



## DIGITAL HEALTH AND MEDTECH SECTOR

### BRIEF LANDSCAPE OF PAKISTAN'S HEALTHCARE MARKET

Pakistan's digital health sector is growing rapidly, offering immense opportunities for innovation and collaboration. With increasing demand for telemedicine, health tech solutions, and digital health platforms, Swiss companies can play a pivotal role in revolutionizing healthcare in Pakistan. Explore the dynamic potential and make a lasting impact on the health landscape in this factsheet.

#### COUNTRY SECTOR PROFILE

**12M CHF**  
Budget allocated for Health Care  
spending in FY 24

**64%**  
Population below 29 of age

**240M**  
Population

**30%**  
Population between 15 – 29 years.

**5<sup>th</sup> Largest**  
Populated Country

**2.6%**  
Population Growth

**1.4%**  
Spent on Health Care in 2022 of total GDP

#### HEALTHCARE INFRASTRUCTURE

Public and private health care systems run in parallel. The public sector, led by the Ministry of Health until recently, has deferred to the provinces for issuance of healthcare to the general population. The administrative and fiscal space of provinces has increased manifold with simultaneous increases in their responsibilities, however they remain deficient in health workforce and facilities, relative to the size of the population.

The public sector health services are provided at federal, provincial, and district levels through a well-established network of rural health centers, basic health units, and allied medical professionals. The health profile of Pakistan is characterized by high population growth. The rising population pressure on state health institutions has allowed the private sector to bridge the gap of rising demand and limited public health facilities.



The private sector plays a vital role in the delivery of healthcare services in Pakistan. Most private hospitals, clinics, and health related facilities are in urban areas and are well-equipped with modern diagnostic facilities. These private healthcare options are in greater demand than healthcare available through the public sector.

### REGISTERED MEDICAL AND PARAMEDICAL PERSONNEL

Health Manpower (in Nos.)	2016	2017	2018	2019	2020	2021	2022
Doctors	195,896	208,007	220,829	233,261	245,987	266,430	282,383
Dentists	18,333	20,463	22,595	24,930	27,360	30,501	33,156
Nurses	99,228	103,777	108,474	112,123	116,659	121,245	127,855
Midwives	36,236	38,060	40,272	41,810	43,129	44,693	46,110
Lady Health Workers	17,384	18,400	19,910	20,565	21,361	22,408	24,022

**Note:** Data is reported on Calendar Year Basis  
**Source:** Pakistan Bureau of Statistics

### PUBLIC HEALTH SYSTEM

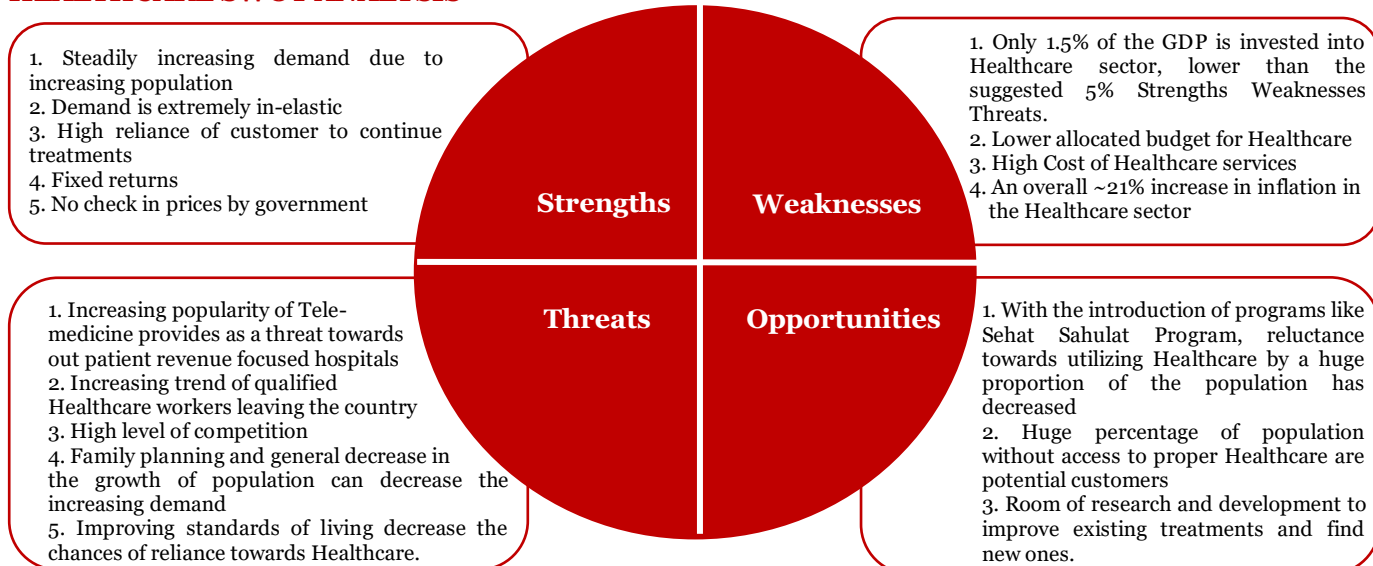
The Sehat Sahulat Card initiative by the Government of Pakistan is a beacon of hope and inclusivity in the nation's healthcare landscape. This visionary program extends essential health coverage to marginalized communities, ensuring access to quality medical services without financial barriers. Through the Sehat Sahulat Card, families across Pakistan gain the peace of mind knowing that they can seek treatment for various ailments, from routine check-ups to critical procedures, without worrying about exorbitant costs. This initiative not only promotes health equity but also fosters a healthier and more resilient society, empowering individuals to lead productive lives free from the burdens of medical expenses. Moreover, people spent more than the government on healthcare.

