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# 2023 Healthcare Market Insights - West Africa

Report by Medic West Africa and Medlab West Africa

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# Market synopsis

In recent years, West Africa has seen an increase in investment in laboratory infrastructure, notably in healthcare and medical research. This has resulted in the creation of new laboratories, the improvement of existing facilities, and the extension of laboratory services.

West Africa's healthcare industry is expanding, with an emphasis on enhancing healthcare services and infrastructure. This includes laboratory investments to assist illness diagnosis, research, and treatment. Furthermore, there is a greater understanding of the role of laboratory testing in healthcare, notably in infectious illnesses, maternity and child health, and noncommunicable diseases.

**Here is a brief market synopsis of the healthcare market in West Africa:**

**Market size and growth:** As per a research report by Research and Markets, Africa In Vitro Diagnostics (IVD) market is expected to grow at a CAGR of 4.8% from 2022 to 2029 to reach \$1.78 billion by 2029.

**Demand for Healthcare services:** Laboratory equipment and supplies are in high demand in West Africa. Investing in firms that provide laboratory supplies and equipment can prove to be a profitable enterprise.

With a rising population and increased demand for healthcare services, West Africa need well-equipped medical testing facilities. Investing in such labs might be advantageous, especially in nations with underdeveloped healthcare systems.

**Healthcare infrastructure:** Increasing the number of healthcare personnel is one area of interest to strengthen West African health infrastructure. Many of the region's countries have a serious lack of physicians, nurses, and other healthcare workers. To remedy this, efforts are being undertaken to increase the number of medical schools, provide financial incentives to healthcare personnel, and create programs to train community health workers.



Another area that requires focus is enhancing rural access to healthcare services. Many people in West Africa live in isolated locations with little access to healthcare. To remedy this, mobile clinics and telemedicine programs are being created to give healthcare to those living in rural regions.

**Investment Opportunities:** Investing in medical research facilities focused on cutting-edge research in fields such as genetics, biotechnology, and drug discovery might be a profitable investment in West Africa. With a rising need for novel medical solutions to local health concerns, well-equipped research facilities may play an important role in developing healthcare in the region.

Telemedicine and e-health are gaining traction in West Africa as technology advances. Investing in laboratory services that support telemedicine and e-health efforts, such as remote diagnostics, tele-pathology, and remote monitoring, may prove to be a good investment in the region.



# Countries overview

## Nigeria

Nigeria is West Africa's largest economy and a prominent player in the laboratory industry. Because of its enormous population, rising illness incidence, and developing healthcare system, the country's demand for laboratory services is increasing. Laboratory testing in fields such as clinical diagnostics, pathology, microbiology, hematology, and molecular diagnostics is in high demand. Private laboratories, government-run laboratories, and laboratory services offered by hospitals and healthcare organizations drive the market.

### Number of healthcare facilities

According to Nigeria Health Facility Registry (HFR), there are total of 22,978 licensed healthcare facilities in Nigeria with a split of 16,359 (71.19%) public healthcare facilities and 6,619 (28.80%) private healthcare facilities.

### Universal Health Coverage

The National Health Insurance Authority (NHIA), formerly known as the National Health Insurance Scheme (NHIS), is a government-run health-care system. The federal government of Nigeria formed it under the NHIA Act 2022 to increase access to excellent and affordable healthcare for all Nigerians. The President signed the NHIA Act, which abolished the old NHIS legislation, into law on Thursday, May 19, 2022. The law requires NHIA to guarantee that health insurance is required for all Nigerians and legal residents, to promote, regulate, and integrate health insurance systems in the nation, and to increase and harness private sector engagement in the provision of health care services. The long-term objective is to ensure that all Nigerians have Universal Health Coverage (UHC).

### Investments

In Nigeria, the healthcare system is predominantly supported by public sources such as government budget allocations and donor financing, as well as patient out-of-pocket expenditures. The government has made steps to develop health insurance plans, but coverage remains restricted, and many Nigerians continue to struggle with healthcare affordability.

