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# The Western Cape Advantage: South Africa's Leading Healthcare Hub



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# Introduction

The Western Cape, a province of South Africa, stands at the forefront of healthcare innovation and excellence in Africa. Positioned as a strategic healthcare hub, it combines a robust economy, advanced medical infrastructure, and pioneering technology to cater to local plus international healthcare demands.

## South Africa's overall healthcare system ranks 50th among 94 countries on the 2024 Global Healthcare Index, a testament to its evolving global status.

The nation allocates 8.6% of its GDP to healthcare, surpassing the global average of 7-8%, according to the WHO's Global Health Expenditure Database. Additionally, South Africa has emerged as a prominent destination for medical tourism, driven by affordable care, skilled professionals, and high-quality standards. Between 2018 and 2023, approximately 27,458 medical tourists sought treatments in South Africa, predominantly from SADC countries, East and Central Africa, West Africa, along with Asia, as reported by Stats SA.

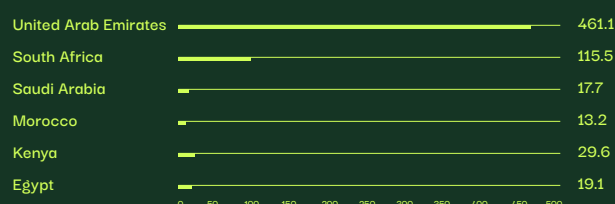
Within this landscape, the Western Cape distinguishes itself as a regional leader. **It houses world-class medical facilities, a cutting-edge Provincial Health Data Centre, and employs SNOMED CT—the world's most comprehensive health terminology.** The province's adoption of interoperable electronic health records underscores its commitment to leveraging digital health technologies for improved care delivery. Consistently achieving unqualified audits from the Auditor-General further highlights the region's exceptional healthcare governance.

The Western Cape Department of Health and Wellness

exemplifies the region's innovative approach to healthcare management, using data-driven strategies to guide decision-making and fund allocation for health services. This commitment to innovation is further reflected in the presence of leading public-sector tertiary hospitals, such as Tygerberg and Groote Schuur, which serve the entire province with excellence. Wellness Hubs across the Western Cape provide essential preventive care services, which include family planning, chronic disease screening, child health services, and HIV/TB screening, contributing significantly to reducing lifestyle-related diseases.

In addition, the Department's low medico-legal claim values reflect a culture of precision and high standards in patient care, solidifying the Western Cape's reputation for quality plus reliability. These attributes position the province not only as a cornerstone of South Africa's healthcare system but also as a preferred destination for healthcare investment, innovation, and medical tourism across Africa.

### Inbound Medical Tourism Expenditure in Middle East and African Countries 2024, USD million





## Market Overview

The Western Cape Department of Health and Wellness is responsible for providing public healthcare to the population of over 7.4 million. As a major hub for medical devices and healthcare companies, **the region's health technology sector contributes a significant USD 93.8 million to the provincial economy.** Offering a mix of public and private healthcare services, the Western Cape boasts premier private hospitals such as Mediclinic Cape Town, Netcare Christiaan Barnard Memorial Hospital, and St. Augustine's Hospital, renowned for their specialised services along with shorter waiting times. **In 2023/24, the province's total healthcare budget was USD 1,638 million (R29.7 billion), underlining its commitment to maintaining and improving healthcare infrastructure.**

The province is particularly focused on bolstering the Expanded Programme on Immunisation (EPI), a cornerstone of its preventive healthcare strategy. Community-Oriented Primary Care (COPC) initiatives will be expanded to enhance population outreach, foster inter-sectoral collaboration, and encourage community participation. Efforts are also being made to integrate mental health responses, combat tuberculosis, as well as address violence prevention, ensuring a holistic and proactive approach to healthcare delivery.

## Healthcare Ecosystem







The Road to Wellness, also known as Healthcare 2030, serves as the blueprint for transforming the health system in the Western Cape. It prioritises prevention, early detection, and a holistic approach to wellness.

