

Last Updated: April 2023

Bahrain's Private Healthcare sector covers a wide range of businesses including hospitals, rehabilitation centers, dental clinics and others regulated by the National Health Regulatory Authority (NHRA). The sector's gross value added declined by 10.7% from 2021 to 2022, however Bahrain's private healthcare is predicted to bounce back with the opening a number of hospitals and care centers.



## Sector Opportunities & Trends

### 01. Telemedicine and virtual care

In 2020, Bahrain issued its first telemedicine license and guidelines to enable virtual consultations to take place through licensed medical practitioners in the Kingdom. Telemedicine and virtual care are likely to increase due to patient expectations and the rise of new delivery models. Bahrain's virtual care sector will get a boost when the process of including the country in the network of Saudi Arabia's SEHA Virtual Hospital, the first in the Middle East, is complete. The cooperation will strengthen healthcare between the two countries in many related fields, such as health insurance, medical research, emerging diseases and knowledge exchange.

### 02. Geriatric care

With a rising aging population, the demand for geriatric services is expected to grow. Although the geriatrics care industry is at a nascent stage in Bahrain and the GCC, it is expected to develop as a non-medical specialty in the coming years in line with global trends.

### 03. Mental healthcare

The NHRA in 2020 introduced a governing framework aimed at institutionalizing the treatment and delivery of mental care in Bahrain, effectively extending a hand of support to mental health patients. There is a need for rehabilitation centers to provide a safe, supportive environment for people to recover from addiction and other mental health issues such as anxiety and post-trauma stress.

### 04. Preventive healthcare

Preventive care aims to nip illnesses in the bud and keep more people healthy by promoting health and wellness measures such as regular checkups and screenings as well as push for healthy lifestyle changes such as exercising and healthy eating.

### 05. Public-Private Partnership

Public-private partnerships could improve the delivery of healthcare services and reduce wait times for medical treatments offered by public hospitals. In turn, private hospitals can benefit commercially from public hospital referrals.

### 06. Long-term care facilities

Introducing long-term care facilities for patients will help ease hospital bed occupancy rates. There is also a need for rehabilitation centers to provide a safe, supportive environment for people to recover from injuries, addictions and other mental health issues.

