May 2025. A snapshot of the sector.

# Digital Health and Medical Technologies in Africa
## Selected Markets Review

ACCIÓ Catalonia Trade & Investment

Generalitat de Catalunya
Government of Catalonia

CataloniaConnects

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**ACCIÓ**
**Generalitat de Catalunya**

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Barcelona, May 2025

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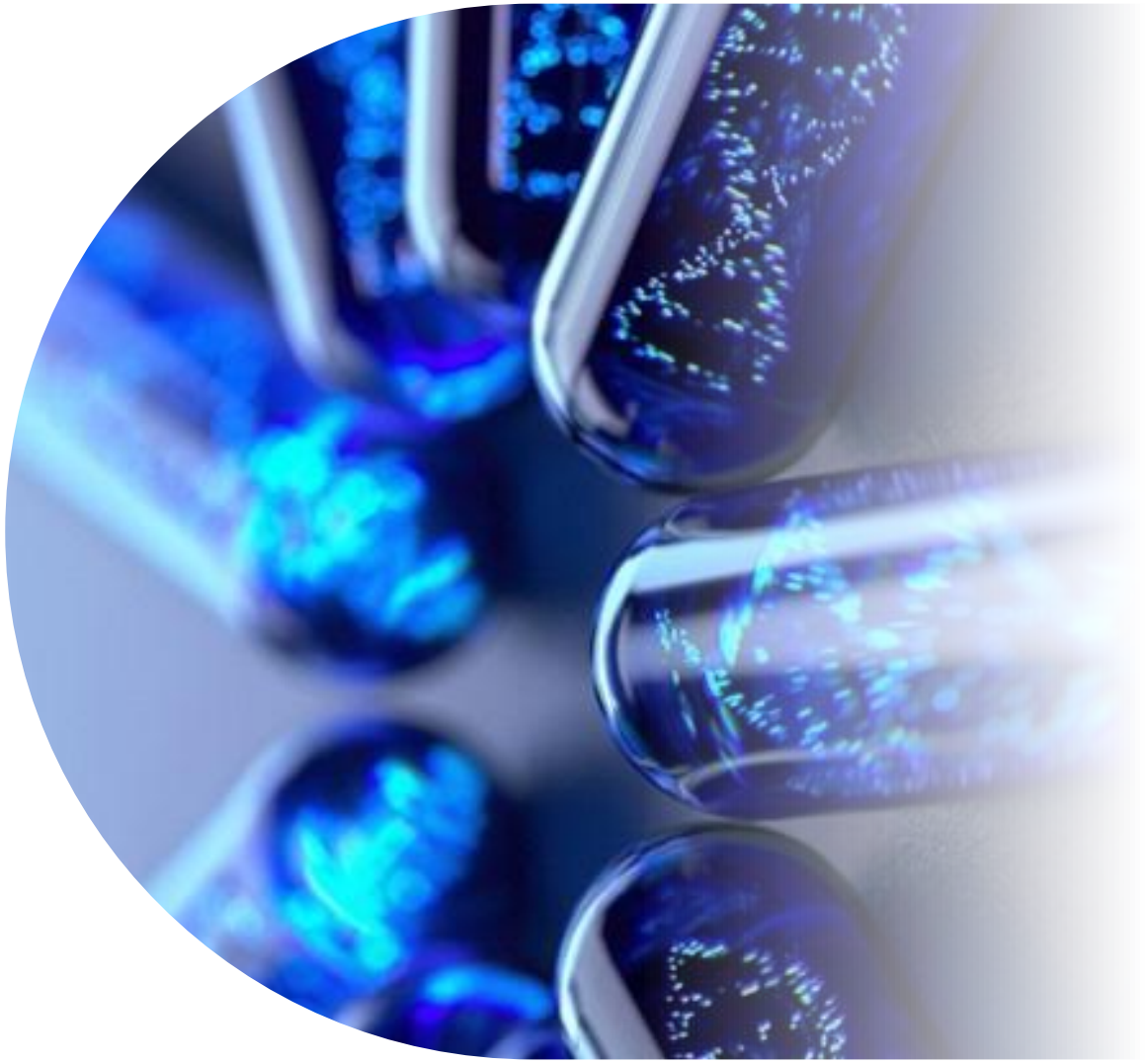
Our Team