The Nigerian government established the Basic Healthcare Provision Fund (BHCPF) in 2018, a special fund committed

to delivering basic healthcare services to all Nigerians. The BHCPF is supported by the government as well as other sources, including donor agencies, and is anticipated to help Nigeria achieve UHC. The government gave N44.5 billion (about USD 115 million) to the BHCPF in 2020. In 2021, the government allocated N35.4 billion (approximately USD 92 million) for the construction of health infrastructure across the country.

The government has allocated N1.17 trillion in the 2023 proposed budget. An increase of 1.05% from 4.7% allocated in 2022 to 5.75% in 2023.

### Healthcare and trade regulation environment

**Regulatory Bodies:** The National Agency for Food and Drug Administration and Control (NAFDAC) is the primary regulatory body responsible for regulating and monitoring pharmaceuticals, food, and beverages in Nigeria. The National Health Insurance Scheme (NHIS) is responsible for regulating health insurance in the country.

**Trade Agreements:** Nigeria is a signatory to a number of regional and international trade treaties, including the Economic Community of West African States (ECOWAS) and the African Continental Free Trade Agreement (AfCFTA). These agreements are intended to enhance trade and economic cooperation among member nations, but they often include regulatory restrictions and obligations. **Trade Agreements:** Nigeria is a signatory to a number of regional and international trade treaties, including the Economic Community of West African States (ECOWAS) and the African Continental Free Trade Agreement (AfCFTA). These agreements are intended to enhance trade and economic cooperation among member nations, but they often include regulatory restrictions and obligations.

**Import and Export Regulations:** Nigeria has an intricate system of import and export laws in place to safeguard local companies while also ensuring the safety and quality of imported goods. Import taxes, customs charges, and other trade obstacles can all have an influence on the cost and availability of goods in the nation.



# Ghana

The laboratory market in Ghana is developing as a result of increased investment in healthcare infrastructure and services. Factors such as increasing preventative healthcare awareness, sickness incidence, and enhanced healthcare access drive the demand for laboratory testing. Private labs, government-run laboratories, and laboratories inside hospitals and clinics are the main players in the Ghanaian laboratory business. Medical equipment utilized in Ghana is entirely imported, and demand is still growing, with more and more health institutions opening, but at a lower rate than the actual need. More crucially, the import of medical equipment and devices is largely duty-free.

## Number of healthcare facilities

As per ghanahospitals.org there are 1,812 public hospitals, 1,356 private hospitals and 204 mission healthcare facilities (Christian Health Association of Ghana).

## Universal Health Coverage

In recent years, Ghana has made tremendous progress towards obtaining Universal Health Coverage (UHC). Ghana established the National Health Insurance Scheme (NHIS) in 2003, which is a publicly financed health insurance scheme aiming at providing equal access to healthcare services for all residents. The National Health Insurance Program (NHIS) covers a wide variety of healthcare services, including primary care, specialty care, hospitalization, and pharmaceuticals. In 2020, the government allocated GHS 2.2 billion (approximately USD 382 million) to the NHIS.

Over 12 million Ghanaians (roughly 42% of the population) are enrolled in the NHIS as of 2022, contributing to major advances in healthcare access and outcomes in the country. According to the World Bank, Ghana has achieved significant progress in recent years in lowering maternal and child death rates, boosting immunization coverage, and improving access to basic health services.

## Investment

As per UNICEF, in 2022 the government has allocated 8% of total budget towards the Ministry of Health for funding and delivery of health services. As per World Bank, in 2019 the government spent 3.42% of GDP on health expenditure. In 2020, the government allocated GHS 700 million (approximately USD 121 million) for the recruitment and training of healthcare workers.

## Healthcare and trade regulation environment

**Healthcare Provider Regulation:** The Ghana Health Service (GHS) is the primary government body in charge of regulating and providing healthcare services in Ghana. It establishes



standards for healthcare institutions and personnel, grants licenses and permits, and supervises regulatory compliance.

