

9th GLOBAL HEALTH EXHIBITION · WEBINAR

Saudi Arabia Insights & Opportunities

A snapshot of the Kingdom's healthcare transformation, market growth, and investment landscape ahead of GHE 2026

DATES

26 – 29 October 2026

VENUE

Riyadh Exhibition & Convention Center, Malham, Saudi Arabia

Agenda

What we will cover in this webinar

01

Vision 2030 & Health Targets

The Kingdom's ten-year transformation framework and its core health-related ambitions

02

Achievements to Date

Where Vision 2030 has delivered impact on lives, the economy, and the health system

03

Health Sector Priorities

MoH's role as super-regulator and the four strategic objectives shaping the sector

04

The Saudi Healthcare Market

Market size, growth, segments, and the most attractive investment opportunities

05

Regulatory Readiness & Incentives

How the Kingdom de-risks investment and supports investors end-to-end

06

Global Health Exhibition 2026

What to expect at the 9th edition

Vision 2030: A national framework with health at its core

Three pillars guide the Kingdom's ten-year transformation — each carries explicit health-related ambitions

A Vibrant Society

Healthy lives, quality of life, vibrant culture

KEY HEALTH-LINKED TARGETS BY 2030

- ✓ Average life expectancy from 74 to 80 years [1]
- ✓ Rank 3 Saudi cities among the world's top 100 [1]
- ✓ Daily physical-activity prevalence from 13% to 40% [1]
- ✓ Social Capital Index ranking to 10th place [1]

A Thriving Economy

Diversification, opportunity, private sector growth

KEY HEALTH-LINKED TARGETS BY 2030

- ✓ Private sector share of healthcare from 25% to 35% [2]
- ✓ Non-oil exports to 50% of non-oil GDP [1]
- ✓ FDI as % of GDP from 1.3% (2016) to 5.7% [1]
- ✓ Unemployment among Saudis to 7% [1]

An Ambitious Nation

Effective government, engaged citizens

KEY HEALTH-LINKED TARGETS BY 2030

- ✓ Top 5 globally on the E-Government Survey Index [1]
- ✓ Non-profit GDP contribution to 5% [1]
- ✓ 1 million annual volunteers by 2030 [1]
- ✓ Household savings of total income to 10% [1]

Sources: [1] Saudi Vision 2030 official targets · [2] Ministry of Health × Ministry of Investment Strategic Alignment, April 2026

A decade of impact: Vision 2030 achievements at the ten-year mark

Targets met early, exceeded, or on track — with the health sector delivering some of the strongest gains

 **\$1.1T+**

Real GDP, with non-oil activities now > 50% of the economy [1]

 **7.0%**

Unemployment rate among Saudis — Vision target hit ahead of schedule [1]

 **5.7%**

FDI as % of GDP, up from 1.3% at Vision launch in 2016 [1]

HEALTH SECTOR IMPACT

79.7

Life expectancy in 2024, up from 74 in 2016 — within reach of the 80-year target [1]

-40%

Reduction in deaths from non-communicable diseases, exceeding the UN target [1]

-60%+

Reduction in road-accident deaths, exceeding the WHO target [1]

97.5%

Population coverage with health services by end of 2025 [1]

70%

Of cancer cases now detected at early, more treatable stages [1]

85%

Pre-marital genetic-counselling response rate (up from 15% at baseline) [1]

+50%

Growth in clinical trials in H1 2025 vs. H1 2024 [1]

16

Saudi cities certified by WHO as Healthy Cities — most in the region [1]

Sources: [1] Vision 2030 Annual Report 2025

Health sector priorities: MoH as super-regulator and strategic leader

Four strategic objectives drive how the Ministry shapes the sector and the investment ecosystem

FROM PAIN TO HOPE

A shift in the model of care

The Health Sector Transformation Program moves the system from treating illness toward preventing it — investing in hope rather than pain.

Treatment → **Prevention**

Sickness care → **Wellness**

Provider-centric → **Person-centred**

Public provision → **Public-private**

Private sector share of healthcare to rise from 25% to 35% by 2030 [1]

01



Orchestrate the ecosystem

Connect investors, researchers and entrepreneurs through events, workshops, and matchmaking on the SEHA platform. [1]

02



Create new markets

Provide support, incentives and regulations for emerging, disruptive technologies and care models. [1]

03



Custodian of health data

Develop trusted data assets (Nphies, Genomics Platform) and AI training datasets for innovation. [1]

04



Drive investment growth

Identify, package and promote high-potential opportunities and build investor-ready business cases. [1]

The Saudi healthcare market: largest in MENA, structurally attractive

Demand fundamentals and government commitment make the Kingdom a long-horizon healthcare investment case

