



UNITED ARAB EMIRATES
MINISTRY OF HEALTH & PREVENTION



الإمارات العربية المتحدة
وزارة الصحة ووقاية المجتمع

“UAE’s Health and Pharmaceutical Economic Growth & Innovative Capacity”

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U.S-U.A.E Business Council Healthcare
Event



UAE Healthcare Market: the Strengths....



UAE has one of the most liberal trade regimes in the Gulf and attracts strong capital flows from across the region.



UAE is progressively diversifying its economy, which has reduced its vulnerability to oil price movements compared with other Gulf States



One of the more developed markets in the Middle East, with strong healthcare infrastructure and the highest per capita drug expenditure in the region.



Strong patented drug market, largely as a result of the country's preference for the latest medicines.



Local manufacturing industry activity has increased notably over the past few years, with a strong focus on regional and global exports.



Increase in population numbers, including expatriates, leading to significantly higher healthcare expenditure and flourishing trade market.

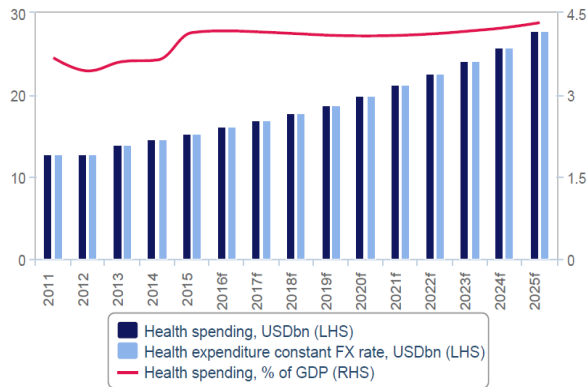


Healthcare Investment Forecast

2015-2025

Healthcare Expenditure Forecast

(2011-2025)



f = BMI forecast. Source: World Health Organization (WHO), BMI

- ✓ UAE's health expenditure reached a value of **AED56.26bn** (USD15.32bn) in 2015, equating to USD1,673 per capita.
- ✓ In 2016, health expenditure increased by **5%** in local currency terms, reaching **AED59.15bn** (USD16.12bn).
- ✓ It is forecasted to rise to **AED73.52bn** (USD20.03bn) by 2020, which translates to a compound annual growth rate (CAGR) of **5.5%**.
- ✓ Over the extended 2016-2025 forecast period, health expenditure is expected to rise to **AED101.94bn** (USD27.78bn), which equates to a CAGR of 6.1%
- ✓ The government's share of total health expenditure is expected to fall over our forecast period from **71.3%** in 2015 to **60.7%** by 2025, aligning with the strategy of PPP and private sector investment encouragement.





Facts & Figures: Healthcare Providers in UAE

Healthcare Personnel (United Arab Emirates 2010-2015)

	2010	2011	2012	2013	2014	2015
Physicians, total	12,632	12,708	13,987	16,037	16,669	26,711
Physician, per '000 population	1.52	1.45	1.56	1.77	1.83	2.91
Nurses, total	24,188	25,503	27,942	31,119	33,429	34,646
Nurses, per '000 population	2.90	2.92	3.12	3.44	3.68	3.78
Dentists, total	2,901	3,032	3,411	3,821	3,739	3,839
Dentists, per '000 population	0.35	0.35	0.38	0.42	0.41	0.42
Pharmacists, per '000 population	5,537	5,722	5,914	6,112	6,317	6,528
Pharmacists, per '000 population	0.66	0.66	0.66	0.68	0.70	0.71

Source: BMI Espicom

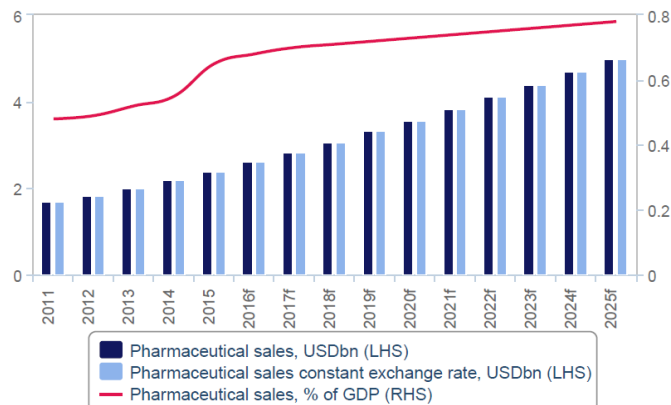
There is still a need for more Physicians, nurses and pharmacists; even with the current increase it is not keeping pace with shifts in Health Improvement Strategy for UAE.