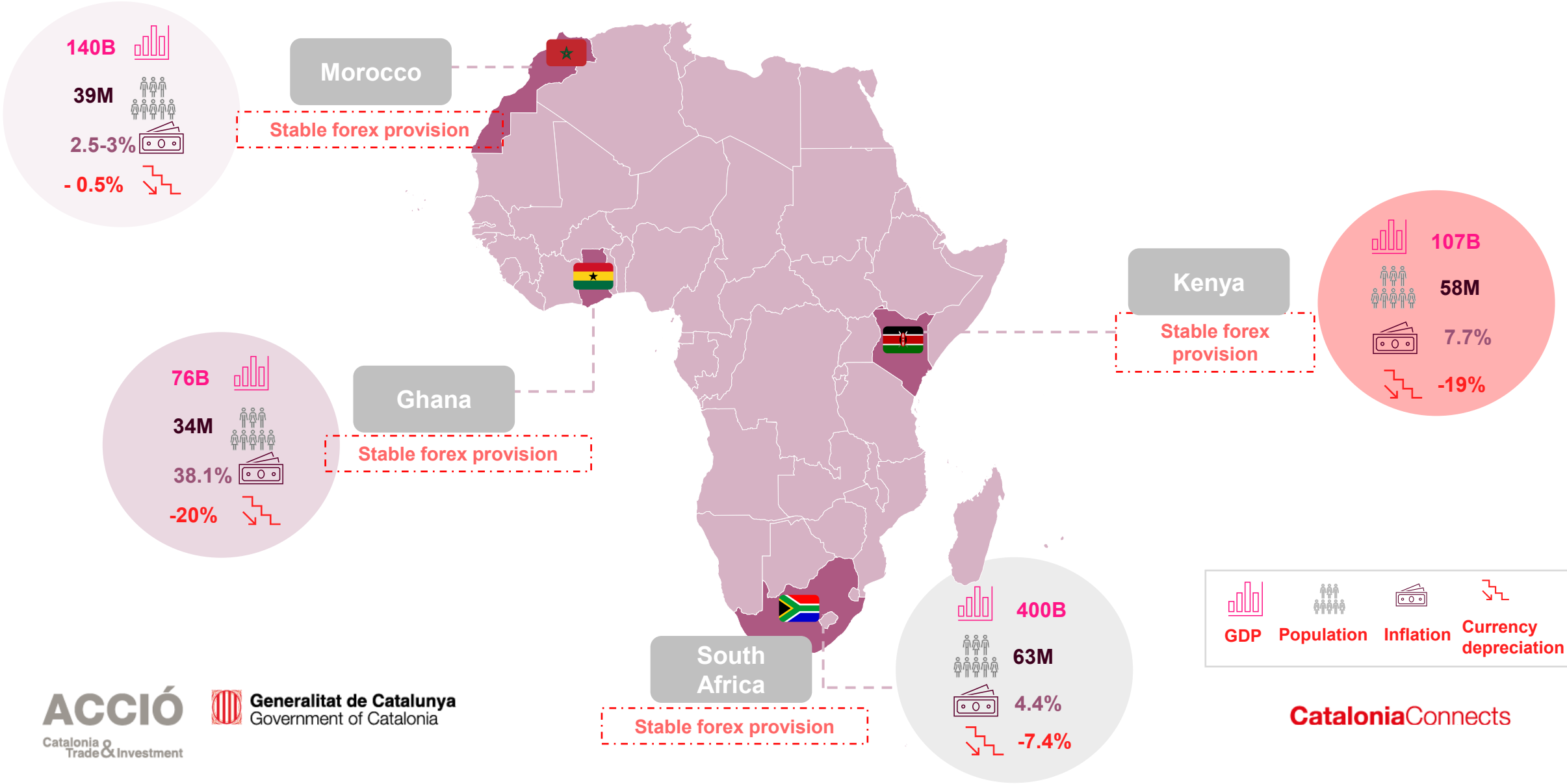



# 1. Africa Health Sector Indicators

# COUNTRIES OVERVIEW



**Macro-economic landscape, 2024**

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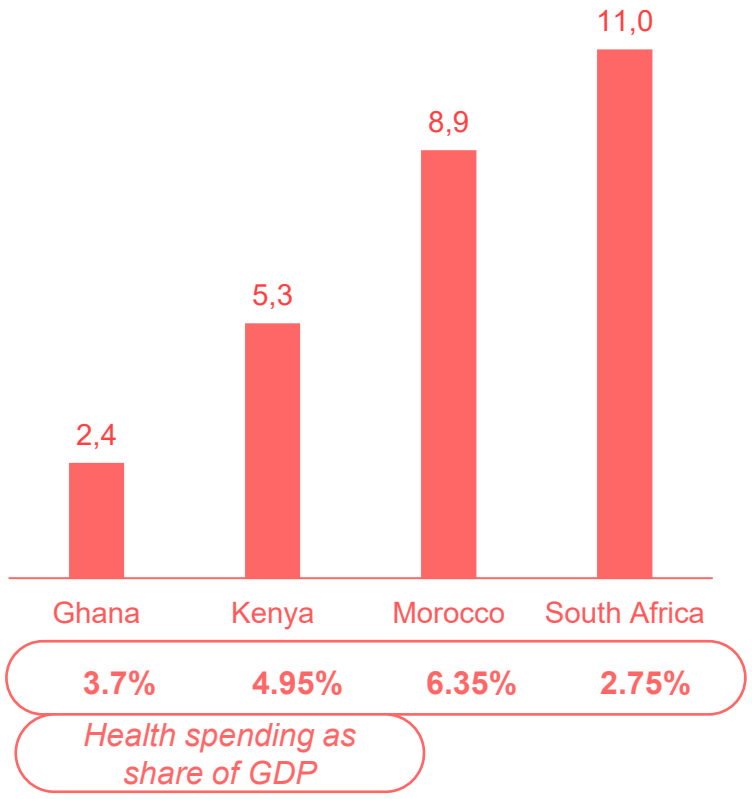
# HIGH LEVEL SPENDING SNAPSHOT

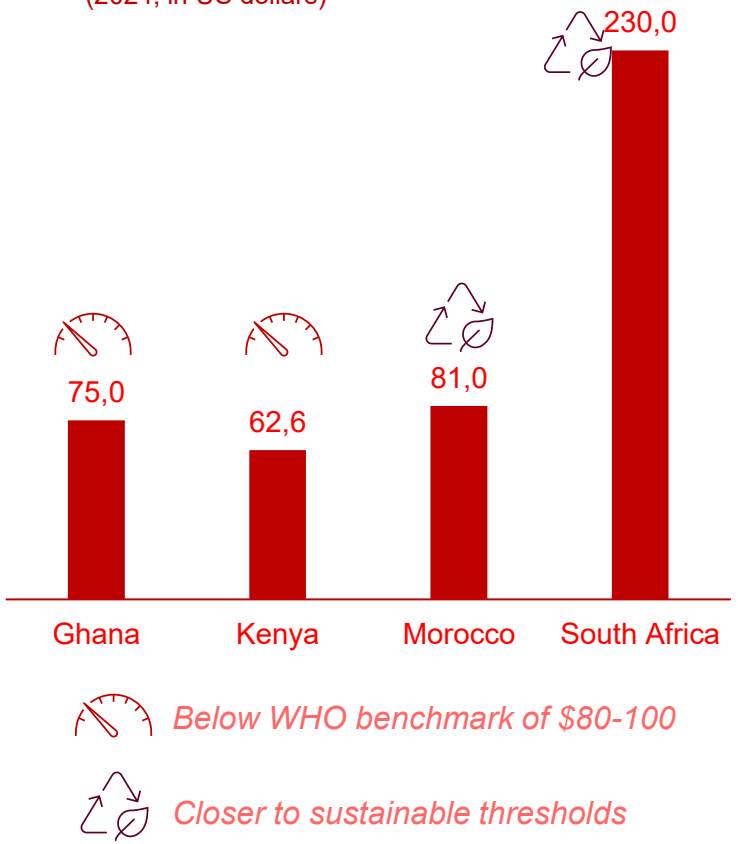


## Health Spending
(2024, in billions of US dollars)



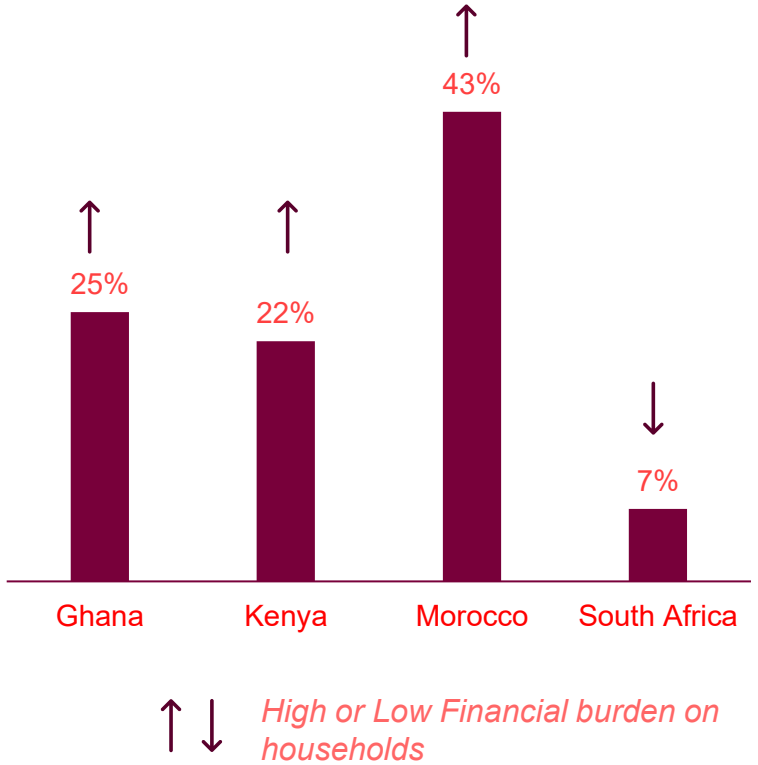

*Health Spending: "the total monetary resources used to provide health services, covering everything from household out-of-pocket payments to public funding from governments and social insurance"*

## Public Health Spending per capita
(2024, in US dollars)




*Public Health Spending per capita: "the total amount of public money spent on health services and products, divided by the population size"*

## Out-of-pocket spending
(2024, %of health spend)




*Out-of-pocket spending: "the direct payment made by individuals or households for healthcare goods and services at the time of use, which are not reimbursed by insurance or other third-party sources".*

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Sources: Statista and Official Records

# HEALTHCARE INFRASTRUCTURE & WORKFORCE



## Total Health Facilities

| Ghana | Kenya | Morocco | South Africa |
|---|---|---|---|
| 11,079 | 16,517 | 3,839 | +600 |

## Total Bed/1000hab

| Ghana | Kenya | Morocco | South Africa |
|---|---|---|---|
| 0.58 | 1.3 | 1.4 | 1.7 |

## Physician/1000hab

| Ghana | Kenya | Morocco | South Africa |
|---|---|---|---|
| 0.10 | 0.10 | 2.9 | 0.7 |

## Nurses and midwives/1000hab

| Ghana | Kenya | Morocco | South Africa |
|---|---|---|---|
| 1.2 | 0.6 | 1.0 | 1.0 |

## Internet & Electricity in Facilities

High Urban | Weak Rural

VS

Nationwide Stable

## Total Labs

| Ghana | Kenya | Morocco | South Africa |
|---|---|---|---|
| 500 | 106 | 753 | 233 |

# HEALTH OUTCOMES & SYSTEM PRIORITIES



## Ghana

- Main diseases and causes of death in Ghana are malaria (10%), stroke (8%), lower respiratory infections (8%), neonatal (8%), Ischemic heart disease (8%), HIV (7%), Tuberculosis (5%), Diarrhea (5%), Diabetes (3%), cirrhosis (3%) and others (35%).
- The total mortality rate is 7/1000, the maternal mortality rate is 485/0000 and child mortality rate is 33/000.
- Life expectancy is 63 years old.