**Import and Export of Medical goods:** In Ghana, the Food and Drugs Authority (FDA) is the primary regulatory authority in charge of the importation, exportation, and sale of medical items and equipment. Through registration, licensing, and post-market surveillance, the FDA ensures the quality, safety, and efficacy of medical items such as medicines, medical devices, and food supplements.

**Trade Accords:** Ghana is a member to both the African Continental Free Trade Area (AfCFTA) and the Economic Community of West African States (ECOWAS), which are both regional trade pacts. These agreements may have an influence on healthcare and trade rules, including tariffs, customs processes, and regulatory harmonization. They aim to enhance trade and economic integration among member nations.



# Benin

## Number of healthcare facilities

According to the World Health Organization's (WHO) Global Health Observatory, the following is the breakdown of healthcare facilities in Benin between private and public as of 2022:

## Public Healthcare institutions

Benin has 1,298 public healthcare institutions, accounting for approximately 83 % of all healthcare facilities in the nation. The government owns and operates these facilities, which provide healthcare to the general public.

## Private Healthcare institutions

Benin had 269 private healthcare institutions, accounting for approximately 17 % of all healthcare facilities in the nation. Private persons or organizations own and run these institutions, which provide healthcare services for a charge.

## Universal Health Coverage

Benin's government published its National Health Development Plan (NHDP) for 2019-2023 in 2019, with the goal of achieving UHC and improving health outcomes for all Beninese people. The plan prioritizes the expansion of health infrastructure and the recruitment and training of healthcare personnel, as well as the improvement of health systems and services.

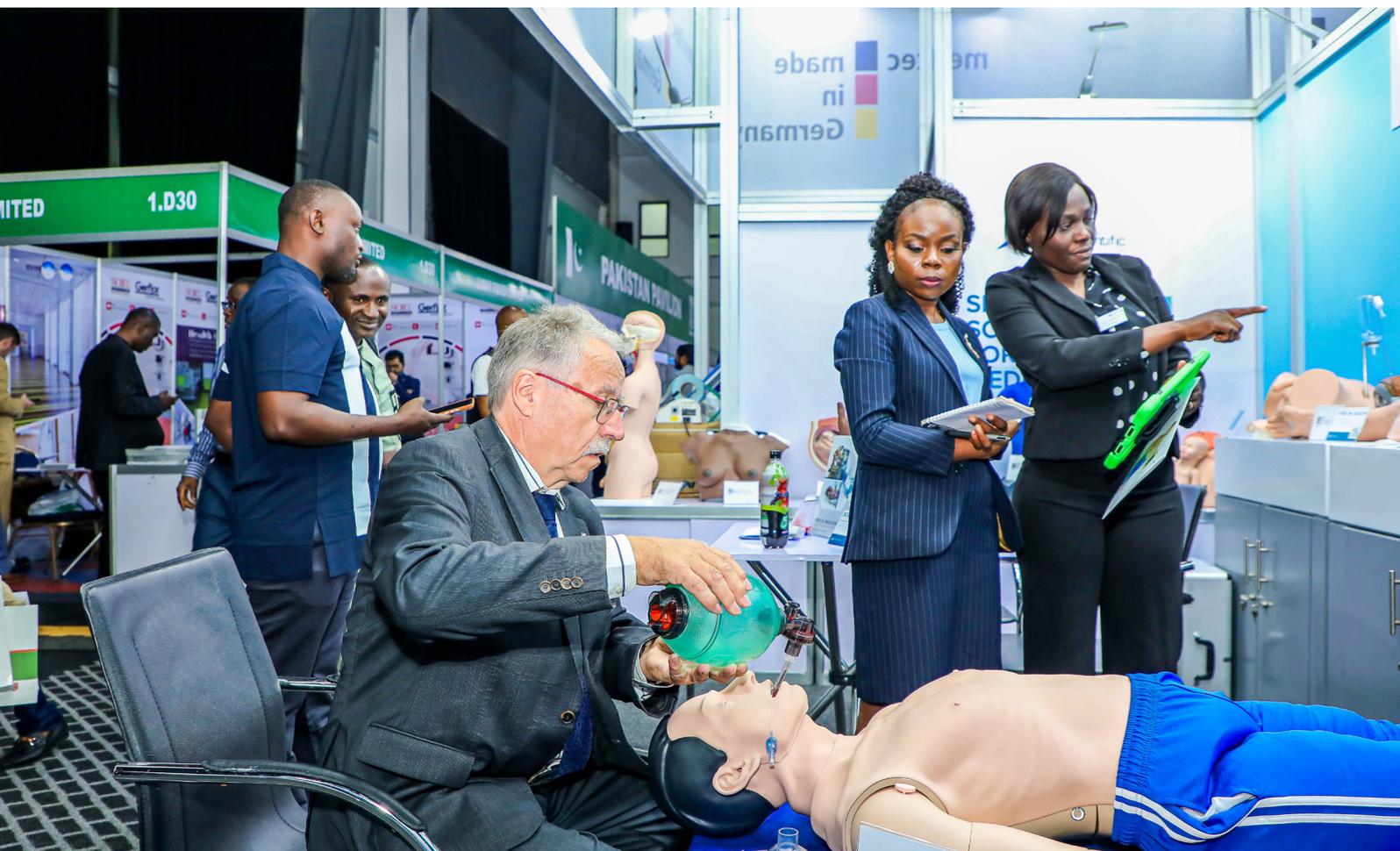
Benin has been aiming to increase access to critical health care, particularly for disadvantaged and marginalized people, in order to attain UHC. The nation has undertaken attempts to enhance health insurance coverage, notably the implementation of the «Assurance pour le Renforcement du Capital Humain» (ARCH)