More than half of all healthcare spending 'out of pocket' (OOP). OOP spending is a payment by households directly to providers to obtain services and health products. It includes purely private transactions (individual payments to private doctors and pharmacies), official patient cost-sharing within defined public or private benefit packages, and informal payments.

### PRIVATE HEALTH SYSTEM

Pakistan has a large private health sector which is very much entrenched in the DNA of the country's health system. Overstretched government delivery systems, because of the increasing population and inadequately staffed and stocked government facilities, have led to private providers filling the service gaps for the affluent, the poor, and the struggling middle class alike.

### HEALTHCARE SWOT ANALYSIS



## **INNOVATION AND TECHNOLOGY TO IMPROVE THE LIVES AND RIGHTS OF WOMEN**

The United Nations Population Fund has introduced telemedicine facilities to make reproductive health care more accessible to women and girls, as well as the introduction of an animated ChatBot that uses artificial intelligence and preprogrammed content to educate young girls about menstruation and other women's health issues. On International Women's Day they started a program under the theme "[DigitALL: Innovation and technology for gender equality](#)", shedding light on how digital innovation and technology can promote gender equality and improve the lives of women and girls, particularly for the marginalized and vulnerable.

### **AIR AMBULANCES**

Pakistan's recent initiative to launch air ambulances marks a significant step forward in the country's healthcare infrastructure. The introduction of air ambulances addresses the need for rapid and efficient medical response, especially in remote areas with limited access to hospitals. These air ambulance services utilize helicopters or fixed-wing aircraft equipped with state-of-the-art medical equipment and staffed by skilled medical personnel, including doctors and paramedics.



### **LARGEST VOLUNTEER AMBULANCE ORGANIZATION**

Pakistan has one of the world's largest Ambulance Network as Pakistan Edhi Foundation, which began in 1948 ferrying injured people to the hospital. Pakistan's Edhi Foundation, is listed in the Guinness Book of World Records for running the world's largest ambulance network. The Edhi Foundation is a non-profit financial aid program in Pakistan.

The Edhi Foundation conjointly incorporates a variety of branches in varied countries together with United Kingdom, Canada, Japan, U.S.A. and Bangladesh, where they accommodate and provide relief to refugees.

### **INNOVATION IN PAKISTAN HEALTH CARE**

The digital health market is growing rapidly in Pakistan. Pakistanis are shifting their medical consultations & purchases to online platforms like DVAGO Pharmacy & Wellness Experts, Daawai (Medicine in Urdu Language), etc. Pakistan's emerging digital health landscape provides a wide range of opportunities for Swiss digital health solutions and areas for business partnerships and collaborations.

The first-ever robotic surgery in Pakistan was successfully performed at the Pakistan Kidney and Liver Transplant Institute (PKLI) in Lahore, marking a significant milestone in the country's medical history.

This groundbreaking procedure involved a radical nephrectomy, the surgical removal of a kidney. The use of robotic technology in this surgery offered unparalleled precision, minimizing the risks and enhancing the overall outcome. Remarkably, the patient experienced a swift recovery, allowing them to return home just a few hours post-surgery. This advancement not only highlights the capabilities of PKLI but also sets a new standard for surgical procedures in Pakistan.



