



DUBAI'S HEALTHCARE ECOSYSTEM HIGHLIGHTS





“The UAE and Dubai have placed a high priority on creating one of the world’s best healthcare sectors, in line with our development vision centred on human wellbeing and happiness. Consistent with our unwavering drive for excellence, we continue to transform the sector by bringing together the globe’s leading healthcare expertise, talent, and institutions and opening new avenues for innovation to flourish.”

His Highness Sheikh Mohammed bin Rashid Al Maktoum
Vice President and Prime Minister of the UAE and Ruler of Dubai

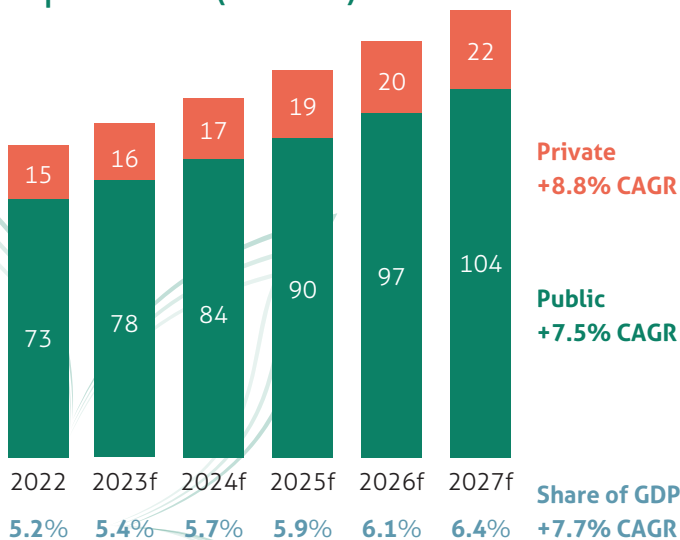
Public health expenditure remains robust in Dubai

The UAE’s healthcare sector has long been considered the most advanced and dynamic in the Middle East because of its robust infrastructure. Combined with clinical research and manufacturing capabilities, the focus has always been on creating a symbiotic ecosystem.

The Dubai Healthcare City (DHCC) free zone, established in 2002, epitomises this vision by bringing together core healthcare services with reputed global and regional organisations, following global best practice, and with regulatory oversight by the Dubai Healthcare City Authority (DHCA). Along with hospitality, consultancies, retail outlets, educational institutions, and medical-grade logistics, DHCC contains a nurturing ecosystem that supports patient care while being conducive for business.

Dubai’s healthcare vision is to cater effectively to the growing population, which is forecast to touch 5.8 million by 2040, from 3.65 million in 2023. The [Dubai 2040 Master Plan](#) envisages increasing the land area allocated to education and health facilities by 25%. The growth in health infrastructure will not only deliver services to residents but also position it perfectly to continue to grow as a regional medical tourism hub for specialty treatments.

Growth forecast for UAE health expenditure (AED bn)



Source: BMI, Fitch Solutions, October 2023



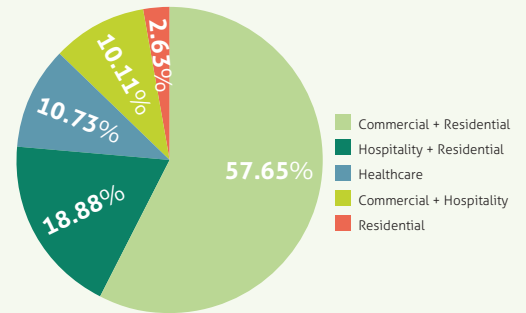
DHCC Phase 2: Complements ecosystem with preventive care, wellness, and urban lifestyle

22m

square feet is the approximate total area of DHCC Phase 2

AED 1.03bn

Total investment into DHCC Phase 2 (2019 to date)



Source: DHCA. Includes only projects that have been completed in Phase 2

5.2%

Contribution of the healthcare sector to Dubai’s GDP in 2022, up from 3.1% in 2012

