Middle East and Africa Wireless Healthcare - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Middle East and Africa Wireless Healthcare Market size is estimated at USD 4.68 billion in 2024, and is expected to reach USD 14.04 billion by 2029, growing at a CAGR of 24.54% during the forecast period (2024-2029).

It is predicted to aid the wireless healthcare market advance further across the region on the back of increased streamlining of communication and pressure relieving on the healthcare administration. Wireless healthcare has developed as a thriving healthcare industry around the region because of enhanced avoidance of cardiac attacks or disease identification for sooner treatment commencement.

Key Highlights
-With considerable improvements in healthcare infrastructure, there has been an increased demand for Internet of Things (IoT) enabled remote monitoring and communication solutions. This, in turn, has accelerated the broad use of wireless healthcare solutions in hospitals and nursing homes to provide better treatment by collecting medical data via body-worn sensors. In conjunction with this, the increasing prevalence of smartphones and the acceptance of various wearable medical devices in diagnostic sensors serve as other growth-inducing elements.
-Transmission of high-quality images, such as ultrasound and medical images, can be considerably shortened by using a high-bandwidth transmission. Several monitoring and diagnostic tasks can be done concurrently with today's wide network capability. High QoS improves the reliability and efficiency of data delivery. For example, diagnostic images may be sent from the ambulance to the hospital, allowing clinicians to begin diagnosing as the patient is being transported. A hospital intranet can be built using WiMAX networks. In place of several WLAN access points, only a few WiMAX base stations may cover the entire hospital.
-According to National Center for Biotechnology Information, Bluetooth low energy also operates in the 2.4 GHz band. It has a

range of 15 to 30 meters and a bandwidth of 1 Mbps (four times that of ZigBee). There are two types of Bluetooth low-energy implementations: "dual mode" and "single mode." Single-mode devices are small radio communication units that can be incorporated into wireless medical monitoring with dimensions of just a few millimeters. Because of the low power consumption, medical monitors can function for months or even years on standard coin-cell batteries.
-As technology has advanced, so have the tactics of hackers. There is a new breed of cyberterrorism that is daunting. It is enhanced cybersecurity must be a priority in all areas of healthcare, including medical devices. Medical information is exchanged between various stakeholders, such as manufacturers, healthcare providers, and suppliers. Robust security measures are required whenever the data is exchanged through medical devices to mitigate breaches in security.
-Furthermore, the rising prevalence of hospital-acquired infections (HAIs), particularly during the COVID-19 pandemic, increased demand for wireless healthcare to reduce physical contact, fueling the market growth. Furthermore, introducing mHealth solutions, mobile applications for healthcare practitioners to engage with patients, and biosensors to collect information about health issues is fueling market expansion. Additional factors, such as hospitals and governments using a patient-centric approach, the increasing adoption of linked devices, and the mainstreaming of cloud computing to store patient data, are producing a bright outlook for the market.

MEA Wireless Healthcare Market Trends

Increasing Adoption of Connected Devices in Healthcare

- Wireless healthcare refers to the utilization of wireless technology in conventional medicine. It encompasses the aspects of diagnosis, monitoring, and treatment of illnesses. Moreover, wireless technology can greatly assist individuals in enhancing their overall health and well-being. Primarily, bluetooth medical devices are utilized to provide patients with the convenience of wirelessly connecting their medical devices. A prime illustration of this is a wearable device that keeps track of heart rate and pulse oximetry, subsequently showcasing the data in an application on the patient's smartphone.
- Healthcare in the UAE is regulated at both the federal and emirate levels. The government is liberalizing policies to attract foreign investments to improve the healthcare standard and boost the healthcare industry, which is expected to be one of the critical factors driving market demand. The Saudi Food & Drug Authority (SFDA) monitors and controls the import and distribution of medical devices, pharmaceuticals, and food products. The recently introduced Medical Device Interim Regulations have made Saudi Arabia a regulated market for all kinds of medical devices, and all manufacturers supplying medical devices require Saudi Food and Drug Market Authorization.
- Arab Health, the region's premier healthcare conference and trade event held annually in Dubai, continues to be an engine for ideas, partnerships, innovation, and collaboration. In January 2022, various companies participated in Arab Health 2022 in the UAE to bring the world together to discuss the future of healthcare. In January 2022, Abtrace, a UK health tech start-up using machine learning and clinical innovation in primary care delivery, joined the UK Pavilion at Arab Health 2022 to launch a proactive monitoring system device designed to empower patients with chronic conditions. For patients, the unique technology helps to improve health, reducing death, disability, and hospital admissions resulting from delayed and missed monitoring.
- Wearable technologies and connected medical devices were also on the rise in the region, allowing patients to track and manage existing ailments while providing preventative measures. The GCC region has also suffered huge demands for patient monitoring kits and ventilators. Dubai's healthcare regulator is also exploring using an artificial intelligence-powered device for remote patient monitoring.
- For instance, in February 2022, the Dubai Health Authority (DHA) announced that it would collaborate with Enpy, a local start-up, for a non-invasive medical device paired with a smartphone/tablet. The device combines integrated medical sensors, embedded electronics, and a unique user interface. The device monitors important information, such as vital signs, to make patients better decisions.
- According to Cisco Systems, the connected devices in the Middle-East and African region is likely to increase in 2023, By 2023, it