The Western Cape Department of Health (WCDoH) manages the province's public healthcare system, which includes 33,350 healthcare staff, 65% of whom are professionals. The province offers advanced services such as nuclear medicine, including Positron Emission Tomography and Computed Tomography (PET/CT) scans,

### Public Healthcare Expenditure in Western Cape, USD million

Programme	2020/21	2021/22	2022/23
Administration	65.3	78.1	58.3
District Health Services	628.8	643.0	664.9
Emergency Medical Services	63.7	68.5	71.9
Provincial Hospital Services	224.0	235.9	248.9
Central Hospital Services	399.6	414.3	437.9
Health Sciences and Training	17.5	18.9	21.1
Healthcare Support Services	29.4	30.1	32.3
Health Facilities Management	60.7	52.9	61.6
<b>Total</b>	<b>1489.4</b>	<b>1542.1</b>	<b>1597.2</b>

### Number of Facilities

Current/Future (2040)	M-Metro R-Rural
 PHC 54M & 195R/253	 Central / Tertiary 54M & 195R/253
 EMS 7m & 50R / 65	 Other Facilities 24M 42R/70
 Regional & Specialised Hospitals 8M 7R/17	 District Hospitals 8M & 25R 36

\* Includes FPLs, Laundries, Workshops, Stores, Nursing Colleges, Residential Accommodation, etc.  
Source: Static.pmg.org.za

for both diagnostic as well as therapeutic purposes. Minimally invasive techniques like cryobiopsy and robotic surgery systems further enhance its diagnostic plus treatment capabilities.

Robotics plays a key role in addressing healthcare needs in remote areas. The TeleICU pilot project, a partnership between George Regional and Groote Schuur Hospitals, provides real-time critical care through robotic devices. Similarly, the USAID ACCELERATE 2 Project has introduced mobile Digital Chest X-ray Services, enabling faster tuberculosis diagnosis and treatment. These advancements, along with other innovations showcased at the WHX Cape Town and WHX Labs Cape Town, connect more than 600 exhibitors with over 8,000 attendees and 3,000 delegates from 60 countries, fostering collaboration and progress in the sector.

To improve medicine safety and accessibility, the University of the Western Cape along with the Institute of Tropical Medicine in Antwerp have established the Centre of Excellence for Pharmacovigilance in Southern Africa (CEPSA). Collaborative efforts also extend to cataract surgeries and dental services in the Garden Route plus Central Karoo Districts, with over 120 surgeries, 300 dental procedures, and professional development workshops conducted through partnerships with Stellenbosch University and other entities.

The Western Cape's health workforce is primarily nurse-driven, with nurses comprising 63.9% of the public healthcare workforce. The province accounts for 14.6% of this figure, the second highest in South Africa after Limpopo, according to the National Department of Health. The Wooltru Healthcare Fund has partnered with local providers to reduce medical claims costs for members, encouraging them to use specific providers to minimise co-payments and avoid high expenses.

Healthcare services are delivered across three levels: Primary Healthcare (PHC), Secondary Healthcare, and Tertiary Healthcare, ensuring comprehensive coverage for the region's diverse needs.



## Investment Potential

### Mega Projects

The Western Cape Department of Health is spearheading mega projects to enhance healthcare infrastructure, including the construction of Klipfontein Regional Hospital, Belhar Regional Hospital, and New Tygerberg Central Hospital. Scheduled for completion by 2033, these projects will be implemented in three phases.

The Klipfontein Regional Hospital, replacing the decommissioned GF Jooste Hospital in Manenberg, will serve communities in Athlone, Gugulethu, Hanover Park, Mitchells Plain, and Philippi.

The Belhar Regional Hospital will cater to the Tygerberg sub-structure, Khayelitsha, and the Stellenbosch sub-district, while the New Tygerberg Central Hospital, with an estimated construction cost of USD 610 million, will become a key facility in the province's healthcare network.

### Disease Landscape

South Africa's implementation of Digital Adherence Technologies (DATs), including smart pill bottles and boxes developed by Wisepill Technologies in Cape Town, is transforming treatment adherence for chronic diseases such as diabetes, tuberculosis, and cardiovascular diseases.

The Western Cape and Gauteng provinces are pivotal in pharmaceutical manufacturing, with Cape Medical Depot in Cape Town playing a key role in supplying medication to public healthcare facilities.

The Western Cape boasts the lowest HIV prevalence in South Africa, at 7.4% in 2022, a significant improvement from 8.6% in 2017. Despite this progress, approximately 540,000 individuals live with HIV in the region.

