional Medical Distributor



Tips for U.S. Companies from a Local Distributor About Doing Business in the Middle East

Mr. Mina Botros

Business Development Manager

Al Rowais Medical

www.rowaismed.com

mina@rowaismed.com



Established in Dubai in 2003, Al Rowais Medical Equipment is a leading regional distributor based in the UAE supplying a range of medical products specialized in Coloproctology, Laparoscopy, Obstetrics/Gynecology and Cardiology.



Al Rowais Medical Group

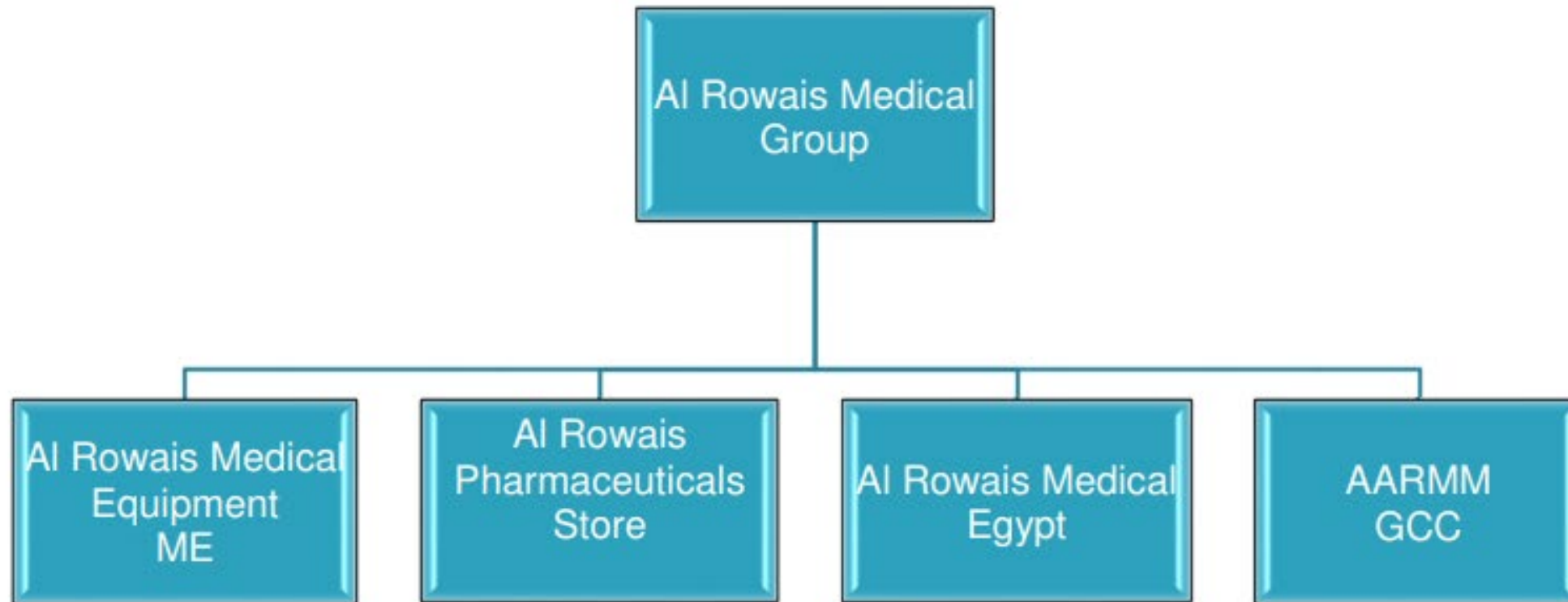
Your bridge to new frontiers

Market Tips

- ☐ Authorized Representative
- ☐ MOH Registration
- ☐ MOE Registration
- ☐ One distributor for the region or sub geo-market
- ☐ Training
- ☐ Distributor Selection



Al Rowais Medical Group



What We Do

- ❑ Represent you in the Middle East
- ❑ Register your product lines
- ❑ Tailor-make a region-wide marketing plan
- ❑ Conduct/participate in symposiums, conferences and exhibitions in collaboration with our network of key opinion leaders
- ❑ Sell, distribute and maintain your products
- ❑ Ensure professional after sales services, and maintain a long-term relationship with our clients





The Region

Q&A

We welcome questions!

Please type your questions into the chat box.

How to *Unlock Opportunities* in the Middle East



Overview of Healthcare Opportunities in Middle East and Qatar Markets

- *Bruce Ellsworth, Commercial Attaché, Gulf Healthcare Team*

Middle East Market: Big and Growing



High Growth: The healthcare market is growing at 10% annually due to growing per capita income.



