

EXTERNAL DEFIBRILLATORS

INVESTMENT OPPORTUNITY SCORECARD

HEALTHCARE AND LIFE SCIENCES

September 2021

High Potential

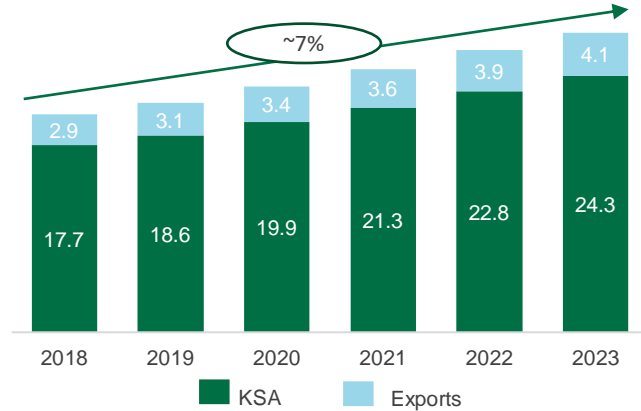
Moderate Potential

Low Potential

OPPORTUNITY'S DESCRIPTION: The localization of assembly step and part of the sub assembly manufacturing step of defibrillators¹ in KSA

DEMAND

ADDRESSABLE KSA / REGIONAL MARKET DEMAND, \$ MN



INVESTMENT OVERVIEW

THERAPEUTIC APPLICATION

- External defibrillators market is mainly driven by rise in incidence of cardiovascular diseases, mainly strokes, surge in geriatric population as well as trauma

VALUE PROPOSITION

- KSA has a solid foundation for its healthcare sector through well established ecosystem and incentive schemes for foreign OEMs entering the local market
- KSA is the largest spender on healthcare across the MENA region. The 2019 budget allocated more than \$45.86 Bn for Health and Social Development
- KSA has more than 495 hospitals, with a capacity of more than 76K beds

MARKET OVERVIEW

MARKET READINESS – CURRENT IMPORTERS

The Kingdom is currently covered by a network of distributors and local subsidiaries

CURRENT IMPORTERS

USA accounts for 32% of the supply, Mexico, Germany, China each account for 17%, 13% and 9% of the supply.

EXISTING CAPABILITIES

No assembly factory in Kingdom currently. Capabilities exist to localize part of the assembly (control box, electrodes, assembly)

RAW MATERIALS:

- Control box (polystyrene)
- microelectronics
- electrodes (titanium, tin, silicone)
- battery construction

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