program, which seeks to give universal health care to all Beninese citizens by 2025.

## Investment

For the third year running, fiscal policy has been expansionary, and the deficit for 2022 is expected to be high at 5.6 % of GDP, down from 5.7 % in 2021, despite the minor narrowing. Starting in 2024, the public deficit will be reduced thanks to the steady rise in tax collections and the expiration of a number of fiscal policies implemented to boost the economy. Public debt increased significantly during the course of three years, from 41.2 % of GDP in 2019 to 52.8 % in 2022, an increase of 11.6 percentage points of GDP, even if the danger of debt distress is still considered to be mild.

The World Bank has granted \$187 million in International Development Association (IDA)\* financing to assist Benin in improving the quality and access to basic health care services, as well as strengthening its public health emergency response capabilities. The Benin Health System Enhancement Program, a Program for Result initiative, will assist enhance the quality and access to primary health care services, with a focus on reproductive, maternal, neonatal, child, and adolescent health, and nutrition. This initiative will serve close to nine million individuals with important health services and more than four million children with basic nutrition services. almost 2.8 million children will be immunized, and competent health staff will attend almost two million births. The initiative will also help Benin improve disease surveillance and respond to public health emergencies more swiftly and efficiently.



# Niger

## Number of healthcare facilities

The WHO Global Health Observatory estimates that as of 2022, the proportion of private vs public healthcare institutions in Niger is as follows:

There were 1,102 public healthcare institutions in Niger, which is around 78 % of the total number of healthcare facilities in the nation. The government owns and runs these facilities, which offer general population healthcare services.

There were 314 private healthcare institutions in Niger, which makes up around 22 % of all healthcare facilities in the nation. Private companies or individuals own and run these clinics, which charge a fee for their medical services.

## Universal Health Coverage

A variety of programs have been developed by the government to increase healthcare access, particularly in rural regions. Mobile clinics, community health worker programs, and the use of telemedicine to give distant consultations are among them.