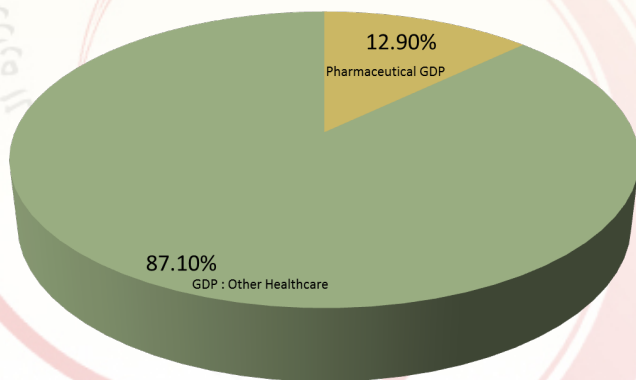
Pharmaceutical Market: The Updates

Pharmaceutical Market Forecast

(2011-2025)



United Arab Emirates Pharmaceuticals & Healthcare Report Q1 2017-
BMI : Business Monitor International



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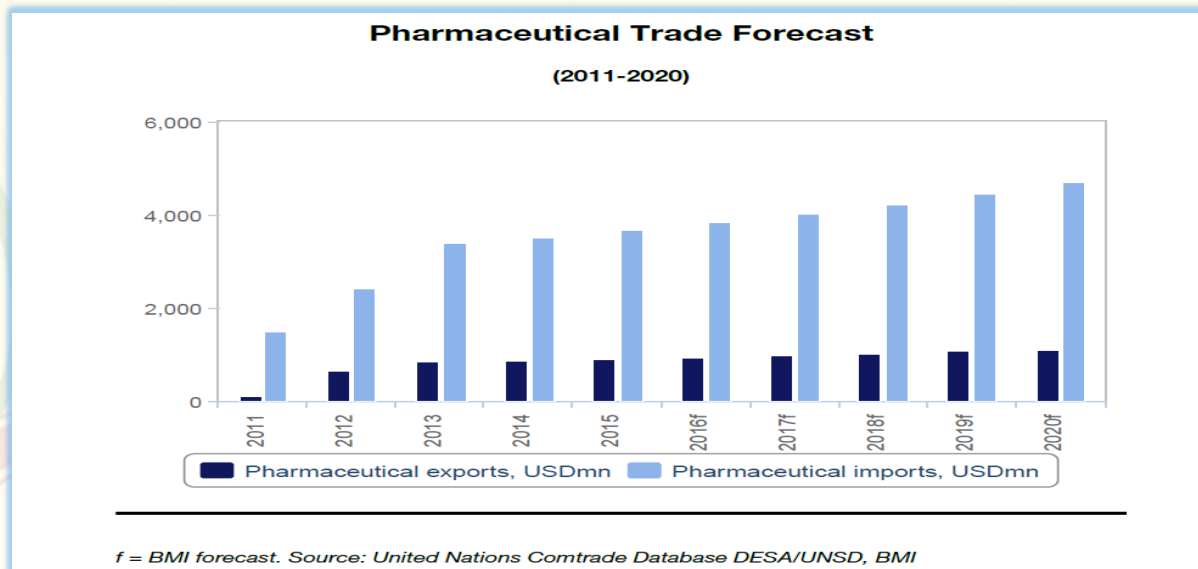
- ✓ In 2015, the UAE pharmaceutical market reached a value of **AED8.84bn** (USD2.41bn), representing 15.6% of healthcare expenditure.
- ✓ In 2016 the market reached a value of **AED9.61bn** (USD2.62bn).
- ✓ By 2020, it is calculated that drug expenditure will reach a value of **AED13.13bn** (USD3.58bn), equating to a compound annual growth rate (CAGR) of **8.2%**
- ✓ by 2025, drug expenditure will be worth **AED21.74bn** (USD5.92bn) driven by population growth, a changing disease profile, and the use of modern medicines such as biotechnology drugs.
- ✓ By 2025 the pharmaceutical market will make up **0.85%** of the UAE's GDP, up from 0.70% in 2015.

