

Saudi Arabia Hospital Supplies Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The Saudi Arabian hospital supplies market was valued at USD 905.60 million in the base year. It is expected to reach USD 1,241.09 million at the end of the forecast period, registering a CAGR of 5.53%.

COVID-19 impacted the market adversely during its initial phase. Hospital admissions and healthcare services were significantly reduced due to social distancing measures taken by the government of Saudi Arabia. COVID-19 not only affected the economy of the country but also had a huge impact on the functioning of hospital care for non-COVID-19 patients in the country. Various research studies suggest that diagnostics and healthcare centers closed their patient admission during the pandemic's initial phase, which significantly hampered the hospital supplies market in the country. The high risk of cross-infections and people avoiding going outside influenced the overall market in the country. However, the market recovered after the restrictions were lifted and the import of medical supplies from various countries resumed.

In addition, increasing incidences of communal diseases, growing awareness about hospital-acquired infections, and a rise in the aging population are the key factors affecting the growth of the market.

Although most infectious diseases can be treated or prevented, infectious diseases have a profound impact on the mortality of the target population in Saudi Arabia. According to a research article published in August 2022 by the National Center for Biotechnology Information (NCBI), brucellosis, chickenpox, and amoebic dysentery are the most chronic infectious diseases that are transmitted easily among people in Saudi Arabia. As per the same source, there was a 57% increase in contagious disease-related hospital admissions during the Hajj event every year, with pneumonia accounting for up to 39% of all hospital admissions during this time.

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According to the article published in *Mircroorganisms Journal* in September 2022, *Escherichia coli* isolates were predominantly found among cardiovascular, kidney, and cancer patients, in the retrospective study conducted in a tertiary hospital in Saudi Arabia. As the number of infectious disease patients and other patients with chronic diseases affected by infections is increasing in the country, the need for hospitalizations is also increasing, which is further expected to fuel the market's growth.

Rising awareness about the importance of infection control in health facilities is one of the major factors that is leading the government of Saudi Arabia to launch various initiatives. For instance, according to the Ministry of Health (MOH) report published in January 2022, due to an increase in the number of cases of HAIs, MOH celebrates Health Days Week in the month of October, following the International Infection Control and Prevention guidelines. As a part of the mentioned initiative, in January 2022, MOH awarded the International Medical Center (IMC)'s Infection Control and Prevention Department as a "center of excellence" for 2020-2021 among all other hospitals in the private sector in Jeddah, Saudi Arabia. Such initiatives are projected to create awareness among the target population about HAIs and the healthcare community regarding infection control procedures in healthcare settings. Therefore, this factor is expected to create numerous opportunities for hospital supplies and their availability in hospitals and contribute to the market's growth.

Such factors indicate that there is a growing demand for outpatient surgical centers, imaging centers, and physician offices, thus boosting the demand for hospital supplies. This demand is expected to propel the market's growth during the forecast period. However, the growing adoption of home healthcare services may impede the market in the future.

Saudi Arabia Hospital Supplies Market Trends

Operating Room Equipment Segment is Expected to Hold a Significant Market Share During the Forecast Period

The public demand for operating rooms, where critically ill patients are treated, is witnessing a steady rise. The survival rate of critically ill patients in the emergency department is directly related to the advancement of early recognition and treatment of diseases and continuous observation by the nurse staff members, doctors, and physicians. Some of the durables in the operating room include utility columns, surgical and exam lights, stretchers and their accessories, cushions, mattresses, sterilizing and cleaning equipment, and surgical tables and accessories.

In Saudi Arabia, despite advancements in safety technology, a high number of road accidents is among the primary reasons for the rising demand for operating rooms or emergency rooms, along with the necessary equipment. According to the Ministry of Health Saudi Arabia Report published in May 2021, the number of accident injuries recorded in 2020 was 25,561. There are a significant number of cases of hemiplegia, paraplegia, and quadriplegia in the country due to road accidents, which require hospital admissions for treatment. In the operating room segment, the country is equipped with hospital supplies from several major companies, such as Arabian Health Care Supply Company (AHSCS), Emitac Healthcare Solutions, and Cardinal Health.

In addition, rising partnerships of medical device companies with the Saudi Arabian government agencies may further lead to increased adoption of general surgical devices in this region, thus driving the market's growth. For instance, in September 2021, the Saudi Authority for Industrial Cities and Technology Zones (MODON) signed an industrial land lease contract in Jeddah's Third Industrial City to centralize the Kingdom's medical supply business. The contract aims to set up a project to localize the production of sterile surgical instruments ready for use in operations.

It is expected that better government involvement through funding, initiatives, and collaboration with multinational companies may provide consistent growth in the operating room equipment segment. According to the Gulf Cooperation Council (GCC)'s report, published in April 2021, Saudi Arabia announced plans to invest USD 66 billion in healthcare infrastructure by 2030, with a goal of increasing private sector participation.

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The strategic initiatives adopted by key players is expected to fuel the segment's growth. For instance, in March 2021, Careon Healthcare Solutions finalized joint ventures in Saudi Arabia and Sri Lanka for surgical, medical disposable products. Such partnerships are projected to increase the availability of hospital supplies in the operating room and contribute to the segment's growth during the forecast period.

Disposable Hospital Supplies Segment is Expected to Hold a Significant Market Share During the Forecast Period

Disposable medical supplies include products that are used to prevent cross-contamination among healthcare caregivers/professionals and patients during diagnosis and treatment procedures.

Increasing surgical procedures, increasing hospital-acquired infections (HAI), and growing public awareness of the value of maintaining hygiene and good health are important drivers of the expansion of the disposable medical supplies market.

As per the study by the International Journal of Innovative Research in Medical Science (IJIRMS) published in June 2022, a total of 1,078 patients were admitted to the hospital ICUs, out of which healthcare-associated infections were reported in 316 patients. Catheter-associated Urinary Tract Infection (CAUTI) was reported in 70 patients. Klebsiella pneumonia (20%) was the predominant isolate, with Serratia (3%) and Providencia (3%) species being the least common isolates. Thus, the increasing cases of HAIs in the country are expected to increase the demand for disposable hospital supplies, which is further expected to boost the growth of the market over the forecast period.

In June 2021, the Federal Ministry of Health received a donation of some medical equipment worth USD 1 million from the Government of Saudi Arabia to further strengthen the fight against COVID-19. Thus, such instances are expected to boost the growth of the segment over the forecast period.

Various strategic initiatives adopted by market players are expected to propel the segment's growth. For instance, in July 2022, UAE-based company ViroMasks announced the availability of its revolutionary ViroMasks product via the Noon eCommerce platform in Saudi Arabia. ViroMasks are made in the United Arab Emirates following ISO quality controls and Swiss technology. In March 2021, CareonHealthcare Solutions finalized joint ventures in Saudi Arabia and Sri Lanka for surgical, medical disposable products. Such developments are leading to the high availability of products in the country, which is expected to propel the segment's growth during the forecast period.

Saudi Arabia Hospital Supplies Market Competitor Analysis

The Saudi Arabian hospital supplies market is fragmented due to the presence of several major players. Some of the market players are acquiring a significant market share by focusing more on the distribution channel of the products. A few of the key market players include 3M Company, B. Braun SE, Baxter International, Becton Dickinson and Company, General Electric (GE Healthcare), Johnson & Johnson, Cardinal Health, Smith & Nephew, and Stryker Corporation.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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