## Kenya

- Leading causes of death: NCDs now dominate (~39% of fatalities), such as diabetes and hypertension. NCD's share of all death: Cardiovascular Diseases (~10–14%) , Cancers (~4–5%), Chronic Respiratory Diseases (CRDs) (~3–5%), Diabetes (~2–4%). Respiratory illness burden: ~19.6 million cases annually; COPD accounts for 1.7% of deaths. HIV prevalence: ~3.2% among adults; ~1.4 million people living with HIV in 2023.
- Maternal mortality ratio: 530 per 100,000 live births. Neonatal mortality: 18 per 1,000 live births. Under-5 mortality: 37.1 per 1,000 live births.
- Life expectancy at birth: 68.9 years

## Morocco

- The main cardiovascular diseases, cancer, diabetes, and chronic respiratory diseases account for 24% of deaths.
- 15,514 deaths per 1,000 live births.
- Maternal: 111.1 deaths per 100,000 live births.

## South Africa

- Leading causes of death: Communicable, maternal, perinatal and nutritional conditions now dominate (46.1% of fatalities), such as COVID-19 (278.7 per 100 000 people), Tuberculosis (95.4 per 100 000 people) and HIV/AIDS (77.9 per 100 000 people).
- Maternal mortality ratio: 118 per 100,000 live births. Neonatal mortality: 11-12 per 1,000 live births. Under-5 mortality: 26.1 per 1,000 live births. Respiratory illness burden: ~51 383 per 100 000 population. HIV prevalence:18.1% among adults; ~ 8.15 million people living with HIV in 2025.
- Life expectancy at birth 61.5 years

Sources: Statista and Official Records

# Trends in Health Demand & Perceptions on the Ground



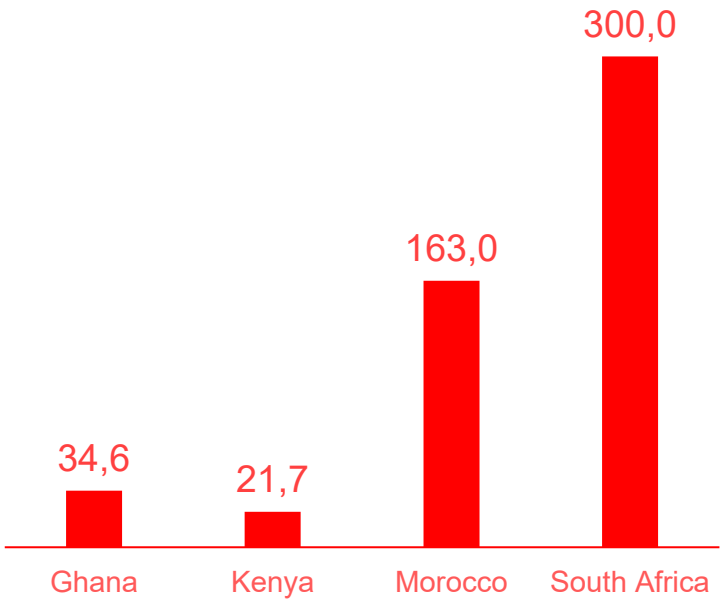
| | Key Health Structure Characteristics & Needs |
|---|---|
| **Ghana** | • Dual system: overcrowded, underfunded public vs. booming modern but costly private sector.<br>• Biggest challenge: shortage of doctors despite some return migration.<br>• Public & private seek affordable technology, training, and maintenance.<br>• Demand for: telemedicine, patient management apps, low-cost insurance, supply chain & counterfeit drug solutions. |
| **Kenya** | • 3-tier system: national government, 47 counties, and large private sector (~40%).<br>• Public system strained; private offers better care but affordability limits access.<br>• National push: UHC, reduce OOP spending, early NCD diagnosis, lab/diagnostic upgrades.<br>• Market gaps: affordable durable equipment, local maintenance & spare parts, consumables reliability, technician training. |
| **Morocco** | • Decentralized governance (regional health agencies).<br>• Strong focus on infrastructure renovation & expansion, especially rural.<br>• 1,400+ health centers rehabilitated (950 in 2025).<br>• Workforce expansion: 6,500 new positions planned in 2025 (vs. 1,500 in 2017).<br>• Expansion of mandatory health insurance.<br>• Mobile health units for rural access; incentive schemes for staff deployment.. |
| **South Africa** | • Growing demand from NCDs + HIV burden.<br>• Public facilities overstretched, under-resourced, inequitable (esp. rural).<br>• Only 30% of doctors serve public sector, yet it covers 84% of population.<br>• Key challenges: staff shortages, long waits, stock-outs, poor hygiene.<br>• New National Health Insurance (NHI) aims to unify system & improve access.<br>• Focus shifting toward preventive care & community-based solutions. |

# Consumer Healthcare Spending Pattern



## Consumer Spending per Capita

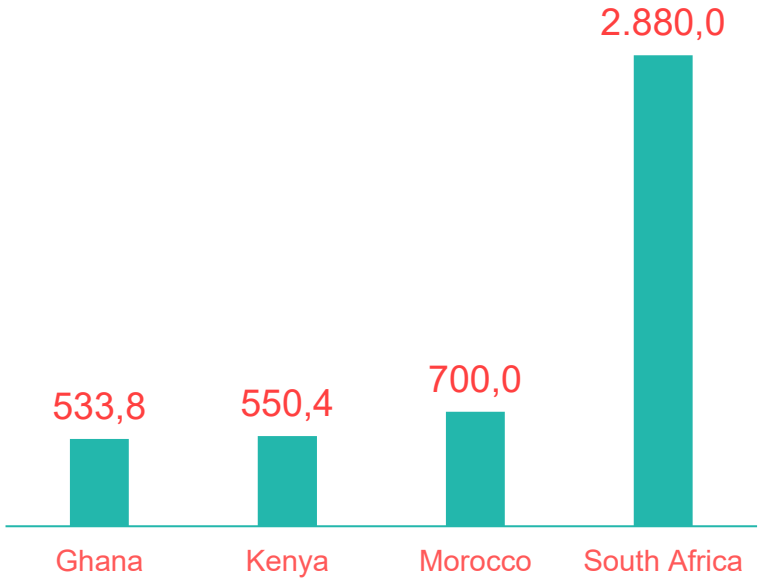
(2024, in US dollars)




South Africa and Morocco presented stronger household purchasing power, suggesting opportunities for more private services while Ghana and Kenya showed greater reliance on public or donor-funded healthcare.

## Consumer Spending on Medical Products, Appliances & Equipment

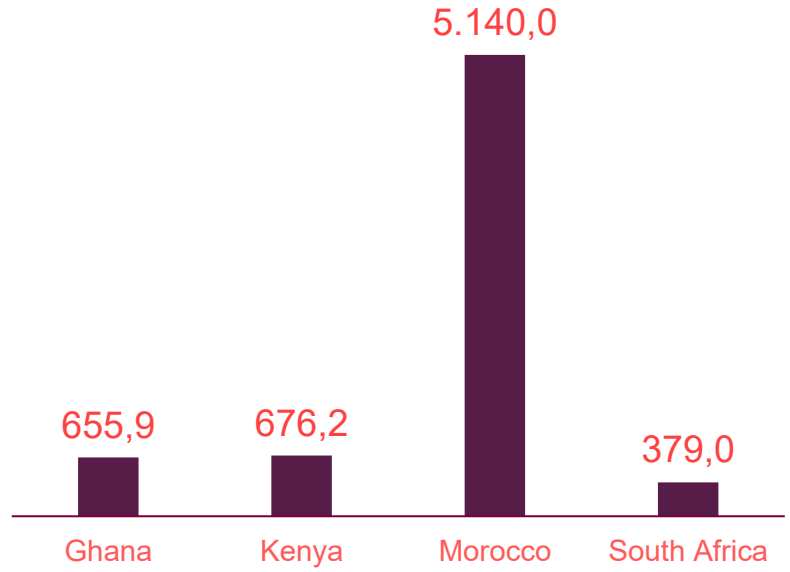
(2024, in million US dollars)




Ghana/Kenya/Morocco were emerging growth markets for affordable retail products and OTC supplies.

## Consumer Spending on Medical Services

(2024, in million US dollars)




Morocco showed the strongest medical services spending. Ghana and Kenya showed steady mid-level demand, while South Africa reflected an insurance-driven model with less direct consumer spending.