United Arab Emirates Pharmaceuticals & Healthcare Report Q1 2017-
BMI : Business Monitor International



Pharmaceutical Trade forecast

2011-2020



- ❖ Pharmaceutical imports and exports stood at **AED8.78bn** (USD2.39bn) and **AED3.37bn** (USD917mn) respectively in 2015.
- ❖ Imports will increase to **AED14.14bn** (USD3.85bn) by end 2016 and **AED17.30bn** (USD4.74bn) by 2020, at a compound annual growth rate (CAGR) of **5.1%**
- ❖ Exports expected to rise to **AED3.49bn** (USD950mn) by end 2016 and **AED4.14bn** (USD1.13bn) by 2020 - CAGR of **4.2%**.

- UAE imports pharmaceutical products from mainly 72 countries, 10 countries account for approximately 80% of the entire supply.
- These countries are predominately Western nations (namely the UK, Switzerland, Germany, Belgium, France, Spain, Italy USA and Australia) with the drugs comprising high-value patented products

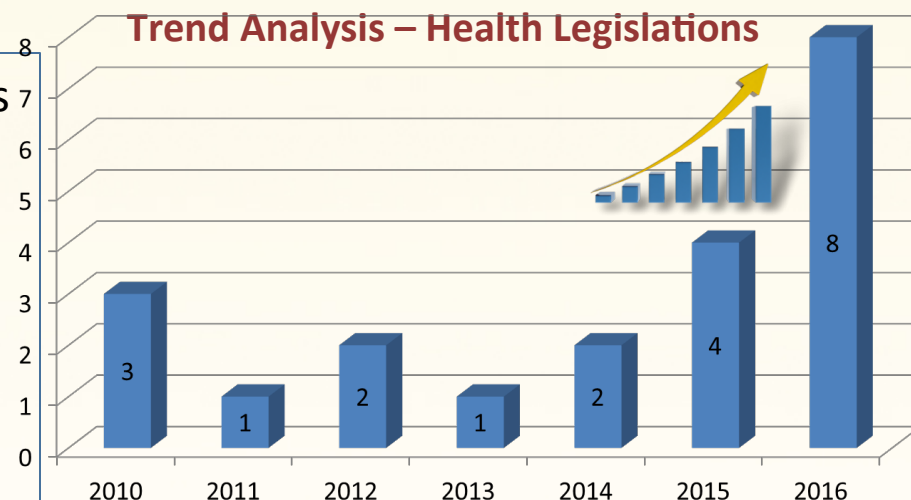
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MOHAP: Regulatory Continuum Legislations & Policies Development

MOHAP together with concerned stakeholders developed a number of legislations (Federal Laws and Decrees). Some examples include:

- Private Medical Health Facilities Federal Law No. (4) for the year 2015
- Medical Liability Federal Law (by Decree) No. (4) for the Year 2016
- Organ Transplant Regulation Federal Law No. (5) for the year 2016
- Communicable disease Control Federal Law No. (14) for the year 2014 and its Executive Decree No. (6) for the year 2016
- National Strategic Stockpile Decree No. (872) for the year 2016 and its Cabinet Executive decree



MOHAP
Website





MOHAP: Regulatory Continuum (cont.)