### 07. Medical tourism

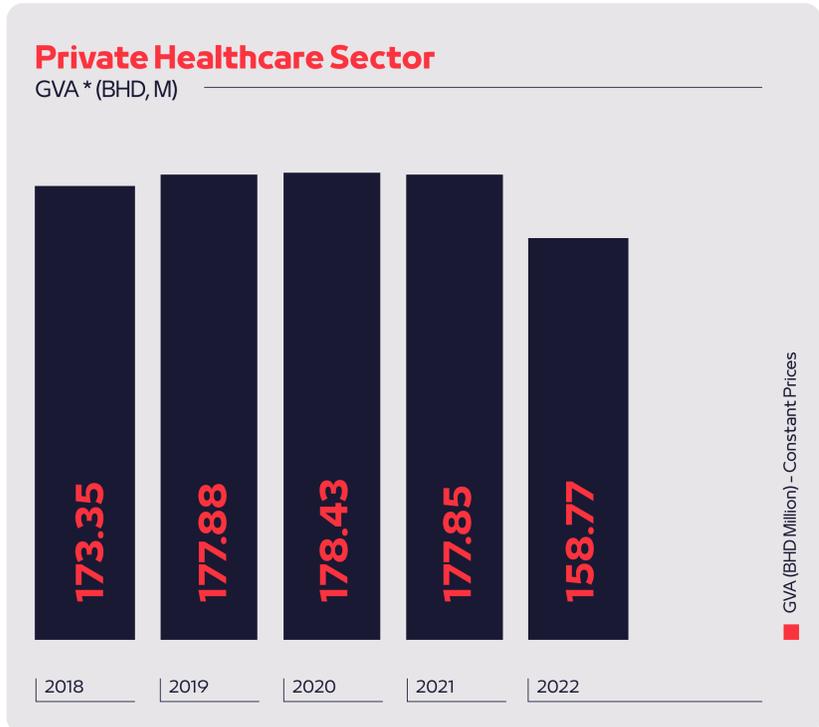
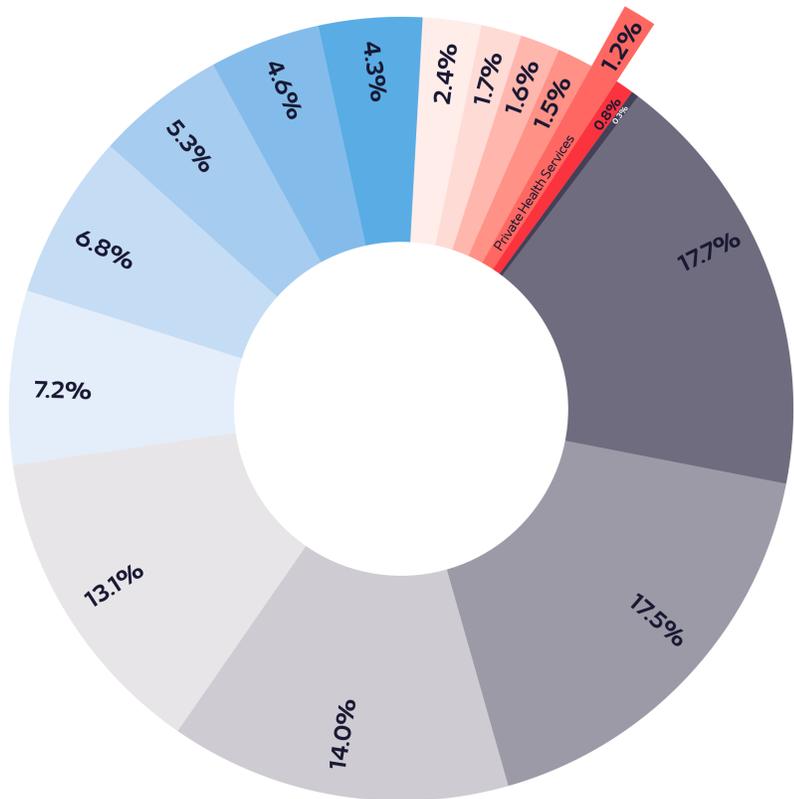
Medical and wellbeing tourism is one of the pillars of the government's economic recovery plan. Bahrain has the potential to attract medical tourists from neighboring countries, especially for IVF, cosmetic and substance abuse treatments.

# Private Healthcare Sector Economic Indicators

## iGA-National Accounts, Q4-2022

### Private Healthcare Sector Contribution to Real GDP

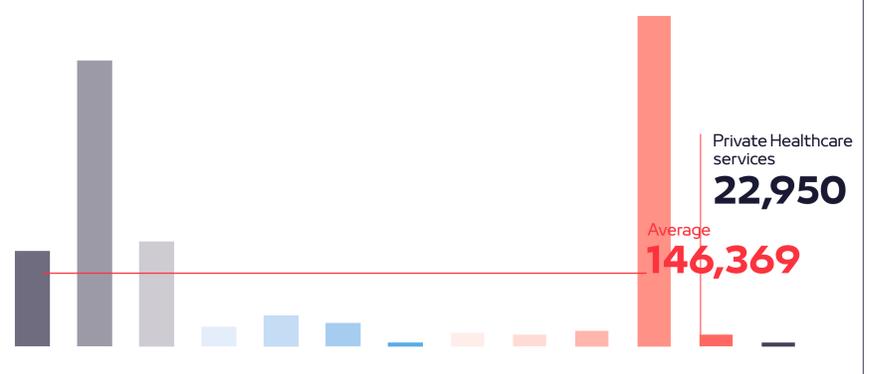
(%, Q4 2022)



Mining & Quarrying	17.7%	Tax on Products	4.3%
Financial Corporations	17.5%	Private Education Services	2.4%
Manufacturing	14.0%	Hotels & Restaurants	1.7%
Government Services	13.1%	Other Social & Personal Services	1.6%
Construction	7.2%	Electricity & Water	1.5%
Transport and Communication	6.8%	Private Health Services	1.2%
Real Estate & Business Activities	5.3%	Others**	0.8%
Trade	4.6%	Agriculture & Fishing	0.3%

### GVA per company

(BHD, Q4 2022)



