BEYOND CATALONIA

Anticipa't. Adapta't. Actua.
La resposta al nou escenari global

14 Novembre 2025

Sector salut a l'Àfrica: innovar amb impacte en un mercat d'alt potencial i alt repte

Fem avui l'**empresa** del demà

40 anys ACCIÓ Catalonia Trade & Investment

Generalitat de Catalunya

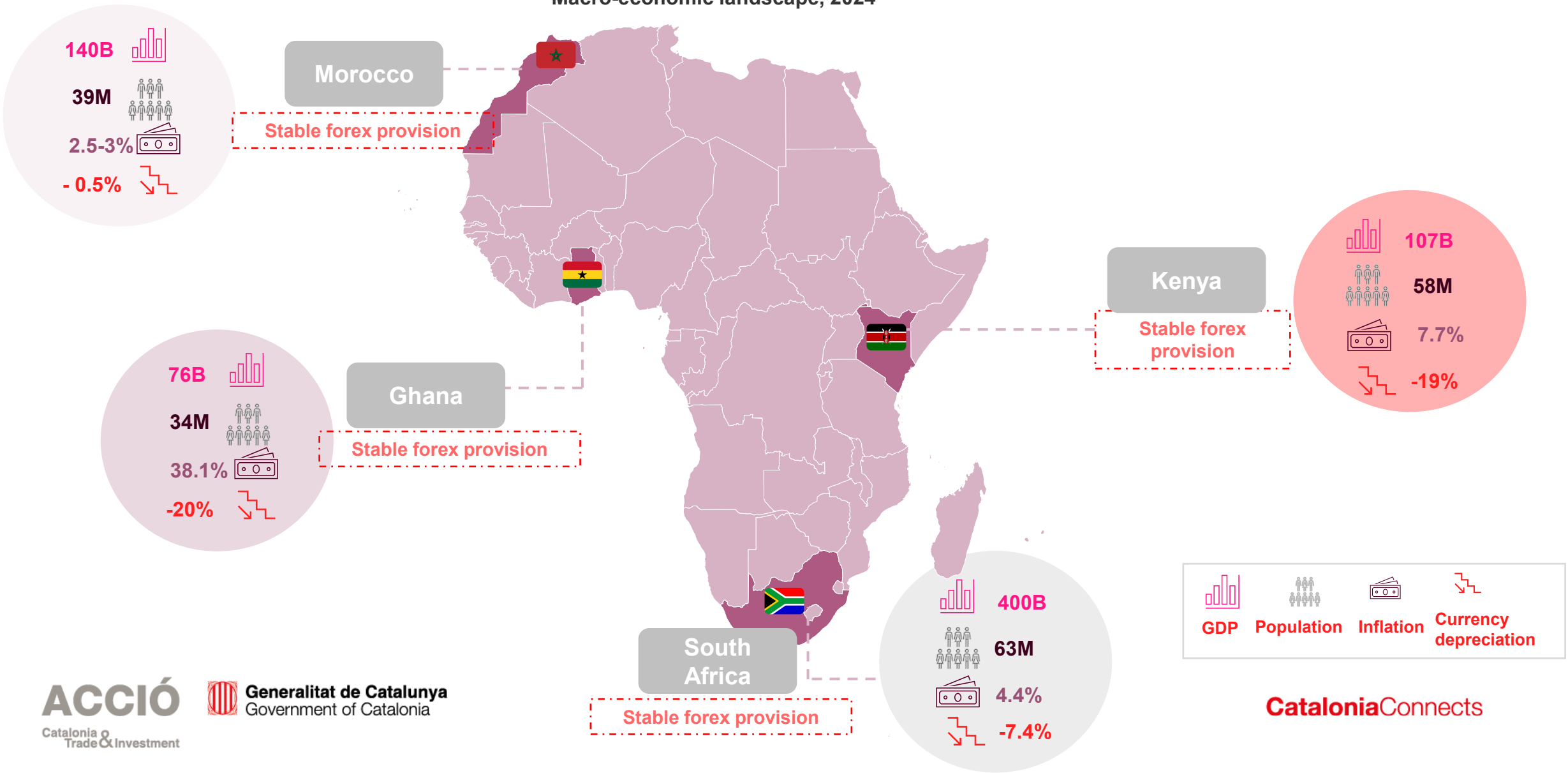
Programme

1. Africa Health Sector Introduction
2. Overview of the Africa MedTech and HealthTech Study
3. Testimonials
4. Market Entry Strategies
5. Conclusions & Recommendations
6. Next Steps