In order to enhance access to healthcare services, the government has also adopted health finance changes. The implementation of a national health insurance program, which seeks to offer inexpensive healthcare services to all Nigerians, is one such change. The program is now being piloted in different parts of the country, with the government intending to build it up gradually.

Furthermore, the government has worked to promote maternal and child health through increasing access to family planning services and enhancing the quality of maternal and child healthcare services.

## Investment

Niger got US\$180 million in financing from the Global Fund to Fight AIDS, Tuberculosis, and Malaria between 2018 and

2020 to boost its healthcare system. This money was used to expand access to malaria treatment, promote the availability of antiretroviral medicine for HIV patients, and strengthen the country's healthcare supply chain.

As per World Bank, real GDP growth is anticipated to be 6.9 % in 2023, in line with potential, and to rise to 12.5 % in 2024. Niger's government dedicated 10 % of its national budget to the health sector in 2021, signifying a considerable increase in domestic healthcare spending. To facilitate healthcare access, the government has also launched a national health insurance program with a US\$12 million budget.

## Healthcare and trade regulation environment

**Regulation of the Healthcare Sector:** The Ministry of Public Health in Niger is in charge of regulating and overseeing the healthcare industry. It establishes rules, regulations, and requirements for the provision of healthcare and keeps track of compliance. However, regulatory enforcement may not be as strict as it should be, especially in rural regions, and healthcare institutions could find it difficult to uphold quality standards.

**Trade regulations:** Niger has put in place trade rules that control many facets of international commerce, such as tariffs, import/export documentation requirements, and customs processes. The Niger Chamber of Commerce and Industry offers assistance and services to companies involved in international commerce, while the Niger Customs Directorate is in charge of enforcing customs laws.

**Trade Policy:** Niger abides by the regional trade policies and rules set out by the Economic Community of West African States (ECOWAS), of which it is a member. Various regional and global trade agreements, such as the African Continental Free Trade Area (AfCFTA), which aims to increase trade and economic integration throughout Africa, have also been ratified by Niger.



# Cameroon

## Number of healthcare facilities:

According to the World Health Organization's (WHO) Global Health Observatory, the following is the breakdown of healthcare facilities in Cameroon between private and public as of 2022: Public Healthcare institutions: Cameroon has 2,910 public healthcare institutions, accounting for approximately 82% of all healthcare facilities in the nation. The government owns and operates these facilities, which provide healthcare to the general public. Private Healthcare Facilities: Cameroon had 643 private healthcare facilities, accounting for approximately 18% of all healthcare facilities in the nation. Private persons or organizations own and run these facilities.

## Universal Health Coverage

Cameroon has a relatively low level of health insurance coverage, with the majority of the population reliant on out-of-pocket expenditures for healthcare services. The government has begun measures to increase health-care coverage, particularly for vulnerable groups.

## Investment

Cameroon announced its National Health Development Plan (2016-2020) in 2016, with the goal of improving health infrastructure, services, and results throughout the country. The plan's entire budget was XAF 1.6 trillion (about USD 2.7 billion).

The World Bank has also been lending money to Cameroon's health sector. The World Bank, for example, provided a USD 150 million loan to Cameroon in 2020 to enhance its health systems and improve health care delivery. Cameroon also got USD 207.8 million from the Global Fund in 2020 to fund its health programs.

## Healthcare and trade regulation environment

**Import and Export rules:** Cameroon has import and export rules in force, including customs charges, tariffs, and import/export documentation requirements. Certain commodities may necessitate permits or licenses for import or export.

**Trade Policies:** The Central African Economic and Monetary Community (CEMAC) and the Economic Community of Central African States (ECCAS), both of which have established regional trade agreements, include Cameroon as members. Cameroon is governed by rules governing international commerce and is a member of the World Trade Organization (WTO).

In addition, Cameroon has a variety of bilateral and multilateral trade agreements with other nations and areas, such as China, the European Union, and the United States. These agreements may also contain clauses relating to healthcare and pharmaceutical legislation and are intended to boost trade and investment between Cameroon and its trading partners.



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