\*Gross Value added (GVA) measures the value of goods and services produced in an area, industry or sector of an economy  
 \*\*Others includes (Private Non-Profit Institutions, Households with Employed Persons)

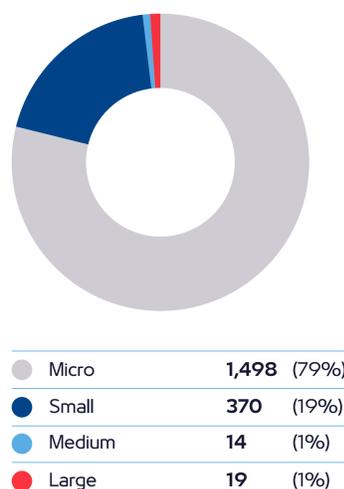
### Private Healthcare Sector Enterprises

LMRA, 2022 - BLMI

**1,901**  
Active CRs

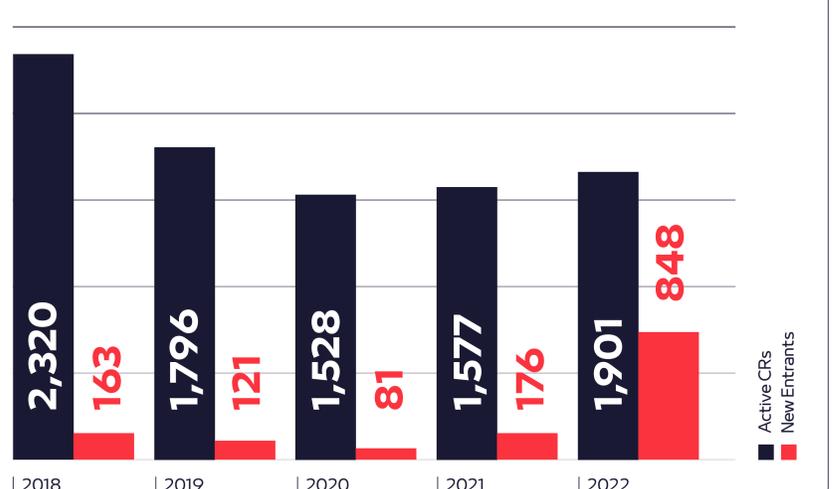
**2.6%**  
of total Active CRs in Bahrain

### Private Healthcare Sector by Enterprise Size (%), Q4 2021



### Private Healthcare Sector

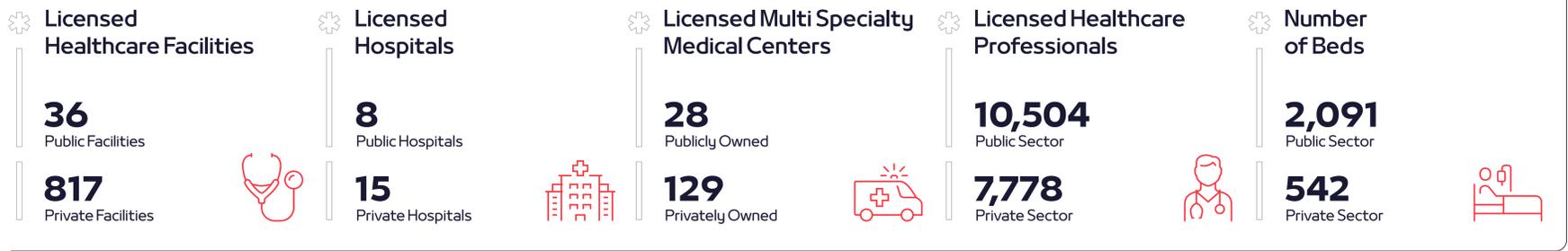
Active Commercial Registrations (2018 - 2022)



As per ISIC4 classification, the sector includes hospital activities, medical and dental practice activities, residential care activities, social work activities without accommodation.