Source: ITC, 2024

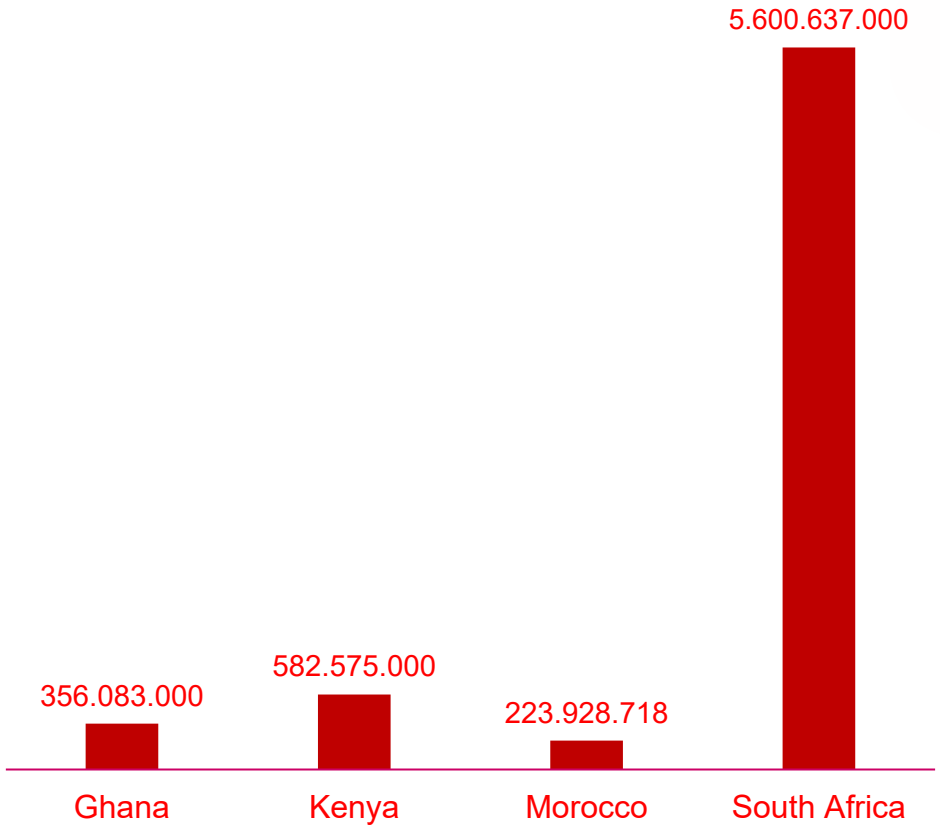
# 2. Med-Tech Sector Overview

# MED-TECH – EXECUTIVE SUMMARY



## Market scale, 8 HS Codes

(2020-2024, import value sum in US dollars)




Source: ITC, 2024

HS Codes: 841920, 9018, 9019, 9020, 9021, 9022, 9033, 9402

All four markets were **heavily import-dependent**, price sensitive at the lower end, and **split between** a **public tende**r-driven market and a **growing private segment demanding quality, service and after-sales.**

**Market scale (5-year import sums**): South Africa showed the largest import values; Ghana and Kenya showed distinct patterns (Ghana smaller but steady; South Africa high total health spend but imports dominated by tier-1 OEMs).

**Category priorities: High-value imaging & X-Ray** (HS 9022) **and medical instruments** (HS 9018) accounted for the largest import values; consumables/parts and furniture are lower-value but high-volume.

**Supply landscape**: Asia (China) dominated by volume/value for most HS codes; Europe supplied premium/high-tech lines; USA and selected other countries played niche roles

**Opportunities**: affordable imaging, diagnostics, capacity building (servicing, training), localized assembly for consumables, and value-for-money devices with strong after-sales support.

# MED-TECH – COUNTRY SNAPSHOTS – GHANA

## International brands with distribution in Ghana

## Local distributors in Ghana

## Ghana

- **Market size & trend**: Estimated 71.2 millions USD (consumables representing about 23.8 millions USD) per year. Smaller total import value but huge need for hospital & lab equipment. Dual public/private system with private expansion. Doctor shortages and uneven regional coverage. The local production is focused on consumables.
- **Composition**: Instruments and X-ray imports important; consumables and furniture steady. Procurement through central medical stores; tenders attract price competition.
- **Competitive landscape**: Many multinationals operate via local importers; market is price sensitive; some Spanish presence (Ibermansa).
- **Opportunity**: Lower-cost, robust equipment, financing/lease models, public-sector tender strategies and partnership for donor-funded projects. Emphasize maintenance & training. Catalan companies will have to adapt to the local context needs and purchasing capacity and/or follow the funding channels movements to introduce their technologies via support programs to the sector.

# MED-TECH – COUNTRY SNAPSHOTS – KENYA

International brands with distribution in Kenya

PHILIPS Healthcare

GE HealthCare

Local distributors in Kenya

Chemoquip

Laborex Cleaning technologies

medisel (KENYA) LIMITED

## Kenya

- **Market size & trend**: Estimated 197 million USD. Mid-sized and growing; public procurement (county and national) + private hospitals driving demand; clear push to modernize labs and imaging.
- **Composition**: High share of imports for instruments and imaging; demand for durable, lower-cost Asian brands in mid segment; European brands take premium imaging.
- **Competitive landscape**: Importers/distributors (example: Chemoquip, Laborex, Medisel) are gatekeepers; OEMs use distribution + local offices for high end products. Payment delays in public tenders and price sensitivity are common.
- **Opportunity**: After-sales service, local spare parts provision, training bundles. Private hospitals and labs expanding specialized diagnostic services, imaging, affordable diagnostic platforms and telehealth integrations.

# MED-TECH – COUNTRY SNAPSHOTS – MOROCCO

## International brands with distribution in Morocco

BMT MMM Group

McKESSON Empowering Healthcare

GE HealthCare

## Local competitors in Morocco

difmedi

Dislog group

Medi Global

Pharcomedic

## Morocco

- **Market size & trend**: Rapid growth (market value ~USD 615M in 2024, CAGR ≈ 9–10%), high import dependence (~90%). Large consumer/patient spending on services (previous note).
- **Composition**: Strong demand across imaging, surgical instruments, and mechanotherapy; private and public modernization drives imports.
- **Competitive landscape**: Multinationals (Siemens, GE, Philips, Medtronic) present; local players focus on distribution and consumables (Promamec, Difmedi, Mediglobal). China + Europe dominant suppliers.
- **Opportunity**: Private hospitals and AMO expansion create demand for mid-range imaging, diagnostics, lab equipment and turnkey projects. Local partners and training/maintenance offerings are essential. Competitive workforce, strategic geographic location, developing industrial infrastructure, accessible public-private partnerships, access to financing via invest.

# MED-TECH – COUNTRY SNAPSHOTS – SOUTH AFRICA

International brands with distribution in South Africa

Medtronic

PHILIPS Healthcare

GE HealthCare

Local distributors | manufacturer in South Africa

TiTaMED
MEDICAL DEVICE MANUFACTURE

CapeRay

CRPM
CENTRE FOR RAPID PROTOTYPING AND MANUFACTURING

MEDHOLD™
People. Products. Partnerships.

## South Africa

- **Market size & trend**: Largest health spend overall and sophisticated private market; heavy import reliance (80–90% of devices). Strong push for local manufacturing via MedTech Master Plan and NHI policy signals.
- **Composition**: High-value imaging/equipment dominated by tier-1 OEMs; consumables and furniture partly local. Public procurement via tenders. Private sector values performance & brand.
- **Competitive landscape**: Global OEMs often with subsidiaries; strong distribution networks; regulatory complexity (SAHPRA) but good after-sales expectations. Growing local R&D & startups.
- **Opportunity**: Digital Health & Telemedicine Boom – Strong growth in telehealth, remote diagnostics, and mobile health driven by rising demand for accessible care in rural/underserved areas. AI/diagnostics and servicing contracts.