1. Africa Health Sector Introduction

COUNTRIES OVERVIEW

Macro-economic landscape, 2024



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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

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Sources: Statista and Official Records

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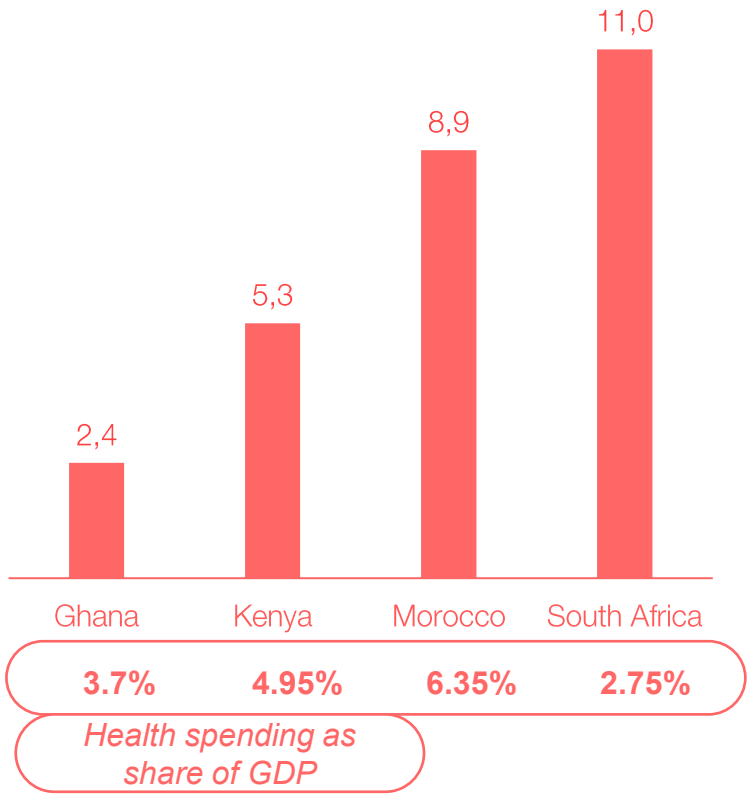
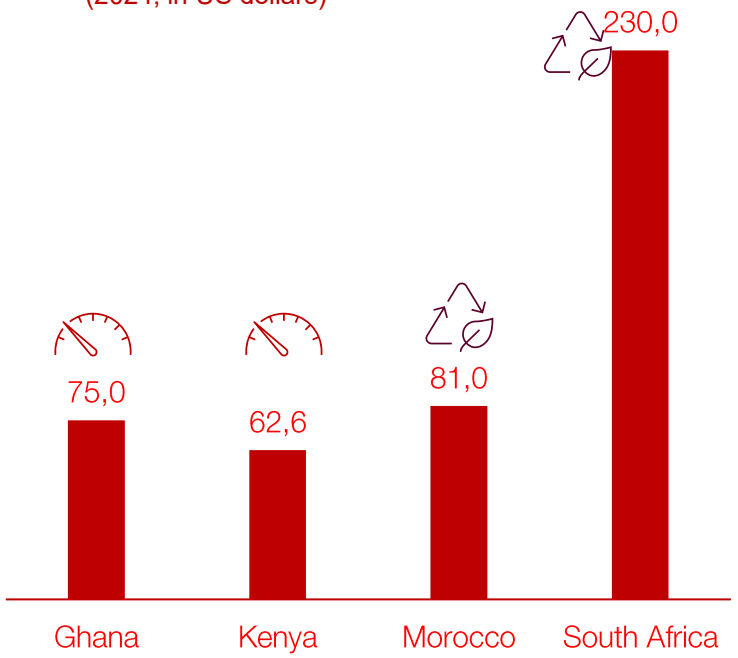
HIGH LEVEL SPENDING SNAPSHOT

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)

