

STERILIZERS AND PARTS

INVESTMENT OPPORTUNITY SCORECARD

HEALTHCARE AND LIFE SCIENCES

MONTH 2020

High Potential

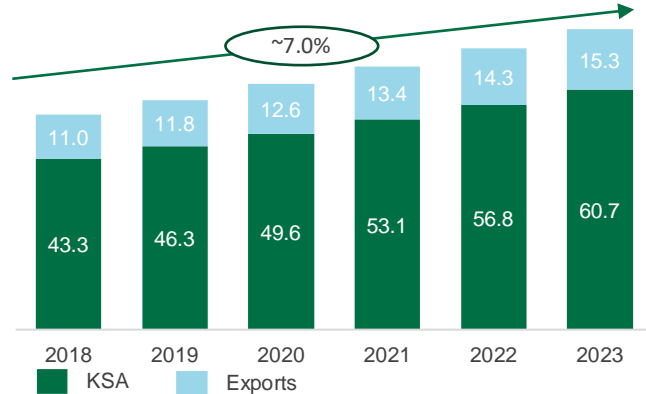
Moderate Potential

Low Potential

OPPORTUNITY'S DESCRIPTION: The localization of assembly and manufacturing of sterilizers and parts

DEMAND

ADDRESSABLE KSA/ REGIONAL MARKET DEMAND(\$mn)



INVESTMENT OVERVIEW

THERAPEUTIC APPLICATION

- Sterilizers are used in medical labs and surgical wards to disinfect and clean instruments and products and ensure there are no cross-contaminations

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, with no known local suppliers

CURRENT IMPORTERS

USA accounts for 24% of the supply, Germany 18%, Italy 11%, Mexico 8%, and the rest is supplied by a mix between mainly Western Europe and some Asian countries

EXISTING CAPABILITIES

- Technology partially available in kingdom (metal parts)
- Need to import and assemble microelectronics and batteries

RAW MATERIALS:

- 316L or Nickel-Clad (inner)
- 304L or Carbon Steel (outer)
- 316L stainless steel
- Microelectronics

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