8%

CAGR of Dubai’s healthcare expenditure over 10 years to 2022

47%

of the AED21.4bn spent on healthcare in Dubai in 2022 was private sector funded

Source: Statista Market Insights, September 2023

4,609

Health facilities
in Dubai until
Q1-2023

143

Health facilities
licensed in
Q1-2023 in Dubai

“We have built an extraordinary community of healthcare operators. Two key developments are in process. With our partners, we can facilitate extension of healthcare services to other communities in Dubai. We plan to partner with other developments so our hospitals can open, say, a community health clinic to extend their outreach and make the patient journey easier. Along with that, within our mature community, we will focus on lifestyle options by creating co-living concepts for doctors, professors, and students, designed for people who work in DHCC.”

Allae Almanini
Chief Financial Officer,
Dubai Healthcare City Authority

Dubai health ecosystem

Offering a wide range of medical services, including advanced diagnostic procedures, specialised treatments, and surgical procedures, medical facilities in Dubai, including those in Dubai Healthcare City, provide care across a range of medical specialities and sub-specialities.

52



Hospitals

77



Specialised
clinics

58



One-day surgery
centres

82



Dental clinics

122



Clinics

1,325



Pharmacies

414



Optics centres

160



Nursing homes

57



Alternative
medicine centres

Source: [Dubai Government data, May 2023](#)

Dubai is a talent magnet for health professionals



6,500

Applications for obtaining a health professional license to practice in Dubai in Q1-2023



56,239

Licensed healthcare professionals in Dubai as of Q1-2023



10-15%

Growth in medical professionals projected in 2023 and beyond

Source: [Dubai Government data, May 2023](#)

As the demand for quality healthcare in Dubai increases, the need for qualified and trained personnel is keeping pace. Recognising the necessity of introducing a sense of residential stability among qualified expatriate healthcare professionals, the government has taken a number of steps, including long-term visas, such as the Golden Visa, and setting up research and academic organisations.

“When it was first introduced, the Golden Visa started with select doctors. It is now expanded to include all doctors. The Golden Visa process has become very systematic and plays an important role in retaining talent and stabilising the ecosystem.”

Allae Almanani
Chief Financial Officer,
Dubai Healthcare City Authority

10,000

Total workforce in 2021



DHCC

11,500

Total workforce in 2024

Fast tracking of verification for DHCC healthcare professionals

DHCA has partnered with the DataFlow Group, a Primary Source Verification (PSV) company, to offer a new platinum service exclusively designed for the DHCC community to assist with and streamline professional licensing. The DHCC community can book a doorstep service that includes collection, upload, payment, process tracking and the delivery of their reports resulting in an expedited and seamless verification process.



~2k

Golden Visa holders in DHCC



DHCC gets into a higher gear



481

Registered facilities



195

Clinical facilities



19

Facilities expanded in 2023



130

Regional HQs of global companies



1st

Russian clinic in Dubai: Kandinsky

Source: Dubai Healthcare City Authority

As Dubai's healthcare and wellness free zone ecosystem, the Dubai Healthcare City (DHCC) contributed AED 2.8 billion to Dubai's GDP in 2021 and supported 15,760 jobs citywide. As demand for quality healthcare increases in the city, DHCC has kicked operations into high gear and continues to transform Dubai's healthcare landscape by establishing and fine-tuning a robust and thriving ecosystem that offers direct access to an unrivalled network of partners.

The success story written by initiatives such as C37, UAE's first private medical workspace,

continues to unfold, as DHCC develops its second phase of expansion, while also spreading its and its partners' service offerings beyond the cluster and across the city in partnership with other future-focused entities.