# MED-TECH – CATEGORY ANALYSIS (TOP HS CODE HIGHLIGHTS)

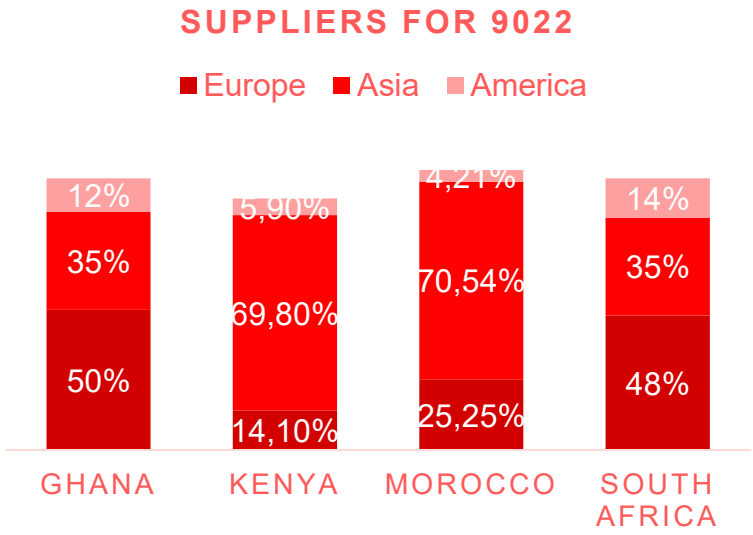


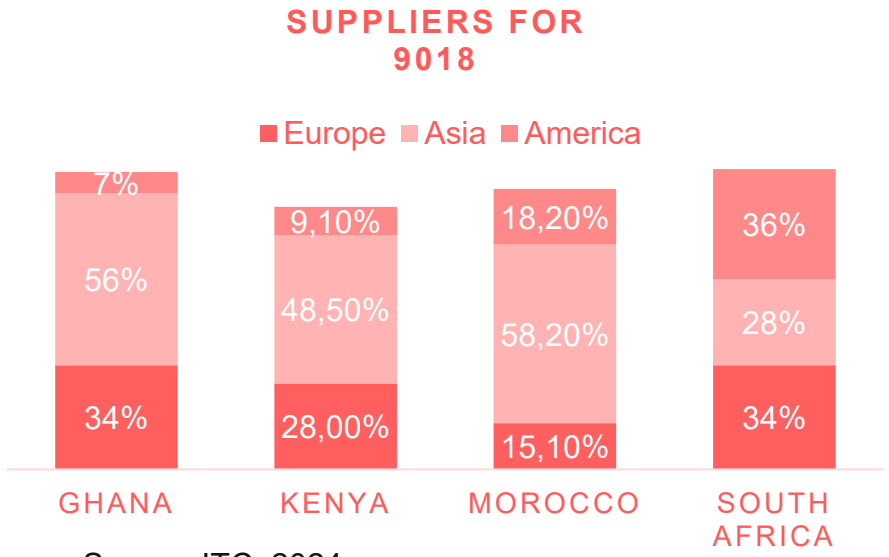
**HS 9022 (X-Rays / imaging)**: Across the 4 markets, this category of products had the highest value imports and premium suppliers from Europe and China dominated. The category presented higher entry barrier (regulatory, training) but large payoff in private hospitals and diagnostic chains.

**HS 9018 (surgical & medical instruments):** category of product with the largest volumes in many markets. A mix of mid-range Asian suppliers and premium European brands. Price sensitivity means competition on cost, quality and warranty.

**HS 9019 / 9020 (mechano-therapy & breathing appliances):** Important values in all markets signaling strong demand in rehabilitation and respiratory care. Regional suppliers from China/Asia common.

**HS 9033 (parts & accessories) & HS 9402 (medical furniture):** Lower value but high volumes in many markets. These categories can have steady aftermarket demand for spare parts, consumables and furniture creating recurring revenue streams.




Source: ITC, 2024

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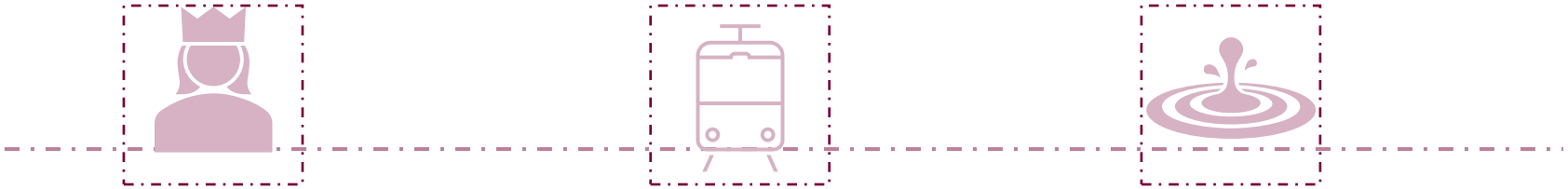
# MED-TECH – VALUE-CHAIN & BUYING BEHAVIOR



## Cross-market patterns



**Primary channels:** local importer-distributors who manage customs, regulatory clearance, installation and after-sales. Large hospitals occasionally import directly for specific tenders.

**Public procurement:** price-sensitive, tender-driven, and can involve payment delays. Tenders favor established suppliers but are attractive for large ticket orders. Availability and reliance on multilateral fundings for public procurement. Funding cuts from the dismantling of USAID had strongly hit the med-tech sector across Africa.

**Private procurement:** prioritizes reliability, brand, installation and training — more receptive to bundled services.

# 3. Health-Tech Sector Overview

# HEALTH-TECH – MARKET SIZE & PENETRATION



Morocco and South Africa are scaling fastest, Kenya is strong in private-led innovation, and Ghana is small but fast-growing.

**Ghana**: The market is supported by government initiatives to spread digitalization across the healthcare sector. The **total health tech sector revenue at 131 million USD** with 19% annual growth: 41% represents digital treatment and care, 55% digital well-being and 6% telemedicine and online doctors, consultants.

**Kenya**: Total market revenue of the health tech sector is estimated at **338 million USD.**
Strong EMR penetration in private hospitals (60%+ adoption), slower in public sector. Telemedicine emerging (e.g., MyDawa), mobile health widely used (M-Tiba, DHIS2, mUzima). Significant untapped potential.

**Morocco**: Market size is estimated at **737 million USD. Growth of the sector is estimated at 15–20%** and the potential creation of 5,000 to 7,000 jobs over the next five years. Strong public-private investment in EMR, telemedicine (mobile units), and national health data. Key areas are Electronic medical records, Online appointment systems and Teleconsultation platforms.

**South Africa:** South Africa's eHealth sector is expanding steadily, driven by strong mobile and internet access. Platforms like MomConnect have achieved nationwide reach, especially in maternal care. Key achievements include reaching over 4.7 million users, with 95% of public clinics registering mothers onto the platform. Telemedicine and digital health tools are gaining traction in both public and private settings, offering new ways to deliver care remotely. While electronic medical records are used in many private hospitals and some public facilities, adoption remains uneven.

# HEALTH-TECH – COMPETITIVE LANDSCAPE



**Ghana**: Dominated by diaspora-founded startups (**mPharma, Talamus, ClaimSync**). Partnerships with India, Europe, US. International presence: **Zipline** (drone delivery), **Top Doctors, Medoc**.

**Kenya**: Strong local entrepreneurship (**AfyaRekod, Totohealth, Tibu Health, Zuri Health, Ilara Health**). Mix of local + international (**M-Tiba** backed by Gates Foundation, **Ada Health** from Germany). Innovation is locally grounded.

**Morocco**: Diverse local startups (**DabaDoc, DataPathology, DeepEcho, Sobrus**). **Akdital Group** expanding aggressively (largest private operator). International players (**Philips, Siemens, IBM Watson Health, Roche, Pfizer**) present through distributors & PPPs.

**South Africa**: HealthTech landscape combines global technological strength with local digital innovation (**GE, Philips, Medtronic, Siemens**). Local firms. across healthcare access, data management, and patient engagement (**Vula Mobile, HearX Group, RecoMed**)

# HEALTH-TECH – VALUE CHAINS & END-USERS

## Ghana

- **Supported by incubators, grants, and international funding**.
- Health tech B2C companies usually directly promote their platforms on apps shops.
- Health tech companies B2B usually work directly with a pool of hospitals and clinics. Some do use software integrators and distributors such as Medsoft and Ecube for example.

## Morocco

- **Public sector dominates (83% of services)** but private absorbs 58% of spending.
- Public-private partnerships growing.
- Focus area: significant investments in hospital infrastructure, EMR rollout, telemedicine for rural outreach.

## Kenya

- **Private sector leads (efficiency, branding, insurance claims).**
- Public sector dependent on donors, slower adoption but scalable.
- The main adoption drivers for private clinics are efficiency, revenue and client experience.
- Focus area: diagnostics, EMRs, and telehealth. Accreditation, insurance claims, branding for the mid-tier private hospitals. Quality of care, international affiliation drive adoption in the high-end private hospitals.

## South Africa

- **Dual system**, dynamic blend of local innovation and international participation. While global medical technology firms remain influential, a growing number of homegrown HealthTech companies are driving digital transformation across healthcare access, data management, and patient engagement.
- Focus area: Integrating digital health tools with insurance services, offering wellness programs, virtual care access. Healthcare booking platform, connecting patients with doctors, clinics, and pharmacies nationwide. Mobile health referral and communication app designed for healthcare professionals.

