

GCC Health Insurance Market By Insurance Type (Individual, Group), By Service Provider (Public, Private), By Country, Competition, Forecast & Opportunities, 2020-2030F

Market Report | 2025-02-28 | 134 pages | TechSci Research

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Report description:

The GCC Health Insurance Market was valued at USD 18.66 billion in 2024 and is projected to reach USD 25.75 billion by 2030, growing at a CAGR of 5.51% during the forecast period. The market's rapid expansion is driven by rising healthcare costs, increasing expatriate populations, and the implementation of mandatory health insurance policies across Gulf nations. Saudi Arabia and the UAE are leading the sector, supported by strong regulatory frameworks and high healthcare expenditures. Insurers are focusing on developing customized plans and value-added services to enhance the customer experience.

Key Market Drivers

Mandatory Health Insurance Policies

The introduction of mandatory health insurance policies across GCC nations has significantly accelerated market growth. Countries such as Saudi Arabia, the UAE, and Oman have implemented laws requiring expatriates, and in some cases citizens, to have health insurance, thereby driving increased penetration. In Saudi Arabia, the Council of Cooperative Health Insurance (CCHI) mandates coverage for all private-sector employees, while Dubai's Health Insurance Law requires employers to provide coverage for workers. Additionally, Abu Dhabi mandates insurance for all residents through the Thiqa and Daman programs. These regulations ensure universal healthcare access and expand the insured population, resulting in higher demand for health insurance policies.

Key Market Trends

Shift to Value-Based Healthcare and Outcome-Based Insurance Models

The GCC health insurance market is transitioning from traditional fee-for-service models to value-based healthcare, focusing on patient outcomes rather than the volume of services provided. Governments and insurers are increasingly partnering with healthcare providers to adopt models that link reimbursements to treatment effectiveness. This approach aims to reduce unnecessary medical procedures while improving cost efficiency. Saudi Arabia's Vision 2030 emphasizes the need for

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outcome-based healthcare reforms, encouraging insurers to explore alternative payment models, such as bundled payments and capitation. Similarly, the UAE has launched several value-based care initiatives, particularly in Dubai and Abu Dhabi, promoting preventive care. Insurers are integrating wellness programs, chronic disease management, and digital health monitoring tools into their policies to reduce long-term claims and enhance engagement with policyholders. This trend is driving insurers to offer personalized health plans that incentivize healthier lifestyles, ultimately reducing overall healthcare expenditure.

Key Market Players

- Bupa Global
- Tawuniya
- Al Rajhi Takaful
- Walaa
- MEDGULF
- AXA Cooperative
- Malath Insurance
- Wataniya Insurance
- Al Etihad Cooperative
- MetLife Services and Solutions LLC

Report Scope

This report segments the GCC Health Insurance Market based on the following categories, along with a detailed analysis of industry trends:

-□By Insurance Type:

- o□Individual
- o□Group

-□By Service Provider:

- o□Public
- o□Private

-□By Country:

- o□Saudi Arabia
- o□UAE
- o□Qatar
- o□Oman
- o□Bahrain
- o□Kuwait

Competitive Landscape

Company Profiles: This section offers a detailed analysis of the major companies operating in the GCC Health Insurance Market.

Available Customizations:

TechSci Research offers customization options for the GCC Health Insurance Market report to cater to specific company needs.

The following customization options are available:

-□Company Information:

- o□Detailed analysis and profiling of additional market players (up to five).

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