- Enhancing regulatory practices to ensure accessibility of a comprehensive quality health services to all population are at the top of UAE government agenda



- Licensing & Monitoring
the **3 Ps**:



Premises



Practices



Products

- The regulation of pharmaceuticals and medical technologies /devices in UAE is aimed to:





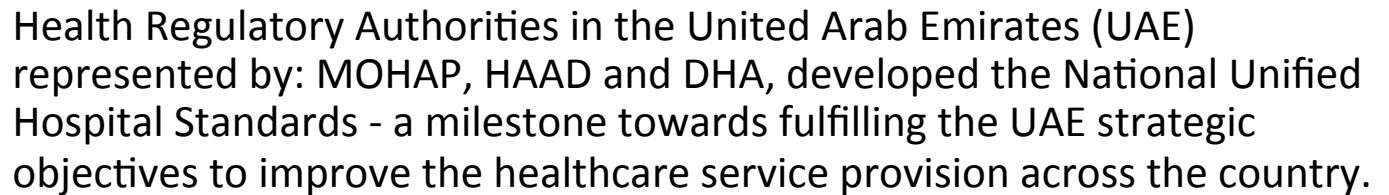
Professional' Qualification Requirements (PQR)



A unified guideline was developed by the Ministry of Health and Prevention , Health Authority – Abu Dhabi (HAAD), and Dubai Health Authority (DHA).

The document sets the professional qualification requirements necessary to license healthcare professionals in the UAE and transfer of license requirements across the Emirates.

Aligned with international standards, the document also identifies the minimum acceptable qualifications and experiences for eligibility for licensure to practice medical profession.

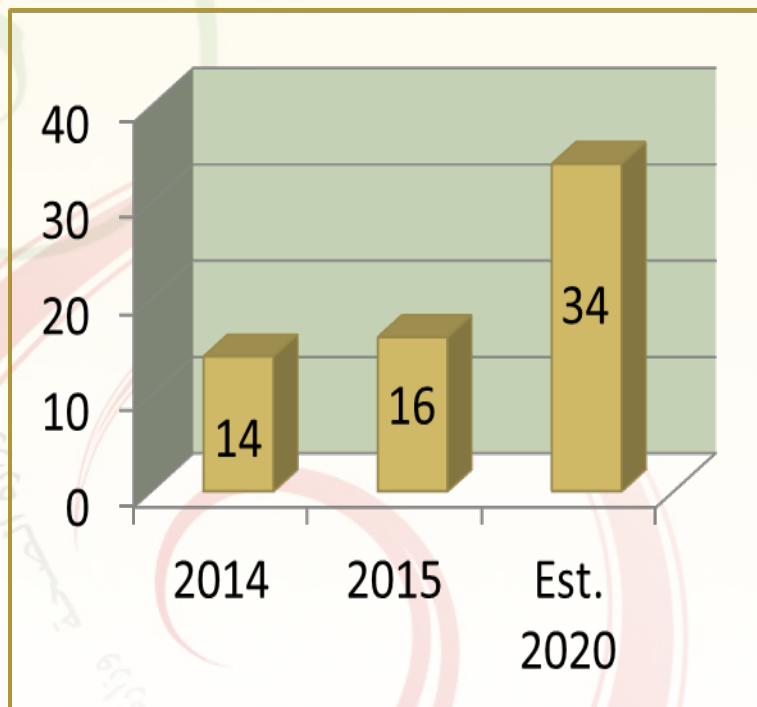


Scope: This regulation is applicable to all hospital establishments in the UAE that are subject to licensure. All categories of hospitals, inclusive of general and specialty including all governmental, semi-governmental and private along with hospitals operating in free zone areas excluding Dubai Healthcare City Authority shall comply with this regulation