# HEALTH-TECH – TRENDS & OPPORTUNITIES

**Opportunities** for co-development include:

- AI driven diagnostics that can leapfrog traditional clinical bottlenecks and lack of Doctors, seamless NHIS and other local insurance private schemes integration,
- Last-mile Telemedicine and management systems targeting rural contexts.

**Challenges**:

- Drone delivery, mobile van consults, kiosks
- Connections with patients, world wide specialists,
- Management for clinics and hospitals adapted to local challenges, cross connections between innovators and other stakeholders.

**Opportunities**:

- Data systems & interoperability to link the different services,
- Stakeholders and payment methods all to provide a unified experience to the end users.
- Telemedicine and Remote Monitoring, Hospital Infrastructure & Automation, Bundled Diagnostic Solutions (for instance point-of-care diagnostic devices with digital platforms on lease or per-test payment models).

**Challenges**:

- Collaboration in these areas will have to look into joint funding opportunities for both the local and Catalan parties.

**Opportunities**:

- Over 12 billion MAD allocated for infrastructure—new hospitals, regional medical complexes—and enhanced healthcare access, especially in rural zones. A focus on digital health: priority investments in Electronic Health Records (EHR), telemedicine platforms, a national health data network, and AI-based diagnostic tools
- Public-private partnerships and tech platforms targeting rural access, AI diagnostics, and national health data interoperability. High-potential in health-tech startups, particularly in machine learning diagnostics, remote patient monitoring, and data-driven healthcare solutions.

**Challenges**:

- Data protection and cybersecurity laws enforcement.

**Opportunities**:

- Telemedicine and remote diagnostics are expanding, particularly in rural areas.
- Catalan companies can add value through partnerships focused on local assembly, servicing, and scalable digital platforms, supported by joint funding or PPPs.
- High-tech, reliable equipment and long-term service contracts.

# 4. Innovation & Star-up Ecosystem

# Startup Volume & Maturity



## Startup-led innovation with donor & incubator support

**Ghana:** Early-stage ecosystem (~150–200 health tech startups). Mostly local, socially driven ventures focused on last-mile care (e.g., mPharma, CowTribe, Talamus Health).

**Kenya:** Growing, vibrant scene (180+ startups). Strong innovation culture in EMR, telemedicine, AI, and logistics, supported by established accelerators (iHub, Villgro).

## State-led digital transformation

**Morocco:** Smaller in number but rapidly institutionalized: ~80 health-related companies with government-led data and AI initiatives. Emerging deep-tech ecosystem (UM6P, Technopark).

## Research-integrated innovation economy

**South Africa:** Advanced and capitalized: 46+ digital health ventures within a structured ecosystem tied to national R&D and commercialization programs (TIA, SAMRC).

# SUPPORT PROGRAMS & FUNDING INFRASTRUCTURE (I)

## Stakeholders and support programs in Ghana

- **NGOs:** Grameen Mobile Technology for Community Health (MOTECH) initiative, is a program developed by Grameen Foundation in Ghana to improve maternal and child health outcomes
- **Incubators:** Impact Hub, Mest-Meltwater, Kumasi Hive, Ghana Tech Lab, Ghana Innovation Hub.
- **Universities-linked incubators:** Accra Technical University Incubator Hub, Ashesi Health & Care Initiative Incubator
- **Multilateral donors**: Unicef Start-up lab  KOICA-UNICEF Accelerating Entrepreneurship and Innovation in Ghana
- Many initiatives are supported by **Development Finance Institutions** and cooperation agencies and are interconnected with international start-ups ecosystems to source for grants, funding and participate to innovation challenges.

As an example of cooperation with Catalonia, we can mention the case of Cow Tribe accelerated by Fledge Barcelona (hosted by Barcelona Plataforma Empresarial).

MOTECH
MOBILE TECHNOLOGY FOR COMMUNITY HEALTH

IMPACT HUB

GHANATECHLAB

KUMASI HIVE

GHANA INNOVATION HUB

mest
meltwater entrepreneurial school of technology incubator

KOICA
Korea International Cooperation Agency

unicef
for every child

# SUPPORT PROGRAMS & FUNDING INFRASTRUCTURE (II)

## Stakeholders and support programs in Kenya

- **Innovation hubs and incubators:** iHub Nairobi supports early-stage digital entrepreneurs. Continues to offer mentorship, networking, co-working space, and investor access. Nailab offers 3–6-month programs to scale tech startups, including digital health ventures, supported by the Kenya ICT Board and public funding.
- **Accelerators**: Kenya Healthcare Innovation Program (Villgro Africa & KENIA): a public-private center which offers bootcamps, pitching contests, small grant awards (~USD5K), incubation support for healthcare tech innovators (devices, software, services). Supports commercialization of early-stage med-tech ideas.
- **Government schemes**: Kenya National Innovation Agency (KeNIA): Under the Ministry of Education (STI Act), coordinates national innovation ecosystem, health innovation calls, policy support, and collaborations with incubators.
- **Research Institute**: Kenya Medical Research Institute (KEMRI) Research Grants: Public funding and collaborative projects in telehealth, health systems research, and biomedical innovation. Konza Technopolis: National smart city development focusing on ICT technology infrastructure including device assembly and digital innovation hubs for manufacturing med-tech and bio-appliances.
- A variety of **international funding opportunities** through different platforms and multinational companies are also available to Kenyan startups (ex: Google for Startups Accelerator Africa).

iHUB a CcHUB Company

nailab INCUBATION . INNOVATIONS . SOCIETY

villgro africa

Kenia Kenya National Innovation Agency

KENYA MEDICAL RESEARCH INSTITUTE KEMRI

KONZA Technopolis

Google for Startups

# SUPPORT PROGRAMS & FUNDING INFRASTRUCTURE (III)



## Stakeholders and support programs in Morocco

- **Government schemes**: Digital Morocco 2030 Strategy — government allocated USD 23Million for Startups to foster innovation and provide robust support to tech-driven startups. This funding supports financial aid, incubation programs, mentorship, and operational assistance across early-stage ventures, with a “Startup Venture Building” initiative underway in collaboration with TAMWILCOM.
  The Ministry of Industry and Trade, together with Maroc PME and CGEM, launched the third edition of its Industrial Innovation Support Program, offering financial incentives to drive R&D, innovation, and pilot industrialization.
  E-Health Interoperability & Digital Maturity via GITEX Africa 2025
  Launch of Africa’s first Interoperability Laboratory for Health Information Systems—a collaborative effort by ADCIES, HIMSS, and IHE Catalyst. It will support testing, certification, and training in global health data standards such as HL7 FHIR, DICOM, and CDA.
  Introduction of the HIMSS EMRAM™ model to assess and elevate digital maturity levels in healthcare institutions.
  Furthermore, several significant agreements were signed: MoU between the Ministry of Health and CDG to create a digital innovation lab responsible for designing tailored digital solutions and building organizational capabilities within healthcare.
  Mohammed VI University of Health Science (UM6SS) stands out as a key player in health innovation and training.

UM6P VENTURES

GITEX AFRICA Morocco

TAMWILCOM

IHE CATALYST

CGEM
LES ENTREPRISES DU MAROC

EMRAM
HIMSS SOLUTION

UNIVERSITÉ MOHAMMED VI
DES SCIENCES ET DE LA SANTÉ
UM6SS

# SUPPORT PROGRAMS & FUNDING INFRASTRUCTURE (IV)



## Stakeholders and support programs in South Africa

- **Strategic Health Innovation Partnerships (SHIP),** run by the South African Medical Research Council (SAMRC) in collaboration with the Department of Science and Innovation (DSI), provides funding for high-impact research and product development. For example, SHIP has funded projects in point-of-care diagnostics for HIV and TB, helping scale local solutions to public health challenges.
  **The Grants, Innovation and Product Development (GIPD)** unit under SAMRC also supports initiatives like Grand Challenges South Africa, which helps researchers move early-stage health technologies toward commercialization.
  **The Technology Innovation Agency (TIA)** offers both funding and technical support to startups and institutions, focusing on commercializing locally developed innovations. A key initiative under TIA is the Medical Devices and Diagnostic Innovation Cluster (MeDDIC), which brings together academia, industry, and government to support the development of locally made medical devices such as ventilators and diagnostic kits. **The Department of Science and Innovation (DSI)** further strengthens the sector through national R&D infrastructure. One flagship example is NuMeRI (Nuclear Medicine Research Infrastructure), which supports early detection technologies for diseases like cancer and tuberculosis through advanced imaging systems. DSI also launched fund the University of Pretoria's efforts to commercialize a rapid diagnostic test for cervical cancer.
- **Startup space**, platforms like the HealthTech Hub Africa provide acceleration and funding—offering up to $100,000 for digital health startups that address public health challenges.