### Healthcare Facilities

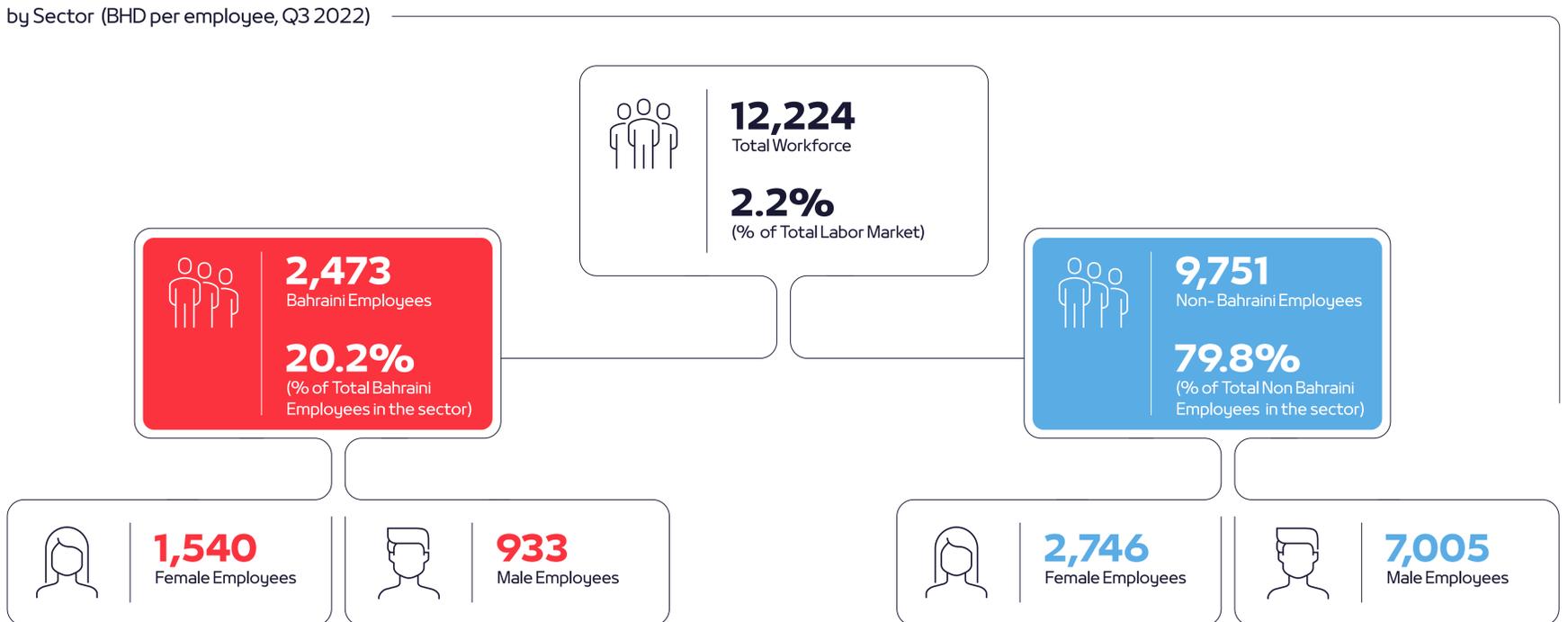
NHRA, 2022



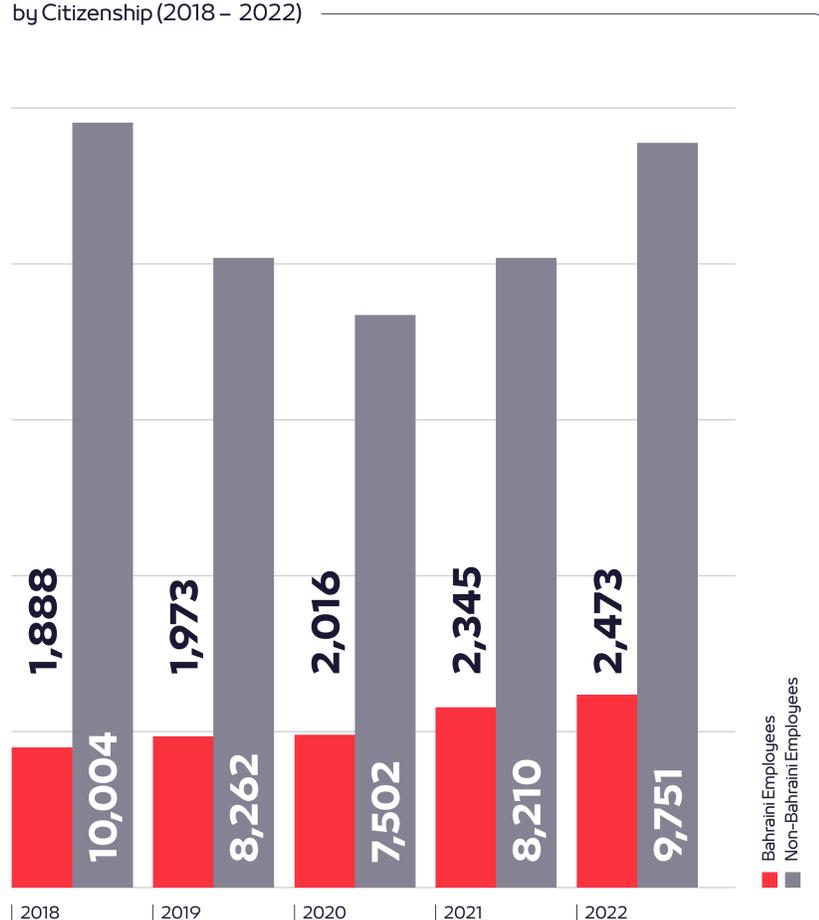
### Private Healthcare Sector Employment

LMRA, Q4 2022- BLMI / iGA-National Accounts

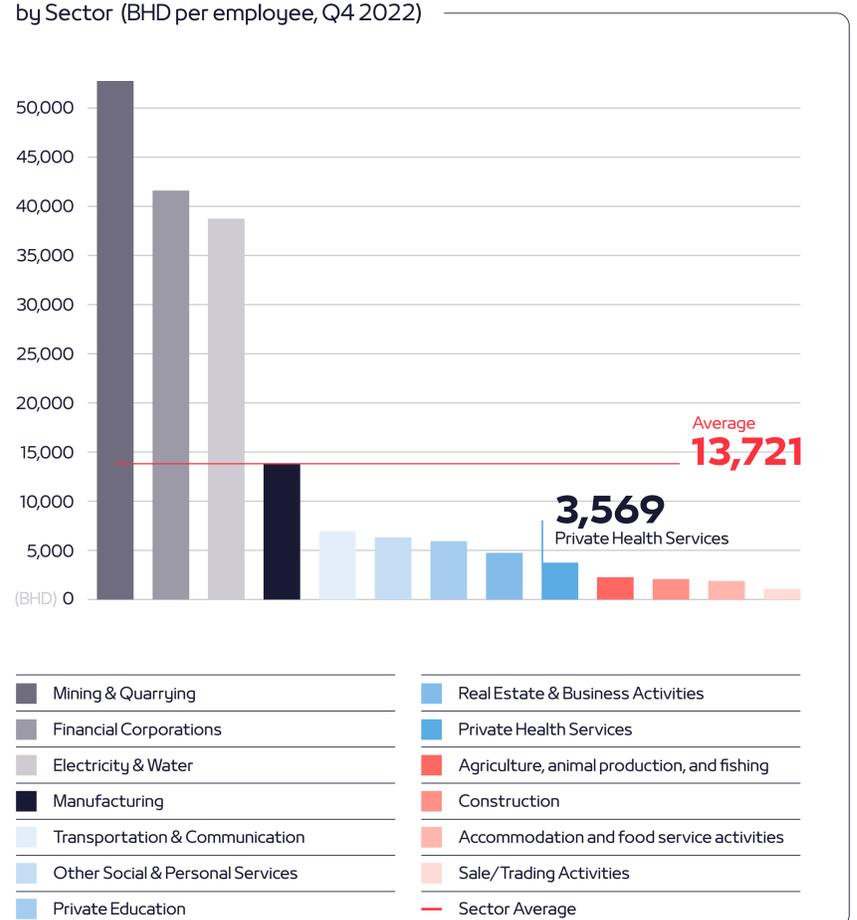
#### Private Healthcare Sector by Sector (BHD per employee, Q3 2022)



#### Private Healthcare Sector Growth in Employees by Citizenship (2018 - 2022)



#### Private Healthcare Sector Labor Productivity by Sector (BHD per employee, Q4 2022)



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