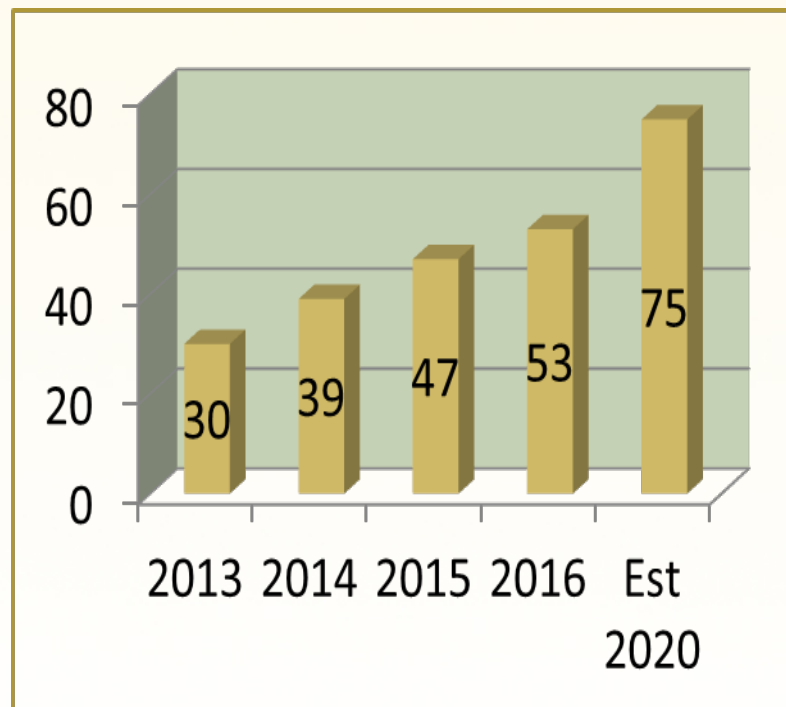


Progress of Pharmaceutical Industry in UAE

Pharmaceutical Factories



International Scientific Offices





Accessibility to New Therapies

- UAE is the only country in the MENA region that adopted an effective fast track system for registration of innovator drugs: **Fast Track Innovator**, which allowed quick access of innovator drugs to UAE patients & patients from neighboring countries who seek treatment in the UAE.

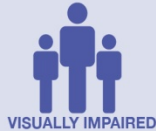
Examples of innovator drugs which were reviewed /registered in the UAE on fast track basis

Drug name	indication	Date of UAE Review/approval	UAE International rank for review/approval
ZYKADIA	Lung cancer	January 2015	Third
LEMTRADA	Multiple sclerosis	January 2015	Third
Keytruda	Melanoma	January 2015	Second
Cosentyx	Plaque psoriasis	February 2015	Fourth
Entresto	Heart failure	February 2015	Second
Praluent	Anti lipdemic	March 2015	Third
trulicity	diabetes	November 2014	Second
exviera	Hepatitis C	November 2014	Second
viekirax	Hepatitis C	November 2014	Second
Gazyva	leukemia	November 2014	Sixth
Olysio	Hepatitis C	June 2014	Fifth
Sovaldi	Hepatitis C	April 2014	Fifth
Harvoni	Hepatitis C	August 2015	Fourth
Tagrisso	Lung Cancer	May 2016	First
Gardasil	HPV Vaccine	May 2016	Second
Synjardy	Type 2 Diabetes	May 2016	Second

ADVANCED MEDICINE PACK

CHALLENGES

Medical needs of visually impaired people in the region



VISUALLY IMPAIRED

3.34% - 5.61%

prevalence of visual impairment in the Middle-East

Adherence to Medication Regime

- Clarity on dose intake
- Adherence linked to awareness on the disease



A UNIQUE SOLUTION

First of its kind **ADVANCED MEDICINE PACK** in the **MIDDLE EAST** region

- Only such pack in the world with **4 unique features** together
- Would be available for treatment of non-communicable diseases i.e. hypertension, diabetes, rheumatoid arthritis, asthma
- **10 products** with the advanced pack have been approved by the UAE MOH



NOTABLE FEATURES



HOPE
Capsules

Braille calligraphy

- Inscribed in both Arabic and Latin
- Avoid confusion between products for visually impaired patients



Medicine Intake Chart

- Illustration to clearly understand the recommendation of intake



QR code

- Access educational material in English, Arabic
- Get information on the causes of the disease and how to manage it through lifestyle tips



2D Datamatrix Technology

- Allows full traceability of products and automatic detection of falsified and expired goods
- Prevents counterfeiting of drugs



National Agenda Vision Focus on:

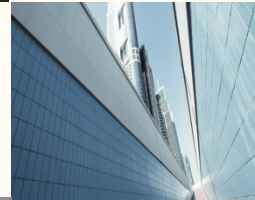
1) Safe Public and Fair Judiciary



2) First-Rate Education System



3) Competitive Knowledge Economy



4) World-Class Healthcare



5) Sustainable Environment and Infrastructure



6) Cohesive Society and Preserved Identity





وزارة الصحة

We want to be among the **best countries in the world by 2021**



With our Citizens at the heart of development, we strive to become one of the most competitive countries in the world”