# RESEARCH & DEVELOPMENT LANDSCAPE



**Africa Health Innovation Centre** is the first West Africa research and innovations Centre in health and health technologies.

Several universities such as **Asheshie** and **Accra Technical University** set up incubators in health technologies.

**Noguchi** focus on tropical health, public health and diagnostics is the biggest one and receive international support

Several universities such as **Asheshie** and **Accra Technical University** set up incubators in health technologies.

**Kenya Medical Research Institute (KEMRI)** Research Grants: Public funding and collaborative projects in telehealth, health systems research, and biomedical innovation

**Kenya National Innovation Agency (KeNIA)**: Under the Ministry of Education (STI Act), coordinates national innovation ecosystem, health innovation calls, policy support, and collaborations with incubators.

**Kenya BioVax Institute** is a state corporation with a crucial mission: to manufacture, package, and commercialize specialized health products and technologies. These products include vaccines, therapeutics, and other biomedical solutions.

**Moroccan Foundation for Advanced Science, Innovation and Research**: develops local biotech, diagnostics, and TB testing. Collaborative efforts with Laprophan and others underline its strategic relevance.

**Sheikh Zayed Foundation**: Supports clinical research, infrastructure, genetic research, and university-hospital integration

**OCP Foundation**: Catalyzes R&D across Moroccan universities, industrial partnerships, technology transfer, and thematic research funding

**UMP6**: top universities and research institutions.

**South African Medical Research Council (SAMRC):** funds and manages health-related R&D through programs like SHIP and GIPD

**Technology Innovation Agency (TIA):** supports the commercialization of R&D outputs through grants, infrastructure support, and cluster programs.

**Scientific and Industrial Research (CSIR):** are central to developing and testing new technologies, often in partnership with public and private entities.

# FUNDING AND GRANTS FOR INNOVATION AND TECHNOLOGY TRANSFER I



The Joint AU-EU Innovation Agenda is an unprecedented 10-year policy initiative that aims to foster the translation of Research and Innovation (R&I) into tangible positive socio-economic impact on the ground: products, services, businesses and jobs in Africa and Europe. The Agenda is structured around four objectives and five priority areas: **Public Health**, Green Transition, Innovation and Technology, Capacities for Science and Cross-cutting issues. The dashboard of initiatives for health sector summarizes the main projects recognized as contributing to the implementation of the agenda.

Horizon Europe is the European Union's main funding program for research and innovation, running from 2021 to 2027 with a budget of over €95 billion.

The EIC Accelerator is a funding programme under Horizon Europe that offers support to start-ups and SMEs that have an innovative, game changing product, service or business model that could create new markets or disrupt existing ones in Europe and even worldwide.

Innowwide supports innovative small and medium sized enterprises (SMEs) and startups to assess the viability of research or commercial plans in international markets. The programme offers grants of 60,000 euros

Erasmus Plus Offers grants for training and capacity building programmes with numerous modalities. It can include academic and professional training for different groups.

EDCTP

The European & Developing Countries Clinical Trials Partnership (EDCTP) is a public-public partnership between countries in Europe and sub-Saharan Africa, supported by the European Union. Global Health EDCTP3 supports all the elements required to develop and evaluate medical interventions against the key infectious diseases affecting sub-Saharan Africa. All calls for proposal are available on the funding portal of the European Union.

# FUNDING AND GRANTS FOR INNOVATION AND TECHNOLOGY TRANSFER II



AECID offers yearly grand for cooperation actions in innovation and knowledge opened to private sector. For health the topic prioritized are R&D and innovation in global health that supports the strengthening of health systems, and the prevention, preparedness, and response to health crises, development of technologies and instruments that enable progress toward equity in access to scientific and technological advances for the prevention, diagnosis, and/or treatment of prevalent diseases. Countries: Morocco, Mauritania, Tunisia, Egypt, Cape Vert, Senegal, Nigeria, Malia, Ethiopia, Equatorial Guinea and Mozambique.

CDTI offers unilateral grants for international technological cooperation with several Africa countries such as Morocco, Egypt, Ghana, Ivory Coast, Senegal, Mauritania and Tunisia. Mixed aid: subsidized credit. It can cover up to 85% of the cost of the project on the Spanish side. Minimum budget €175,000.

The Gates Foundation funds innovative ideas to tackle key global health and development problems and provides additional resources for projects that demonstrate initial promise through the Grand Challenges tool.

Fund for Innovation in Development is the tool of the French Cooperation Agency (Agence Française de Développement) to fund innovation projects solving development and poverty challenges. FID funds projects in all sectors but gives priority to proposals in education, health, climate and gender equality. They offer Several innovation stages grants, up to 4,000,000 euros

Global innovation fund offers funding for innovation projects to solve development challenges in all sectors in any developing country. They e invest in the development, rigorous testing, and scaling up of new products, services, business process, or policy reforms that are more cost-effective than current practice and targeted at improving the lives of the world's poorest people. Through grants and risk capital instruments, they support these breakthrough solutions from for-profit firms, non-profit organizations, researchers and government agencies to maximize their impact and catalyse meaningful change.

# 5. Testimonials

## IMPORTER-DISTRIBUTOR

Ms Patricia Ekuba Odoi-Atsem
*CEO*
**3M&C Ghana LTD**

## HOSPITAL

Dr. Sikolia Wanyonyi
*Consultant Obstetrics and Fetal Medicine*
**Aga Khan University Hospital**

## START-UP INCUBATOR

Mr. Wilfred Njagi
*Co-founder and CEO*
**Villgro Africa**

# 6. Market Entry Strategies

# MARKET ENTRY STRATEGIES

## Med Tech

| Types of client | Types of partner | Strategy | Pros | Cons |
|---|---|---|---|---|
| **Public hospitals** | **Importers-distributors Integrators:**<br>• Projects sourcing<br>• Maintenance<br>• Technical support<br>• Training<br>• Engagement with Doctors | Identify multilateral and bilateral funding support<br>Liaise with past awardees<br>Adaptation to local needs<br>Local assembly to reduce costs | Biggest market share | Price sensitive<br>Payment challenges |
| **Private hospitals** | | Position your technology through Doctors' referrals<br>Organize demonstrations, trials, visit the hospitals together with the partners to adapt and provide solutions to local problems | Growing market<br>Niche markets for high quality technologies | Smaller market |
| **Greenfield hospital projects** | Local integrators/Installers | Identify and screen private investments projects.<br>Liaise with contractors (not always locally established)<br>Create a network of local partners to position your company with them. | Big projects and potential in the future | Decision centre sometimes outside the market. Requires a multilocation business prospection approach. |

## Health Tech

For health tech solutions, the company can either work with a local integrator of IT solutions that have experience in the health sector or opt for co-innovation and co-development strategies connecting with the local innovation ecosystems and start-ups and sourcing for funding (grants or seed capital).

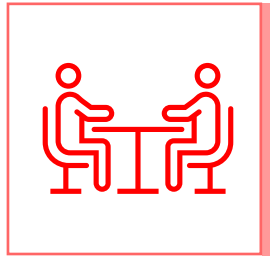
# Strategic Roadmap for Catalonia

**Short Term (1–2 years):**

1. Enter **Ghana & Kenya** via accelerators and innovation hubs.
2. Pilot 2–3 Catalan health tech solutions through co-creation programs.

**Medium Term (2–4 years):**

1. Build **joint research hubs** in **Morocco and South Africa**.
2. Access public innovation funding and scale validated pilots.



**Long Term (4–5 years):**

1. Position Catalonia as a **continental innovation partner** for health tech acceleration.
2. Leverage EU–AU innovation frameworks for co-investment.