Large Markets: The top 5 are Saudi Arabia, UAE, Qatar, Oman and Egypt. Jordan is also attractive.



Big Population: Over 411 million people with high levels of education are seeking a higher quality of life.



Key Opportunities: Development of more specialty care is driving demand for the latest technology.



Middle East Vision: A Higher Standard of Care

- Investment in **state-of-the-art healthcare infrastructure** led by governments and sovereign wealth funds.
- Focus on attracting and training **the best healthcare professional talent** to enable a higher standard of care.
- **Rising medical tourism** brings more patients to the region from as far as Africa and Southeast Asia.
- Policies making health insurance mandatory are contributing to an **acceleration of market growth**.

Saudi Arabia Health Sector Opportunities

- **The pharmaceutical and medical device market** is valued at U.S. \$12 billion. The pharmaceutical market is U.S. \$10 billion with projected annual growth of 7% over the next six years. Medical devices are U.S. \$2 billion with projected annual growth of 10%.
- **Best prospect sub-sectors** include digital health, medical devices, long-term care/rehabilitation, outpatient surgical centers, and hospital management.
- **Public Private Partnerships are an opportunity** under Vision 2030. Saudi Arabia's Privatization Program was launched in 2018 to identify government assets and services that can be privatized in healthcare. Opportunities include medical cities, hospitals, primary healthcare centers, long-term care, radiology, and rehabilitation.

Saudi Arabia Health Sector Opportunities

- Saudi Arabia is the largest economy in the Middle East and North Africa region at U.S. \$ 833 billion with a population of 35.2 million.
- Budget allocated to healthcare and social development sector in 2022 is U.S. \$ 36.8 billion.
- Under Vision 2030, the Saudi Arabian government plans to invest over U.S. \$65 billion to develop the country's healthcare infrastructure.
- It aims to increase private sector share from 40% to 65% by 2030, targeting the privatization of 290 hospitals and 2,300 primary health centers.



Qatar Health Sector Opportunities

Quick Facts

- Population of 2.2 million people. Spending guided by Qatar's National Health Strategy.
- Healthcare expenditure is 73% public and 23% private and accounts for 6.8% of GDP.
- There are: 21 Hospitals; 3,620 Beds; 8,192 Physicians; 29,412 Nurses.



In Affiliation With
 Cedars
Sinai

Partnerships with U.S. Hospitals

- “The View Hospital” project was created through private partnerships between Elegancia Healthcare and Los Angeles’ Cedars-Sinai Hospital.
- Alfardan Group and Chicago’s Northwestern Medicine partnered to create the 11,000 square meter *Alfardan Medical with Northwestern Medicine* at Burj Alfardan in Lusail.
- Ongoing privatization trends are supported by the Qatari government.



Opportunity for Home Healthcare Technology & Services

- As the population ages, demand for quality products and services is rising. Preventative care and managing chronic illness at home are among the key priorities identified by Qatar’s Primary Health Care Corporation.

Qatar Health Sector Opportunities

New Qatar Insurance Program: A new Qatari law came into partial effect in May 2022 for the provision of free healthcare services for Qatari citizens at public medical facilities, and mandating private health insurance for residents, visitors, and tourists. The law will boost the domestic healthcare industry, make the private insurance market more competitive, and open it up to foreign investment. U.S. health insurance companies should consider Qatar.

Healthcare Digital Transformation: Qatar has rolled out an electronic health record system across its entire public health sector. The National Vision 2030 strategy and a dedicated e-Health strategy will drive further development of digital health technology. Focus will be placed on developing a regulatory framework for the governance of digital health, encouraging uptake, and leveraging big data analytics within healthcare.

How to *Unlock Opportunities* in the Middle East



Overview of Healthcare Opportunities in Jordan

- *Suzan M. Barbour, Commercial Specialist, U.S. Embassy in Jordan*

Jordan Health Sector Opportunities



- **Capital: Amman**
- **Population: 11 million**
- **Per Capita GDP: \$4,167**
- **GDP: \$45 billion (approx.)**
- **Bilateral Trade: \$6.3 billion (2022)**
 - **U.S. Exports to Jordan: \$2.4 billion**

Why Do Business in Jordan?