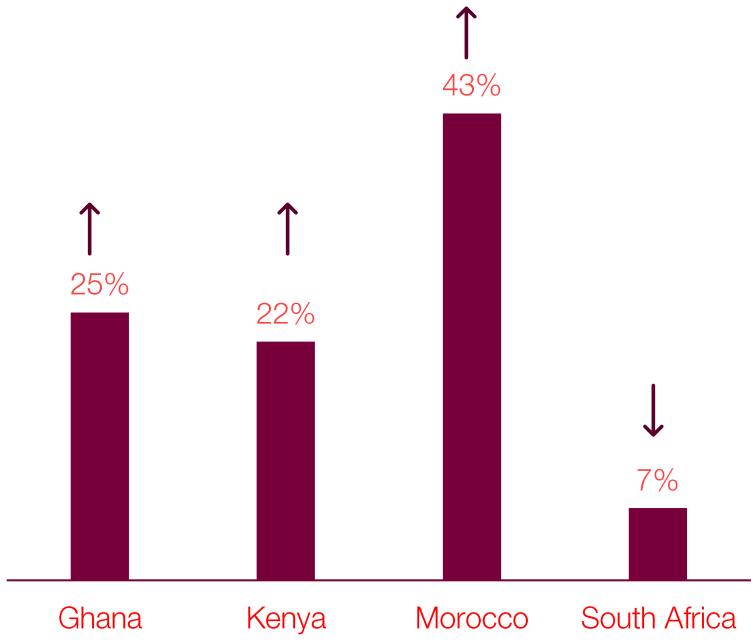


Below WHO benchmark of $80-100

Closer to sustainable thresholds

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)



High or Low Financial burden on households

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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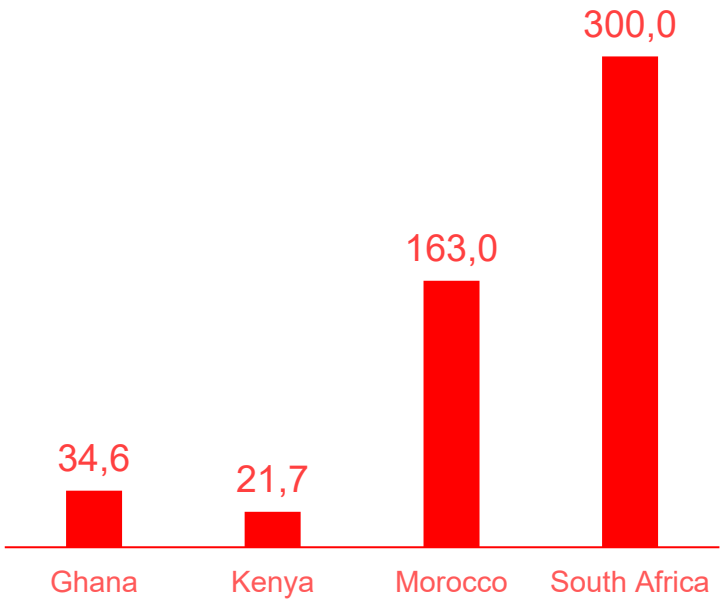
Sources: Statista and Official Records

Consumer Healthcare Spending Pattern

Consumer Spending per Capita

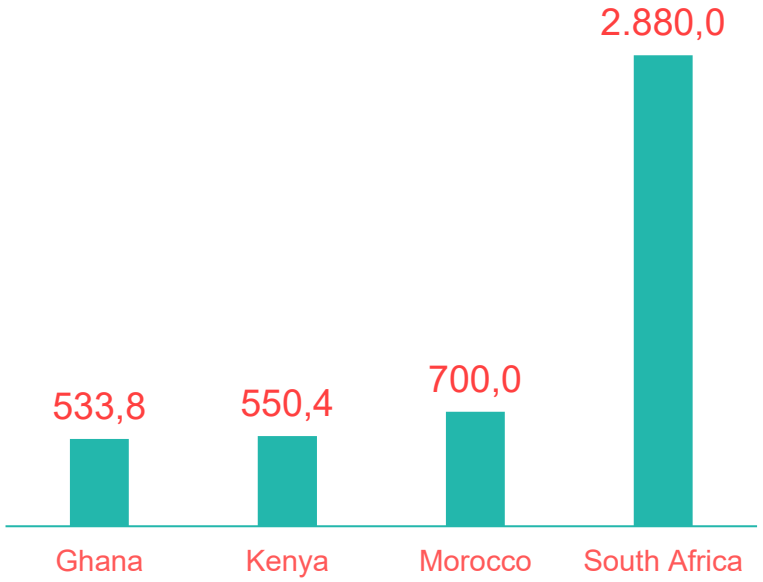
(2024, in US dollars)