The province faces a high lung cancer mortality rate, at 27 per 100,000 population, driven by elevated smoking rates, HIV, and occupational exposures. Diabetes, a leading cause of early death, disproportionately affects women, with 75.5% of patients exhibiting poorly controlled blood sugar and an average HbA1c level of 9.0%.

### Emerging Opportunities

Artificial Intelligence (AI) presents opportunities for early detection and diagnosis, particularly in oncology. The rising cancer burden has driven demand for MRI and CT scanners, valued at approximately USD 125 million, with an expected growth rate of 4% by 2028. The market is dominated by U.S. and European firms, but significant opportunities exist for cost-effective plus innovative solutions. Technologies that assist in navigation during surgical interventions are also gaining traction.

### Showcasing Innovations

Visitors to the Africa Health and Medlab Africa Exhibition can explore Cape Town's potential as a healthcare hub. Highlights include Baxter's Vest Advanced Pulmonary Experience (APX) airway clearance system and its Progressa+ ICU Bed, demonstrating the region's ability to host cutting-edge medical innovations.

With its growing infrastructure, advanced disease management strategies, and burgeoning healthcare technology market, the Western Cape solidifies its position as a premier destination for investment and innovation in the health sector.

## Regulatory and Policy Landscape

The Western Cape Department of Health, led by the provincial Minister of Health, has introduced key initiatives to enhance healthcare delivery. The Biovac Institute in Cape Town, a public-private partnership, focuses on high-quality vaccine production. The South African government allocates USD 1.1 billion annually to research, with USD 165 million dedicated to the Western Cape. The province hosts four universities, two academic hospitals, the South African Medical Research Council, plus the Centre for Proteomic and Genomic Research, driving health technology advancements. The Cape Health Technology Park, supported by the Department of Science and Technology, the Western Cape government, along with the City of Cape Town, fosters innovation by uniting academic programmes, government entities, and businesses.

### Western Cape Provincial Health Data Centre (PHDC)

The PHDC integrates clinical data through patient registration systems, unique identifiers, and digital platforms to improve care. Strictly regulated under the National Health Act and Protection of Personal Information Act, the PHDC enables clinicians to access consolidated patient data as well as identify individuals needing care. The platform also supports operational analyses and epidemiological studies, ensuring governance over sensitive information.

### Notable Healthcare Institutions

Cape Town houses the International Centre for Genetic Engineering and Biotechnology, which researches life sciences as well as diseases like HIV/AIDS, malaria, and cancer. The province's universities, including the University of Cape Town, Stellenbosch University, Cape Peninsula University of Technology, and the University of the Western Cape, invest heavily in research. The University of Cape Town's Department of Medicine operates 18 divisions along with 10 specialised research units in collaboration with global teams. Stellenbosch University's Biomedical Research Institute, supported by a billion-rand investment, targets prevalent diseases in South Africa and across Africa.

### Health Insurance Policy

The National Health Insurance (NHI) initiative seeks to ensure universal health coverage by uniting public and private healthcare resources. About 15% of South Africans currently rely on private healthcare. The NHI system is expected to reduce the share of private healthcare services, and the South African government could become the primary purchaser of healthcare products and services, while also overseeing price regulation.

## Outlook: Shaping the Western Cape's Healthcare Future

The Western Cape's healthcare industry is expanding, driven by economic growth, technological innovation, and increasing demand for services. Telemedicine, mobile health applications, and digital platforms are improving access, particularly in remote areas. Cape Town continues to lead as a biotechnology hub, fostering advancements in medical technologies.

Despite challenges such as limited resources and staff shortages, government efforts to expand infrastructure, especially in underserved communities, are improving accessibility. Investments in traditional training and emerging fields like digital health plus research are addressing workforce gaps, creating opportunities in nursing, allied health, and specialised medical sectors.

The rise in non-communicable diseases and greater focus on mental health present growth opportunities for healthcare providers, insurers, as well as medical technology manufacturers. Public-private partnerships and infrastructure investments are key to sustaining this momentum.

As the Western Cape strengthens its position as Africa's leading healthcare hub, platforms like the **WHX Cape Town** and **WHX Labs Cape Town** will play a vital role in highlighting innovations and shaping the continent's healthcare future.



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