The success of this procedure underscores the potential for robotic surgery to become a common practice in Pakistan, improving patient outcomes and reducing recovery times significantly. As the healthcare sector in Pakistan continues to evolve, the integration of such advanced technologies is expected to enhance the country's medical infrastructure, attracting more patients and fostering a culture of continuous improvement and excellence in healthcare.

### **KEY HEALTH SECTOR INTERVENTIONS AND INITIATIVES BY THE GOVERNMENT DURING FY23**

The government has been committed towards mobilization of all available resources to achieve third SDG. Universal Health Coverage (UHC) ensures that every single individual gets quality healthcare without facing any financial hardship. In this regard, various initiatives have been undertaken by the federal and provincial governments to achieve the UHC targets which majorly include national and provincial Essential Package of Health Services for different levels of healthcare delivery, World Bank supported National Health Support Program. Other initiatives of the government are as follows:



- Integrated disease surveillance response system
- National health support
- Essential package of health services
- Extended program for immunization
- National TB control program
- Polio eradication program
- Malaria control efforts
- National aids control program
- Cancer treatment
- Regulating healthcare

The federal government allocated **Rs24.21 billion (8 Mio. CHF)** for the healthcare sector for the financial year 2023-24 as compared to Rs22.49 billion allocated during FY23, while a sum of **Rs13 billion (4 Mio. CHF)** to be spent to uplift the sector under the public sector development budget.

### **MEDICAL DEVICE BUSINESSES OPERATING IN PAKISTAN**

Pakistan has a number of businesses operating in medical device sector. A list of entities is provided below: Multinational corporations operating in Pakistan’s Medical Device Market:

- Abbott Laboratories (Pakistan) Limited
- B. Braun Pakistan (Pvt) Ltd.
- Eli Lilly Pakistan (Pvt) Ltd.
- Fresenius Medical Care Pakistan (Pvt) Ltd.
- Intra Health International
- Johnson & Johnson Pakistan (Pvt) Ltd.
- Martin Dow Marker Specialities (Pvt) Ltd
- Medtronic Pakistan (Private) Limited
- Muller & Phipps Pakistan (Pvt) Ltd.
- Otsuka Pakistan Limited
- Roche Pakistan Limited
- The Searle Company Limited

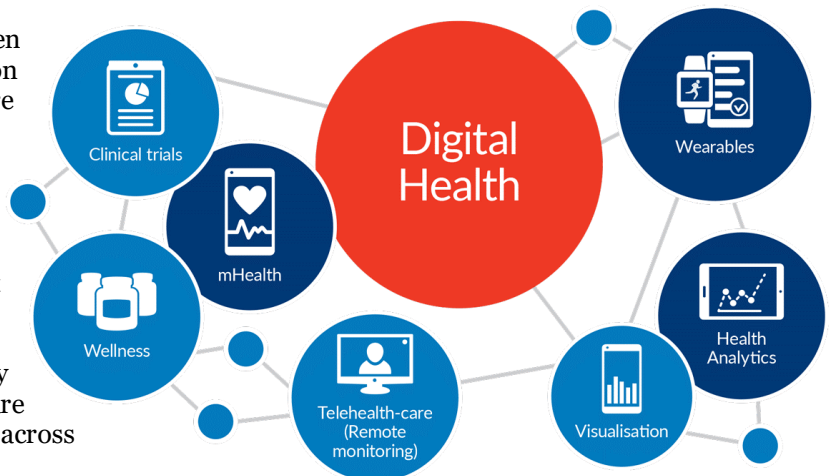
The Pakistani healthcare providers purchase most of their diagnostic and imaging equipment supplies from a handful of multinational companies. In the pathology segment, it is estimated that more than half of equipment demand of Pakistani hospitals and laboratories is met by MNCs like Siemens, Abbot and Roche. In radiology segment, MNCs like General Electric, Philips, Siemens and Hitachi provide majority of imaging machines.

### **DIGITAL HEALTH PLATFORMS**

Digital health platforms in Pakistan have been experiencing significant growth and adoption in recent years, transforming the healthcare landscape in the country.

These platforms in Pakistan are revolutionizing healthcare delivery by leveraging technology to improve accessibility, efficiency, and patient outcomes.