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

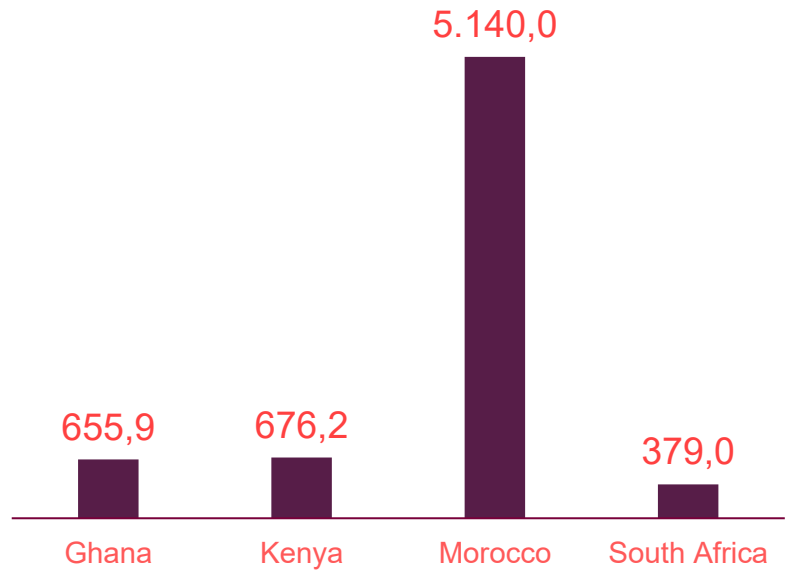
(2024, in million US dollars)



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

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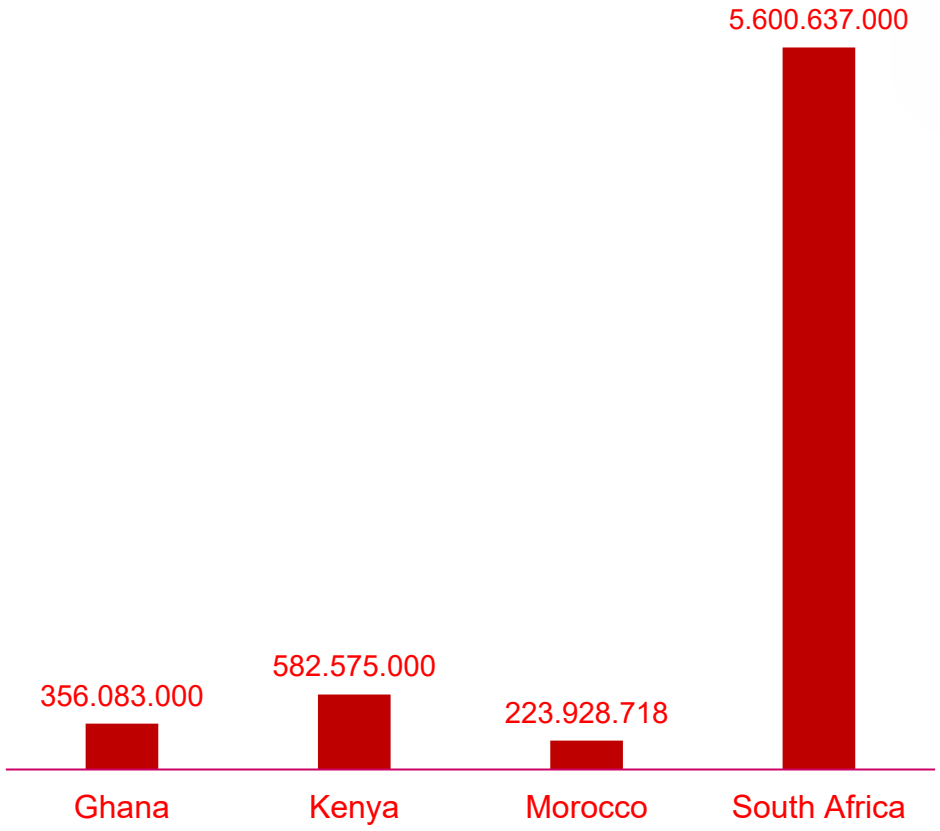
2. Overview of the Africa MedTech and HealthTech Study

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.