is projected that Middle East & Africa will have 611 million Internet users, which accounts for 35% of the regional population. This figure represents a significant increase from the 381 million Internet users in 2018, which comprised 24% of the regional population.
- Such a huge rise in connected devices is expected to create an opportunity for the market players in the region to develop new products to capture the market share. The UAE Ministry of Health is working with an Emirates Integrated Telecommunication Company PJSC (Du) to enhance options for tele-based healthcare. These included Virtual Hospitals where doctors and nurses can provide remote care to patients using AI and smart devices and monitoring.

Israel Holds Significant Market Share

- Israel's public healthcare system is highly developed according to international standards. However, it could benefit from increasing the number of hospital beds, doctors, and nurses and the public spending ratio to align with other Western countries. Currently, Israel allocates only 7.5% of its GDP towards healthcare, although it does provide comprehensive coverage to the entire population through four independent health management organizations and a network of hospitals, community clinics, and specialized doctors. Moreover, Israeli healthcare facilities are known for their modernity and willingness to embrace new, cost-effective technologies and procedures.
- According to the Israel Central Bureau of Statistics, Israel's government planned to spend ILS 91.23 billion (USD 24.47 billion) on health last year. During the observed period, the government's investment in health gradually climbed. This increase could be attributed to increased public pressure on the government to invest more in the public health system and a demand by health personnel for better working conditions.
- In March 2022, Essence SmartCare, a player in remote care and telehealth solutions and services, announced the successful conclusion of a pilot program to integrate its VitalOn remote patient monitoring platform with Clalit Health Services, Israel's largest HMO, and homecare provider Sharan Medical Care. During the pilot, dozens of patients were transferred from hospitals to be monitored at home by the VitalOn system, which adapted to each patient's unique needs.
- In July 2022, OneLayer, a pioneer in safeguarding private LTE/5G networks for organizations, announced that its security platform for private 5G cellular networks would be deployed in two Israeli hospitals: Galilee Medical Center and The Baruch Padeh Medical Center, Poriya. Cellcom will install the networks, which will be based on Nokia technology and will be funded by the Israel Innovation Authority. Hospitals and businesses increasingly construct private cellular networks based on LTE/5G infrastructure. Cellular networks necessitate a completely new security solution capable of mapping connected devices from cellular protocols to the IP-based world.
- Similarly, Donisi Health, a Tel Aviv-based contactless health monitoring solutions manufacturer, recently announced that their Gili Pro BioSensor system had gained FDA De Novo clearance. The Gili Pro remotely monitors surface-level micro-vibrations related to interior organs' functioning using a mix of optical sensors and unique artificial intelligence algorithms. According to the FDA, the device can assess pulse, cardiac, respiratory, and/or breathing rates.
- Israel does not have a medical device classification system. Still, it acknowledges classifications from the following agencies upon submission of verified evidence of clearance from one of the GHTF countries by the sponsoring company: FDA 510 (k) clearance or PMA approval in the United States, a CE mark certificate issued by a European Notified Body, a Certificate to Foreign Governments (CFG) or a Certificate of Free Sale (CFS) from the country of origin. Certain electromedical devices must also be validated and certified by the Israel Standard Institute (ISI) to assure product quality and safety. To receive ISI certification, companies must submit a sample of the medical equipment for review along with supporting paperwork to the ISI.
- Moreover, In May 2022, GE Healthcare agreed to invest up to USD 50 million in Israeli firm Pulsenmore, marking another major step forward in enabling precision health. This investment aims to accelerate global acceptance of Pulsenmore's homecare ultrasound solutions while supporting its goal of obtaining FDA clearance and commercial expansion in the United States.

The Middle East and African wireless healthcare market is semi-consolidated. The major players with a significant market share are expanding their customer base across various regions. Players are involved in product development and strategic collaborative initiatives with multiple companies to increase their market share and profitability.

- October 2023: XRP Healthcare, well-known as the first pharmaceutical and healthcare platform built on the XRP Ledger, announced its expansion into the prosperous healthcare markets of Dubai and the Middle East. XRP Healthcare acknowledges the Middle East's progressive and forward-thinking attitude towards blockchain and crypto regulation, which is notably more favorable and progressive than other jurisdictions, including the United Kingdom.
- January 2023: Mindray, a provider of medical devices and solutions, announced its attendance at the esteemed Arab Health 2023 exhibition in the medical field. Mindray introduced its innovative wireless devices designed to cater to the needs of healthcare professionals worldwide. These cutting-edge devices offer a superior portable ultrasound experience, ensuring ease of use in various medical settings and providing exceptional point-of-care ultrasound (POCUS) imaging. The remarkable TE Air device revolutionizes the ultrasound experience by simplifying a complex system into a compact device, while maintaining its capacity to meet the highest clinical standards

Additional Benefits:

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

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