As these platforms continue to evolve, they have the potential to address healthcare challenges and enhance the quality of care across the country.



There are **450+ HealthTech** in Pakistan some of which include:

**DAWAAI** is a digital health platform that operates as an online pharmacy in emerging Asia. Provider of an online store for the purchase of medicines and healthcare products.



**SEHAT KAHANI** is a teleconsultation healthcare service provider enlisting only female doctors to treat patients. The Company has opened an E-healthcare center that is equipped with ICT (information & communication technologies) to connect the patients to the health micro entrepreneurs via telemedicine software.



**MARHAM** offers appointment booking, a Q&A forum, and a health blog for consumers to make better-informed health decisions. The app allows users to compare doctors and



book appointments. One of Pakistan's most trusted platform to find doctors, book appointment, or consult online with the top specialist doctors across Pakistan.

**DVAGO** is a prominent pharmacy chain in Pakistan that offers a wide range of pharmaceutical products and healthcare services. DVAGO plays a significant role in the healthcare sector in Pakistan by providing convenient access to essential medications and healthcare services while emphasizing quality, professionalism, and community involvement.



### **PRESENCE OF SWISS FIRMS**

Pakistan's healthcare market presents immense potential and opportunities for growth, driven by factors such as a large and growing population, increasing health awareness, and ongoing healthcare infrastructure developments. With a focus on improving healthcare accessibility and quality, Pakistan has attracted Swiss MNCs like Roche, Parazelsus, and Novartis, showcasing the country's evolving healthcare system. These companies' direct presence reflects the confidence in Pakistan's healthcare sector and its potential for innovation and collaboration. Other Swiss SMEs having active presence in the sector are also known to be available through Pakistani representatives. As the demand for advanced medical services, pharmaceuticals, and healthcare technologies continues to rise, Pakistan's healthcare market emerges as a promising arena for both local and international stakeholders to contribute to improving healthcare outcomes and addressing the evolving needs of the population.

### **SWISS FIRMS JOINING HANDS WITH PAKISTANI GOVERNMENT**

The collaboration between a Swiss firm, Roche Pharmaceuticals and the Pakistan government to provide free treatment to cancer patients marks a significant step towards improving healthcare accessibility and affordability in the country. This partnership showcases the importance of international cooperation in addressing critical healthcare needs, particularly in combating life-threatening diseases like cancer.

By offering free treatment, this initiative not only supports patients and their families but also contributes to the broader goal of enhancing healthcare outcomes and reducing the burden of disease in Pakistan. It underscores the potential for innovative solutions and partnerships to make a meaningful impact on public health challenges. Other Swiss Firms can also find the same opportunities in Pakistan as Roche, Parazelsus, and Novartis.

### **UPCOMING CONFERENCES IN PAKISTAN 2024**

**Health Asia International Exhibition & Conferences 2024 (17 - 19 Oct 2024) Expo Center, Karachi, Pakistan:** Pakistan's largest annual event for the health and medical industry, featuring displays of medical equipment, surgical instruments, hospital equipment, pharmaceuticals, and more.



**Pak Pharma & Healthcare Expo 2024 (15 - 16 Oct 2024) Pakistan-China Friendship Centre, Islamabad, Pakistan:** The Pak Pharma & Healthcare Expo is a conference and exhibition which intends to serve as a source of providing business opportunities to the various stakeholders in the pharmaceutical industry of Pakistan, enhance the exposure of local manufacturers to the international participants and visitors to the exhibition, and much more.



**Beauty & Fitness Asia 2024 (12 - 15 Dec 2024) Expo Center, Karachi, Pakistan:** An exhibition for cosmetics, beauty equipment, and perfumes. It is a platform for industry experts to learn new skills and network. The event showcases many brands and technologies for hair, skin, and personal care.



### **CONCLUSION:**

In conclusion, the MedTech sector of Pakistan offers opportunities for growth in various areas. It opens a pathway to sharing knowledge, expertise, and capital, paving the way for a more prosperous and innovative era in Pakistan's Medical Technology Sector.

### **HOW S-GE CAN SUPPORT**

We would be delighted to support you in your expansion plans to Pakistan and connect you with the appropriate business partners. Our renowned experts in Zurich work closely with the Embassy and our specialists at the Trade Point in Pakistan, ensuring that you benefit from firsthand information. We look forward to hearing from you!

## GET IN TOUCH



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