16%

Estimated CAGR in DHCC turnover, 2020-2024



C37: The emerging health powerhouse



International doctors in C37



- Launched in June 2021, C37 is an innovative, flexible, private medical workspace designed for overseas and UAE-based doctors seeking to establish a part-time, independent practice. These co-working spaces have facilitated service delivery by UAE-based or visiting doctors, supported by a dedicated team to handle the operational processes, visa processing, and licensing.
- In October 2022, DHCC signed an MoU with Canadian Specialist Hospital (CSH), which enabled CSH doctors without private clinics at the hospital to receive patients and provide consultations at C37's medical workspaces. Surgeons registered with C37 can perform their surgeries in the hospital's fully equipped facilities.
- In less than three years since its establishment, C37 has grown exponentially, attracting superior talent from across the world. It not only creates an efficient doctor-patient solution for visiting and resident patients but also provides a platform for networking and collaboration with hospitals and clinics within the DHCC ecosystem.



5,619
Procedures performed



3,003
Registered patients



7,870
Patient visits

Partners power the DHCC ecosystem



Moorfields Eye Hospital Dubai

"Moorfields Eye Hospital Dubai has experienced significant growth in recent years, particularly in 2022 and 2023. The hospital has observed an average of 15% year-on-year increase in patient demand, a primary driver for the hospital's expansion plans. The facility and service offering are set to grow by over 20% to meet the increased demand," says **Elhadi Hassan**, Managing Director, Moorfields Eye Hospital Dubai.

He adds: "DHCC offers a unique and robust healthcare ecosystem that combines advanced infrastructure and a strategic location. This ecosystem allows healthcare providers like Moorfields Dubai to thrive and expand. The strengths of this ecosystem include access to a diverse patient base, state-of-the-art facilities, and a focus on specialised medical fields. Opportunities for further development lie in leveraging technological advancements in healthcare, expanding medical tourism, and enhancing collaborative efforts for research and education."

Royal College of Surgeons in Ireland

"RCSI-Dubai was established at DHCC in 2007 where we provide education, collaborate with healthcare providers to offer training, and engage with the community on social-impact initiatives. Our programmes have graduated over 2,000 professionals who are working across the public and private sector in the UAE. We provide training to a number of healthcare providers in the UAE – including PureHealth, Emirates Health Services, and Johnson & Johnson – to meet their educational and training needs," says **Sara McDonnell**, Executive Director at the RCSI Graduate School of Healthcare Management.

She adds: "The UAE continues to attract the largest number of international students to our postgraduate online programmes. Last year alone, MSc programmes have seen a 20% growth in enrolments. It feels like the DHCC community members have a common pursuit in striving for excellence for the benefit of enhanced patient-centred care. From an educational perspective, there is an opportunity to establish a Medical Education Centre that would focus on the ever-evolving continuing education and professional development needs of the DHCC community members."

Healthcare 4.0: Investment and growth in key sectors and sub-sectors

[Research](#) shows that transformation of the classical hospital model using the platform business model in combination with new digital technologies can support a responsive ecosystem. Under the ecosystem framework for healthcare services, all stakeholders – core health providers (hospitals, pharma manufacturers), complementors (diagnostic labs, pharmacies, startups), homecare providers, software providers, R&D labs, medical schools, wellness centres for alternate medicine, government agencies, and patients come together via digital technologies to emerge as a connected collaborative network.

Medical devices

In the journey towards strengthening infrastructure, the medical equipment sector provides significant business opportunities for international companies.



\$2.45bn

Projected 2024 revenue from the medical devices market in the UAE

Source: [Statista Market Insights, January 2024](#)

Pharmaceuticals

The UAE has a rapidly developing pharmaceuticals market, with local and international companies manufacturing products within the country.



\$1.97bn

Projected 2024 revenue from the pharmaceuticals market in the UAE

Source: [Statista Market Insights, December 2023](#)

Hospitals

Hospitals are an important component of the healthcare infrastructure in Dubai and are part of the national capacity, with the private sector playing a crucial role.