International brands with distribution in Ghana

BRAUN

Baxter

TERUMO

MERITMEDICAL

fisher healthcare part of Thermo Fisher Scientific

Agilent

Local distributors in Ghana

ARCOA GHANA LTD

3M&C MEDICAL EQUIPMENTS AND SUPPLIES

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.

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.

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

- **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.

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.

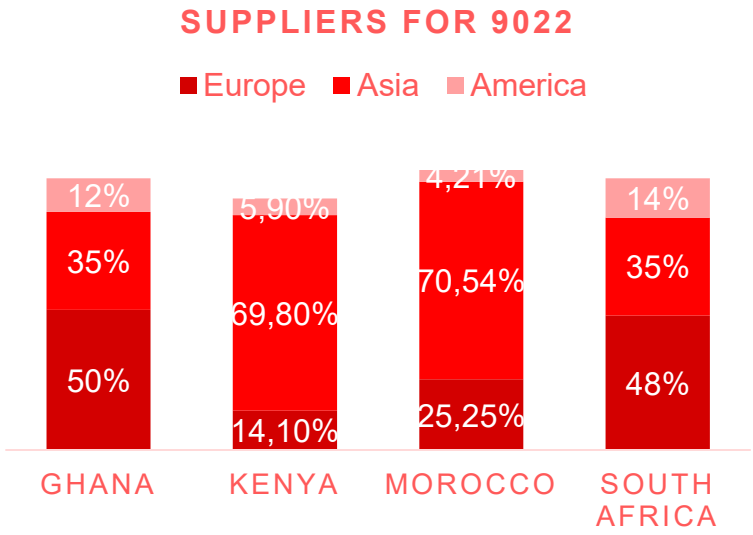
CATEGORY ANALYSIS (TOP HS CODE HIGHLIGHTS)

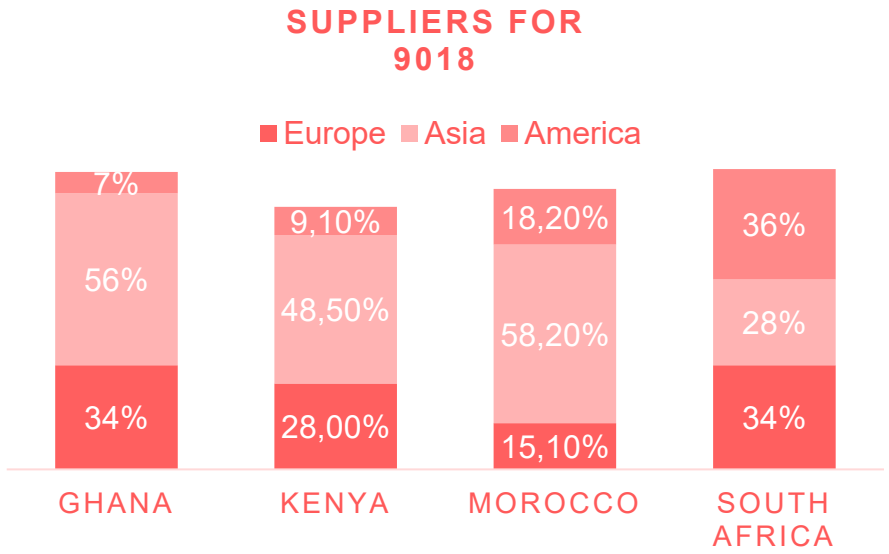
HS 9022 (X-Rays / imaging): Across the 4 markets, this category of products had the highest value imports and premium suppliers from Europe and China dominated. The category presented higher entry barrier (regulatory, training) but large payoff in private hospitals and diagnostic chains.