INVESTMENT DRIVERS



Young, growing population

~32M people with 40% aged 15–34, generating sustained demand for care across the lifecycle. [1]



Modern infrastructure base

499 hospitals, 80,072 beds, 6,600 regulated provider organizations, backed by continued government investment. [1]



High NCD & genetic disease burden

Rising chronic-disease prevalence creates sustained, predictable demand for specialty and tertiary care. [1]



Gateway to MENA

Strategic position serving an underserved region — proximity to fast-growing emerging markets with limited capacity. [1]

MARKET AT A GLANCE

SAR 130B+

In major healthcare investments announced in 2025 — across hospital infrastructure, life sciences, and venture funding [1]

32M

Population

14.1M

Insured lives

499

Hospitals

80,072

Hospital beds

6,600

Regulated provider orgs

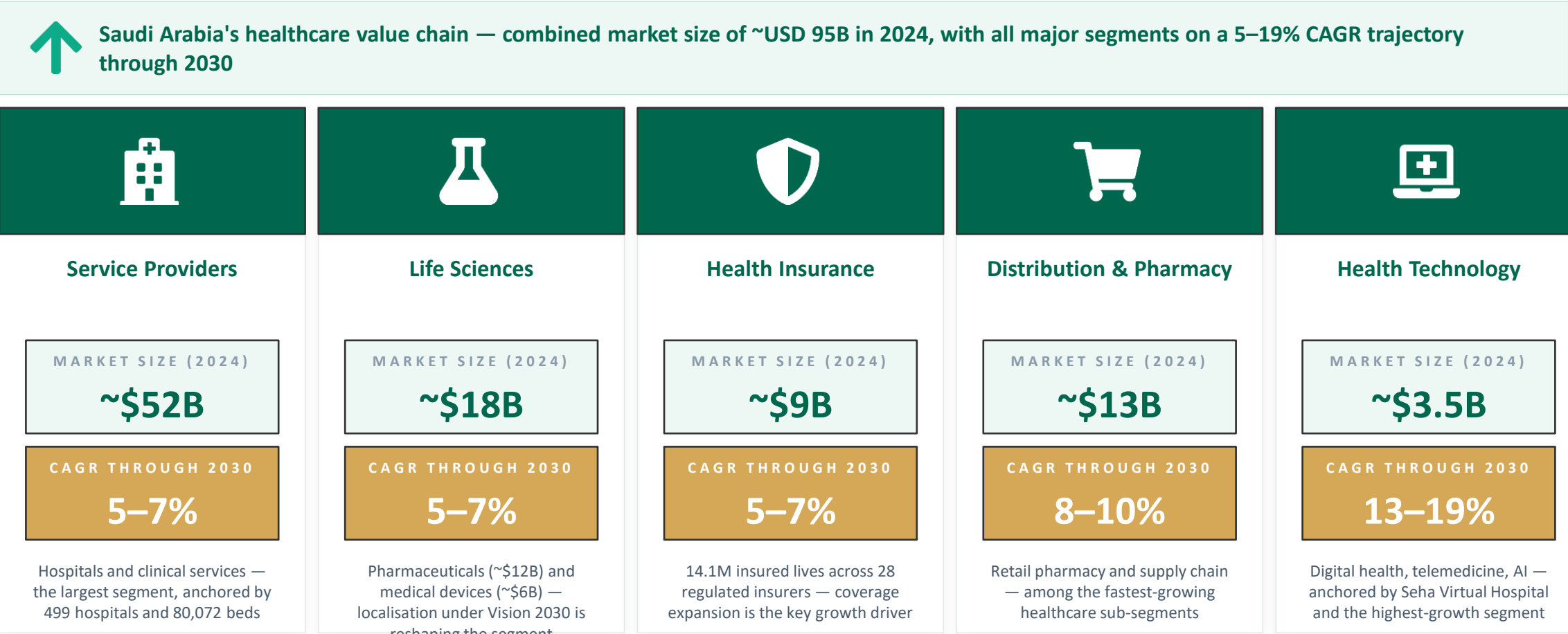
292M

Annual Nphies claims

Source: [1] Ministry of Health × Ministry of Investment Strategic Alignment, April 2026 (Local Healthcare Ecosystem data)