\$9.15bn

Projected 2024 revenue from the hospitals market in the UAE

\$0.95k

Projected per person revenues in 2024



Source: [Statista Market Insights, September 2023](#)



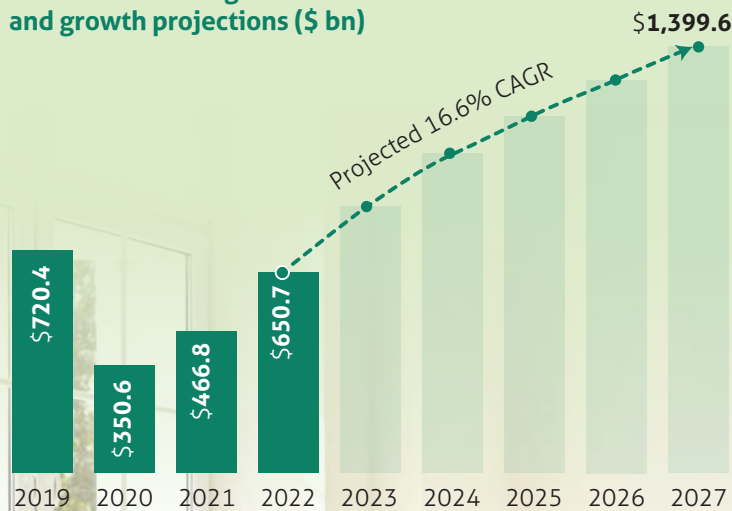
A regional hub for health and wellness tourism

Dubai is a hub for patients seeking medical treatment from across the region, including Asian countries, Africa, Europe, the Commonwealth of Independent States, and the Gulf Cooperation Council (GCC) countries. According to DHA, Dubai saw 674,000 medical tourists spending AED 992 million in 2022, an increase of AED 262 million from 2021. Dubai's strategic location, safety, state-of-the-art infrastructure, and amenities add to the factors that have created a magnet for medical tourists. Also in its favour is the high-quality patient-centric medical care. Specialisations such as dermatology, dentistry, gynaecology, orthopaedics, plastic surgery, ophthalmology, fertility treatments, hospitalisation, and recovery are the most used facilities by health tourists. Wellness tourism is clearly an emerging powerhouse, not only in the Middle East and Africa region but also globally, with the UAE playing a stellar role on the world stage.

Medical visa builds on growth

In January 2024, DHCC initiated the process of taking applications for the newly introduced medical visa in coordination with the General Directorate of Residency and Foreigners Affairs. The process allows treatment centres to apply for the visa on behalf of a patient. The visa has a longer, and extendable, validity of three to six months. The conditions and mechanisms are much more flexible than a tourist visa. This allows treatment centres to offer the facility to registered patients. The activating of the visa with treatment facilities addresses one of the major challenges of attracting international patients.

Wellness tourism global market size and growth projections (\$ bn)



Source: 2023 Global Wellness Economy Monitor

18



The UAE's global rank among wellness tourism destinations

\$5.4bn



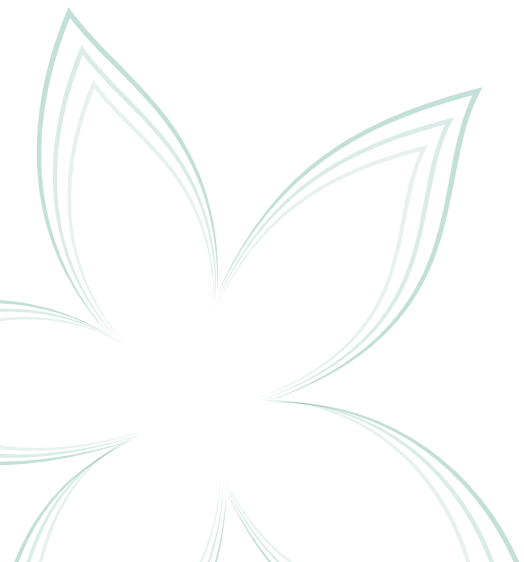
Spent by wellness tourists coming to the UAE in 2022, up from \$2.1bn in 2020

61.2%



The UAE's CAGR in wellness tourism spending between 2020 and 2022





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