# Regulatory Entry Readiness for Med–Technology: Fragmented Markets



| Country | Regulatory Maturity | Market Access Barrier | Entry Speed | Intellectual property | Enforcement Level |
|---|---|---|---|---|---|
| **Ghana** | Moderate | FDA, Market holder requirement | Medium | ORC, WIPO, GIPC | Low |
| **Kenya** | High | Dual body involved: Pharmacy and Poisons Board, Kenya Bureau of Standards need local representative, but has abridged pathway for CE/FDA-approved devices | Medium | ARIPO | Low |
| **Morocco** | High | Barrier is procedural, not scientific Directorate of Medicines and Pharmacy, National Advisory Commission for Medical Devices | Medium | OMPIC, WIPO | Medium |
| **South Africa** | Very High | Lengthy evaluation timelines, and high compliance cost | Slow | WIPO,. CIPC | High |

# 7. Conclusions & Recommendations

## Key Takeaways – Ghana

- **Ghana's health tech market is price-sensitive**, fragmented, and dependent on donor-funded projects.
- The **private sector is growing**, but access to capital and scale remains limited. The sector is supported by 150+ startups, incubators, and innovation hubs signaling **strong local innovation capacity** but **weak purchasing power**.

**Entry Strategy:**

- Start with a low-risk importer–distributor model to test affordability and ensure cash flow in a market with delayed payments.
- Option 2 (co-development) applies only if the Catalan firm is willing to localize technology, build on Ghana's startup ecosystem, and leverage international funding (DFIs, EPC hospital projects).

## Key Takeaways – Kenya

- **Kenya's market is highly competitive**, but innovation-driven with >180 startups and strong incubators (Villgro Africa, HealthTech Hub).
- Regulation is progressively harmonized (IMDRF/MDSAP), but bureaucratic — hence the need for a trusted local partner. **Success depends on affordability, after-sales service, and local adaptation.**

**Entry Strategy:**

- **Appoint a local representative/distributor for import,** regulatory filings, and participation in donor-funded projects.
- Catalan firms should co-develop solutions (e.g., diagnostics or telemedicine tools) with Kenyan partners to tailor to local use cases.

## Key Takeaways – Morocco

- **Morocco's system is centralized and reform-driven**, with strong political commitment and a growing digital health market. However, administrative bottlenecks and territorial disparities make it slow for new entrants to scale.
- Market success often depends on alignment with government priorities (Digital Morocco 2030) and partnerships with public hospitals.

**Entry Strategy:**

- Catalan firms should collaborate with public entities through pilot projects or innovation hubs to build trust and demonstrate outcomes.
- Focus on public–private partnerships or institutional MoUs before broad commercialization.

## Key Takeaways – South Africa

- **South Africa's market is mature but rigid** with complex procurement, strict certification, and high local content requirements.
- The system is dual: centralized public procurement (slow but large) and dynamic private sector (faster but competitive).Barriers include import costs and regulatory delays, but also huge demand for AI, diagnostics, and digital health.

**Entry Strategy:**

- Catalan firms should partner with established local distributors or hospital groups to navigate procurement and certification.
- For faster growth, consider joint ventures or acquisitions that meet localization requirements.

# RECOMMENDATIONS

**Key Strategic question:** is the Catalan company focusing on a one-size-fits-all solutions export strategy or is the Catalan company willing to innovate, co-develop, co-assemble, co-manufacture, transfer and adapt a technological solution embedded in the local health context to position themselves in the long-term opportunities?

## One-fits-it-all model:

- Get to know the **market conditions** and **purchasing power** to make sure the market is open to absorb your offer and your prices. Identify if your offer can adapt to the local context and provide a solution.
- Focus on your **target market:** private sector niche versus public sector.
- If yes, work with a **local importer-distributor** with target contacts in your markets.
- Engage with **international EPCs and investment funds** specialized in greenfield hospital projects.
- **Follow the funding movements.**

**Africa is the future**

Adaptation can come at a cost now but success keys for Africa will allow you to grow alongside with the continent future opportunities.
Follow-up, persistence, empathy to local challenges and trust establishment are key intangible keys to success.

## Local context inclusive solutions:

- **Build Strong Local Partnerships:** Collaborate with experienced distributors, hospital groups, and ecosystem players who understand the regulatory environment and procurement processes, especially in the public sector.
- **Localize Where Possible** – Explore joint ventures, local assembly, or technology transfer to reduce costs, improve competitiveness in tenders
- **Demonstrate Impact Through Pilots** – Partner with leading hospitals, key specialists and universities to run pilot projects in areas of high demand (oncology, cardiology, nephrology, maternal health, and rural telehealth) to prove clinical and cost-effectiveness.
- **Adapt Solutions to Context** – Focus on affordable, durable, and easy-to-maintain equipment, as well as mobile-first and AI-driven solutions
- **Engage in Ecosystem Collaboration** – Position as long-term partners by contributing to training, after-sales support, and co-development of solutions tailored to local healthcare challenges.

# Our Team

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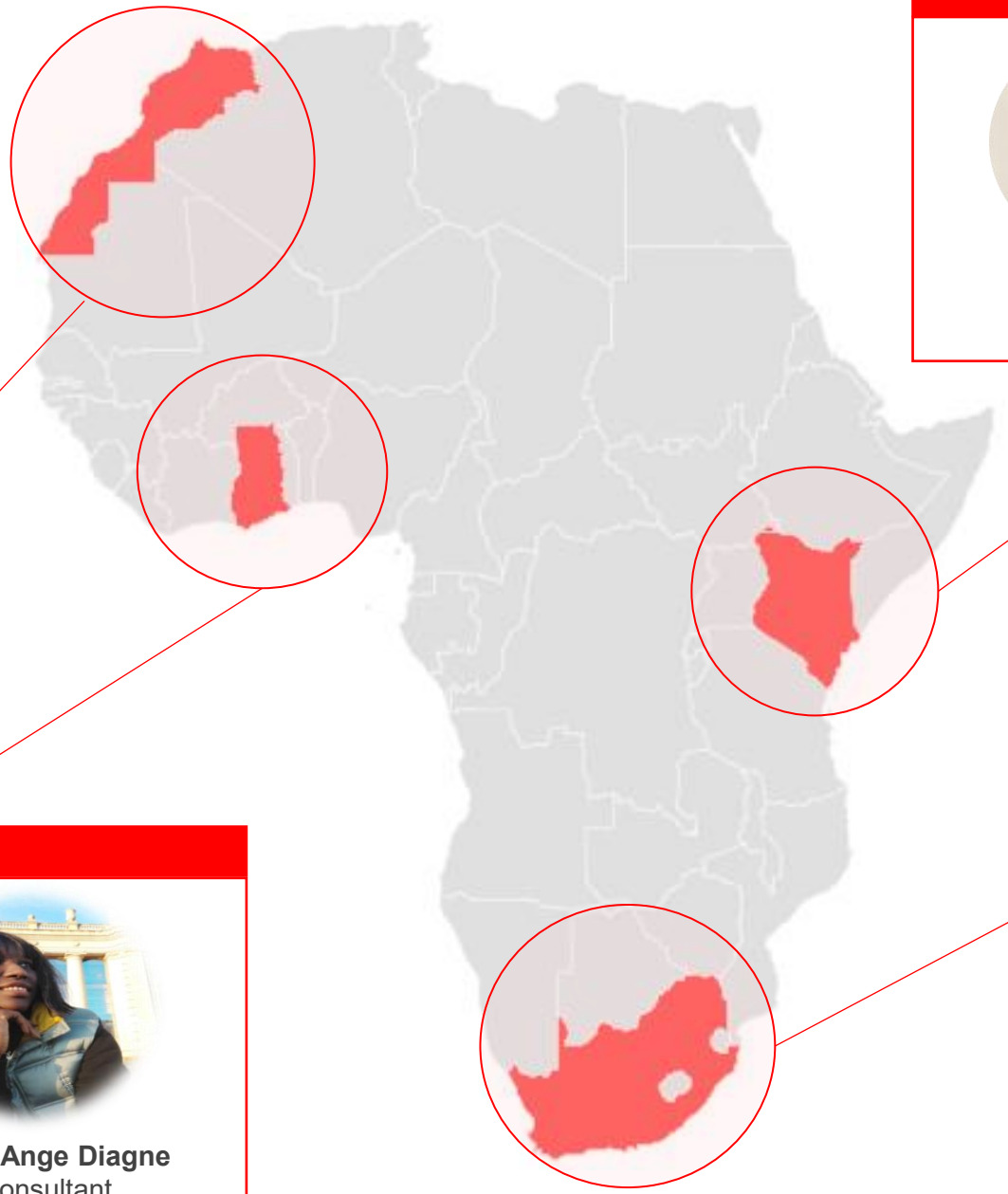

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# Thank you!

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