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

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.

Innovation Ecosystem

Startups

Startup-led innovation with donor & incubator support: Ghana , Kenya

State-led digital transformation: Morocco

Research-integrated innovation economy: South Africa

Support programs & Funding infrastructure

NGOs, Incubators, Universities-linked incubators, Multilateral donors, Development Finance Institutions

Innovation hubs and incubators, Accelerators, Government schemes, Research Institute, international funding opportunities

Government schemes

Strategic Health Innovation Partnerships, Grants, Innovation and Product Development , Startup space

INNOVATION ECOSYSTEM

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.

3. 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

4. Market Entry Strategies

MARKET ENTRY STRATEGIES

Med Tech

Types of clients	Types of partners	Strategy	Pros	Cons
Public hospitals	**Importers-distributors** **Integrators:** • Projects sourcing • Maintenance • Technical support • Training • Engagement with Doctors	Identify multilateral and bilateral funding support Liaise with past awardees Adaptation to local needs Local assembly to reduce costs	Biggest market share	Price sensitive Payment challenges
Private hospitals		Position your technology through Doctors' referrals Organize demonstrations, trials, visit the hospitals together with the partners to adapt and provide solutions to local problems	Growing market Niche markets for high quality technologies	Smaller market
Greenfield hospital projects	Local integrators/Installers	Identify and screen private investments projects. Liaise with contractors (not always locally established) 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).

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

5. Conclusions & Recommendations

Key Strategic Question

Key Strategic Question

- Are you focusing on a **one-size-fits-all** solution export strategy?

or

- Are you willing to **innovate, co-develop, co-assemble, co-manufacture, transfer and adapt** a technological solution embedded in the local health context to position yourself in the **long-term** opportunities?

General Conclusions & Recommendations

One size-fits-it-all model

- Know the **market conditions** and **purchasing power**
- **Target market:** private sector niche vs public sector
- Work with a **local importer-distributor**
- Engage **international EPCs & investment funds**
- **Follow the funding movements**

The future is here

Local context inclusive solutions

- Build Strong Local Partnerships
- Localize Where Possible
- Demonstrate Impact Through Pilots
- Adapt Solutions to Context
- Engage in Ecosystem Collaboration

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The Future Is African

6. Next Steps

Africa Health Impact Benchmarking Mission 2026

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CUSTOMIZED MARKET ENTRY SUPPORT

What is a Market prioritization project?

We gather the same information and market feedback in all selected markets

You have selected 1 or 2 markets?

We propose you a specific market entry project in the selected markets (such as search and prospection of market entry channels, B2B agenda, etc…)
Check here if you are ready to start through our check list

You need more market input and feedback to select your priority markets ?

We propose you a Market Prioritization project

Country stability
1. GDP – GDP per capita
2. Growth
3. Political stability
4. Doing Business
5. Monetary stability and Forex controls
6. Language and cultural distance

Market potential and feedback
1. Local and international competition and price level
2. Number of local manufacturing companies and supermarkets
3. Market entry channels and strategy
4, Evaluation of the value chain
5. Prospection feedback of 3 partners
6. Prospection feedback of 3 end users

Prospection sample of 5 companies in each market

Market size:
1. Imports in volume
2. Imports in growth
3. Import purchasing power
4. Market share From Europe Versus Asia
5, Commercial balance
6, Top 3 supplying makets' share

Market Barriers:
1. Certifications
2. Imported products prohibition list
3. Duties and taxes
4. Logistic costs
5. Number of international manufacturers established
6. Numbers of Spanish exporting companies

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ARE YOU READY FOR AFRICA? CHECK LIST

Priorities

- Adaptation of my product-solution to the market?
- Where in Africa? There are 54 different countries.
- Market segment and entry strategy?
- Do I know the environment of the country where I want to export or work: history, culture, regulatory framework?
- Do I know who and how my competition works?

Marketing Material

- Cover letter
- Website in the language of the country
- Hard copies of catalogues and samples
- Adaptation of the marketing material to the market
- Pitch
- References in Africa
- HS codes

Resources

- Language: FR – ENG – PT
- Work team – stability, seniority, enthusiasm
- Technical needs definition template
- Availability to travel to the field
- Read, learn about the history and context of the country
- Medium-long-term strategic plan?