Strategic Relationship + U.S.-Jordan Free Trade Agreement

Demand for Imports

High Regard for U.S. Products

Political Stability

Regional Leader in Medical Services

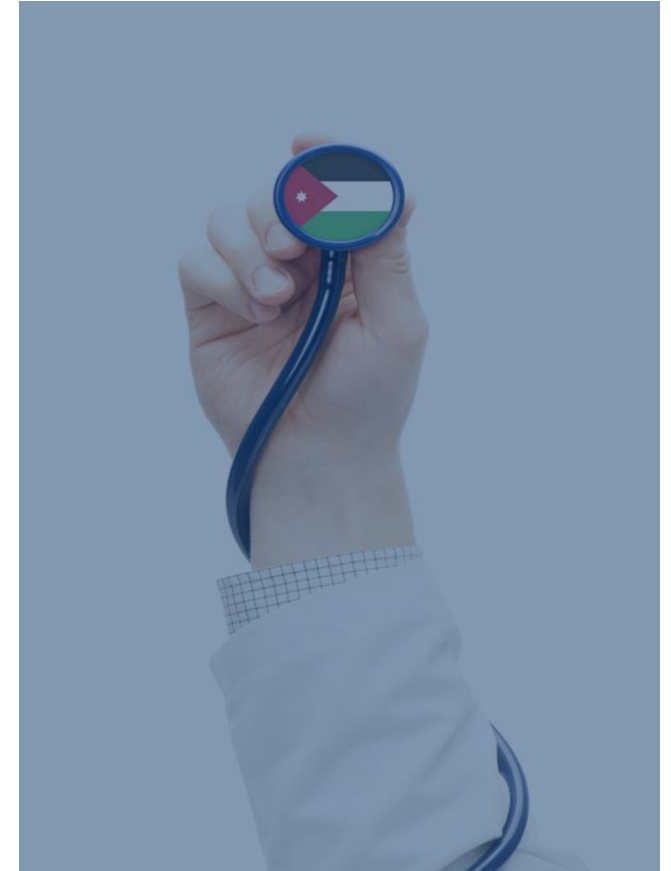
Skilled Healthcare Talent

Rapidly Growing Healthcare Sector

Jordan Healthcare/Medical: Facts & Stats

Facts and Statistics

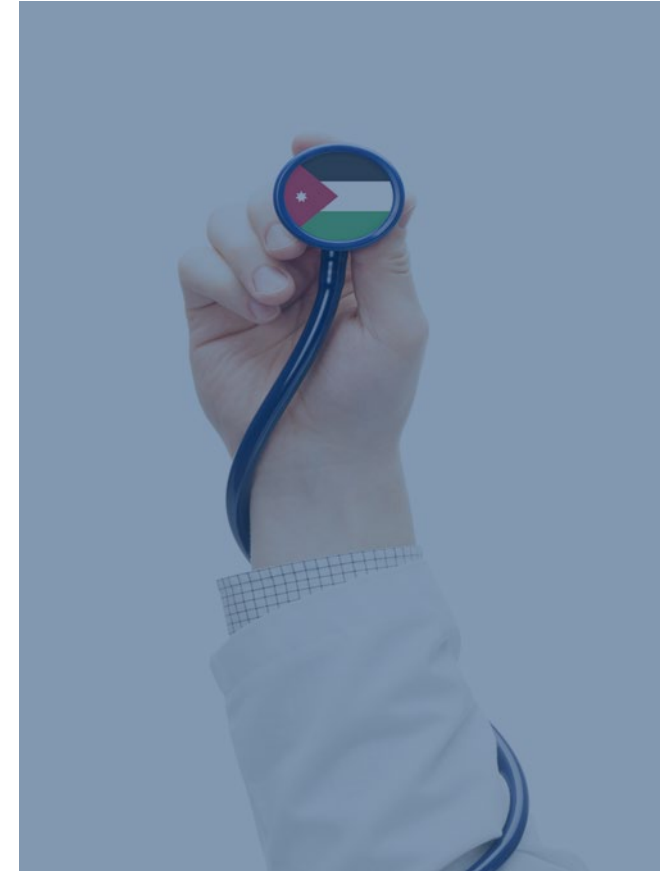
- Healthcare expenditures are 9% GDP
- 86% of population is covered by insurance
- 122 hospitals (70 of which are private)
- U.S. exports of pharmaceuticals and medical equipment are around \$60 million



Jordan Healthcare/Medical: Market Drivers

Market Drivers

- **Chronic Diseases:** diabetes, cancer, arthritis, heart disease, etc.
- **Medical Tourism:** patients from other countries in the region
- **Hospital and Private Clinic Project**



Jordan Healthcare: Leading Sub-Sectors

Leading Sub-Sectors (Products)

- Cardiology and cardiovascular surgery
- Laparoendoscopic surgery
- Kidney transplantation
- Ophthalmology
- Neurosurgery
- Orthopedic & Prosthetic Appliances
- Equipment & supplies for plastic surgery
- Oncology
- Consumables for Clinical laboratories
- Medical x-ray, Alpha, Beta, Gamma Ray
- Infertility and family medicine
- Plastic Surgery

