

# NON COATED AND COATED DRESSINGS

INVESTMENT OPPORTUNITY SCORECARD

HEALTHCARE AND LIFE SCIENCES

September 2021



High Potential

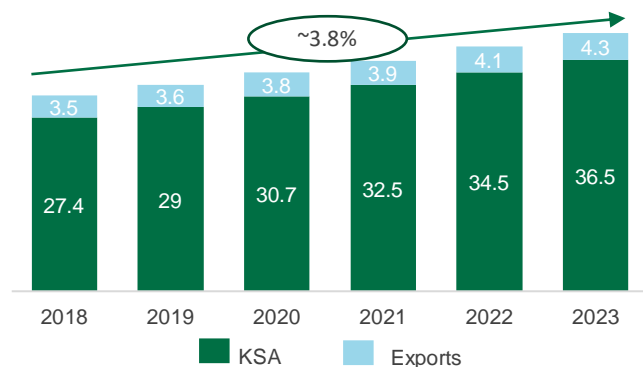
Moderate Potential

Low Potential

**OPPORTUNITY'S DESCRIPTION:** The localization of coated and non coated dressing manufacturing and packaging in KSA

### DEMAND

ADDRESSABLE KSA / REGIONAL MARKET DEMAND, \$ MN



### INVESTMENT OVERVIEW

#### THERAPEUTIC APPLICATION

- Non coated and coated dressings are used in a variety of purpose from wound cover to purposes like pain relief depending on the coating used on the dressing

#### 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 mostly covered by a network of distributors and local subsidiaries, along with less than 3 known local manufacturers

#### CURRENT IMPORTERS

China accounts for 29% of the supply, 23% UK, 18% USA, Germany 12% and the rest is supplied by a mix between Western Europe and Asia

#### EXISTING CAPABILITIES

- Technology available in kingdom
- Need to boost local production and uptake
- Need to further strengthen raw material SC

#### RAW MATERIALS:

- Nonwoven absorbent fibers
- Coatings like sodium alginate and calcium alginate

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