Our Team

Casablanca Office

Shan Elasri
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Sanaâ Rouchdi
Consultant

Saloua El Ghabzouri
Consultant

Nairobi Office

Robert Bach
Director

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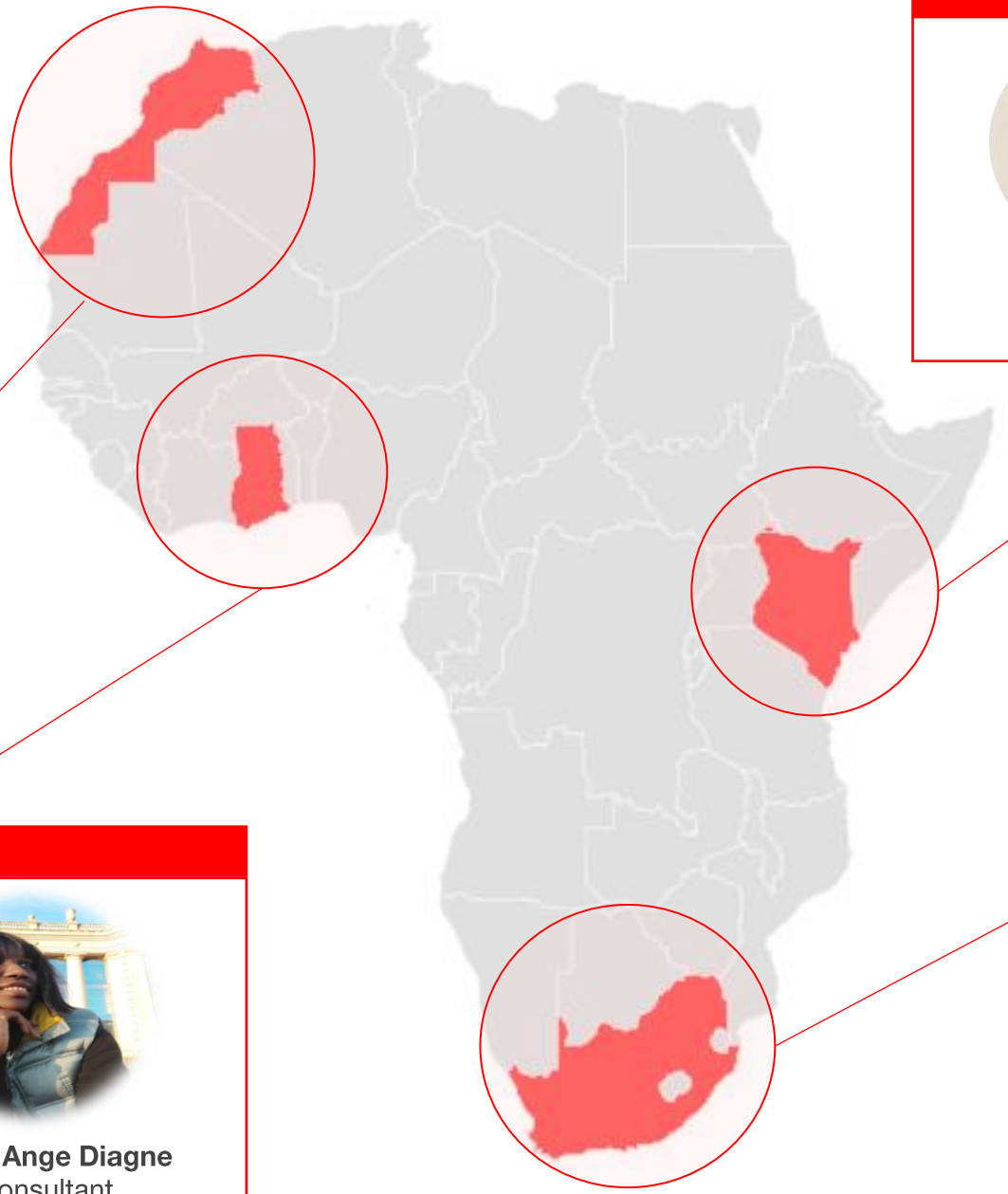
Consultant



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