Jordan Healthcare: Leading “IT” Technologies

Leading Sub-Sectors – IT Technologies

- E-Health
- Integrated medical insurance solution
- Medical device and equipment
- Customer relations managements
- Mobile healthcare applications
- Online medical content providers



Jordan: Upcoming Healthcare Opportunities

**University
Hospital
Project**

**KHCC
Pediatric
Tower**

How to *Unlock Opportunities* in the Middle East



Overviews of Healthcare Opportunities in the UAE and Kuwait Markets

- *Vandana Nair, Commercial Specialist, U.S. Consulate in Dubai*

UAE Health Sector: Opportunity Oasis

- With an **economy of \$503 billion**, a population of 11 million, the U.A.E. healthcare sector is expanding rapidly.
- UAE health expenditures are forecasted to grow from an estimated \$21 billion in 2021 to **over \$29 billion by 2029**.
- The UAE enjoys world-class facilities with branches of the **Cleveland Clinic, the Mayo Clinic, and Johns Hopkins**. A new hospital district will be built in Sharjah by 2027 with support from a consortium led by **Mass General and Dana Farber**.
- Decree 321 made the **UAE the first in the region** to provide a data exclusivity period of 8 years to protect patent rights.
- The UAE is a **regional medical tourism hub**, like a magnet attracting patients from the broader Africa region.



وزارة الصحة ووقاية المجتمع
MINISTRY OF HEALTH & PREVENTION



UAE Health Sector Growth Trends

- **Medical Devices:** Hospitals prefer to have cutting-edge versions of devices and diagnostic equipment.
- **Telemedicine:** Investment & use grew during the pandemic and regulations have been made more supportive.
- **Pharmaceuticals:** Drug and device prices in the UAE are 20 – 40% higher than in other countries in the region.
- **Health Data:** 2021 Ministerial Decree facilitates use of health data, both personal and anonymized data.
- **Clinical Research:** UAE Government aims to support clinical trials, including via the Emirati Genome Project.

Kuwait Health Sector Opportunities

Ministry of Health is the Largest Consumer & Service Provider (82% Market Share)

- Demand for high-end U.S. products growing with MOH 2021/2022 budget up by 12.93%.

Public Private Partnership Projects, Private, and Government Sectors See Growth

- Medical devices, equipment, & consumables.
- Instruments and reagents for diagnostic testing and laboratory research.
- Pharmaceutical sector sees stable market demand and steady growth.

Sending Patients Abroad

- Kuwait mainly sends patients to the U.S., U.K., and France.
- In 2020, ranked 4th (after Canada, China & Mexico) in adult patients sent to U.S. for treatment.



وزارة الصحة
Ministry of Health



Kuwait Health Sector Opportunities

Healthcare Technologies

- In 2022 there were five public tenders for the MOH Healthcare Information System.
- Public Sector: Amiri Hospital chose Hewlett Packard's Aruba for a 2021 digitalization infrastructure project.
- Private Sector: Dar Al Shifa Hospital chose Cerner for a 2019-2021 implementation of electronic medical record system.
- PPP: Dhaman Hospitals signed a 2021 agreement with InterSystems for a Unified Electronic Medical Record system

Healthcare Management

- Recent projects: In December 2019, Seoul National University was selected to operate the new \$1.18 Billion, 1,234 bed Jahra Hospital. It was constructed in 22 months and began to operate in January 2022.



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Closing Remarks

- *Mark Kilimnik, Healthcare Global Team, U.S. Dept. of Commerce*



Leverage the Strength of the U.S. Government

- Meetings with the right partners
- Promotional events
- Better market access
- Tips to avoid common pitfalls
- Market intelligence
- And more!



The U.S. Commercial Service: Here to Help!

Our Services for YOU

- **Initial Market Check:** Feedback from local potential distributors and partners on U.S. company products or services to gauge interest levels and market potential.
- **International Partner Search:** Provides a list of up to five partners/distributors that have an interest in the client's goods/services and optional virtual meetings.
- **International Company Profile:** Provides U.S. companies with a comprehensive background report on a specific foreign company.
- **Gold Key Service:** Provides U.S. companies with matchmaking appointments with up to five interested partners in a foreign market.
- **Single Company Promotion Service:** Provides a U.S. firm with a promotional event (such as a seminar, press conference, luncheon, dinner, cocktail reception).

Contacts for CS Middle East Healthcare Team



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The U.S. Commercial Service: Ready to HELP YOU!

We are in 80 Embassies around the world and 106 cities across the U.S.

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China ▼

Western Hemisphere ▼

Middle East and Africa ▼

Asia ▼

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Each Region

<https://www.trade.gov/contact-us>