Healthcare segments: every part of the value chain is growing

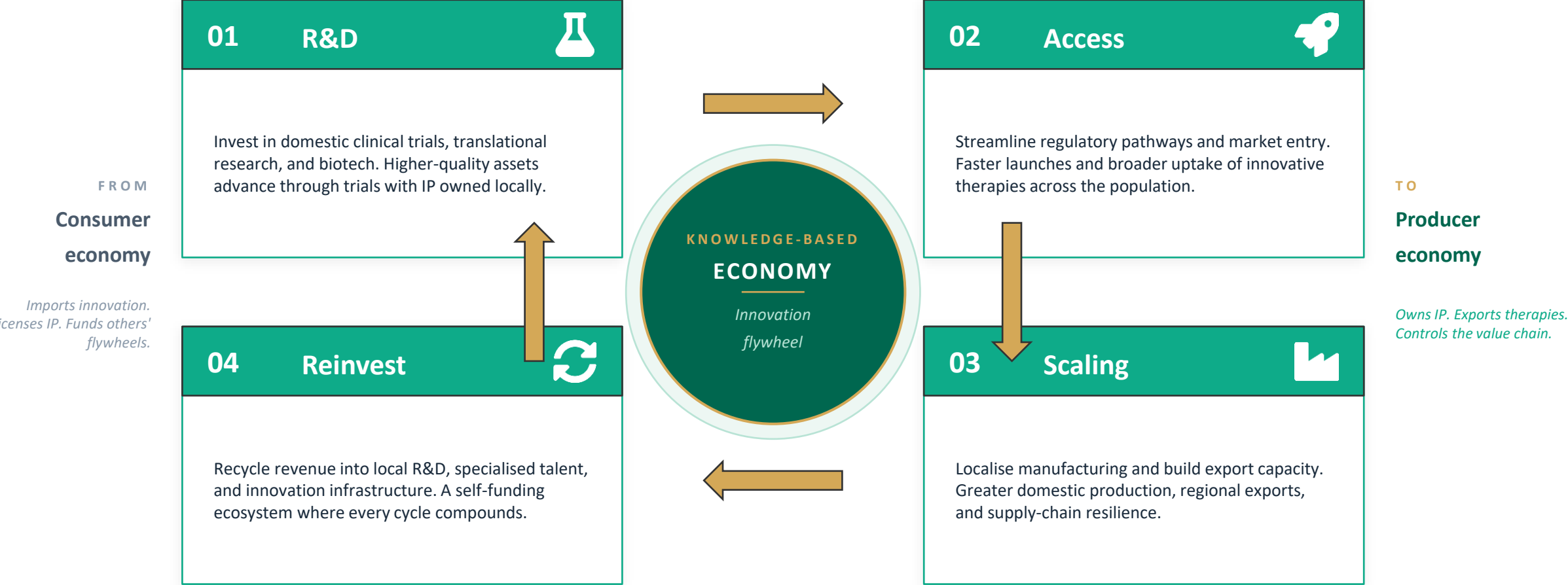
Service providers anchor the market; pharmacy retail and digital health show the highest growth trajectories



Sources: Mid-range estimates triangulated from independent market research, FY2024 baseline. [a] Service Providers: US-Saudi Business Council 2025; GlobalData (Marketline) 2024. [b] Life Sciences: Fortune Business Insights, Grand View Research, Coherent Market Insights, Future Market Insights (pharma); Expert Market Research, PS Market Research (medical devices). [c] Health Insurance: Mordor Intelligence 2025; IMARC Group 2024. [d] Distribution & Pharmacy: Grand View Research, IMARC Group, ResearchAndMarkets, BlueWeave Consulting. [e] Health Technology: Grand View Research, IMARC Group, PS Market Research, Globe Newswire (ResearchAndMarkets).

From consumer economy to producer economy: the health innovation flywheel

Saudi Arabia's healthcare investment thesis goes beyond consumption — the goal is a self-reinforcing engine of innovation, manufacturing, and reinvestment



Regulatory readiness: a de-risked path to market for healthcare investors

Government reforms, joint MoH–MISA coordination, and targeted incentives lower friction at every stage of investment

DOING BUSINESS — BASELINE REFORMS



24h

to issue a business visa [1]



100%

foreign ownership in most sectors, including healthcare [1]



24h

customs clearance period [1]

MOH × MISA COLLABORATION — THREE PILLARS

01

Accelerate the investor journey

Streamline regulatory pathways and reduce time-to-market [1]

02

Develop & promote opportunities

Identify, package and market high-potential investments [1]

03

Institutional integration

Cross-ministry coordination for seamless investor support [1]

ACCESS TO FINANCING

Export credit, financing, and guarantees

Provided by the Saudi Industrial Development Fund (SIDF), National Infrastructure Fund (NDF), International Islamic Trade Finance Corporation (IITFC), and the Saudi Export–Import Bank. [1]

Source: [1] Ministry of Health × Ministry of Investment Strategic Alignment, April 2026

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[TO BE COMPLETED]