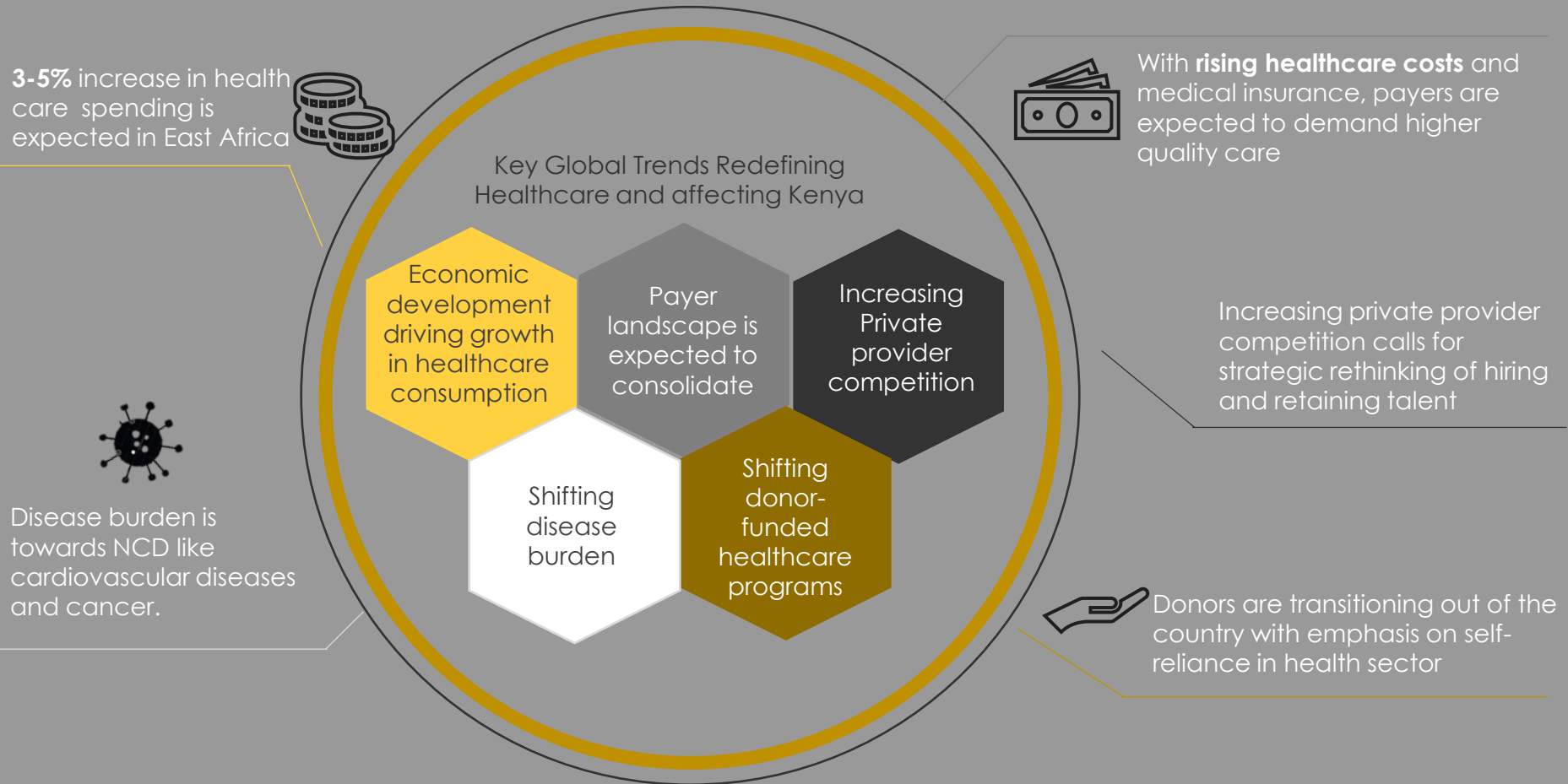


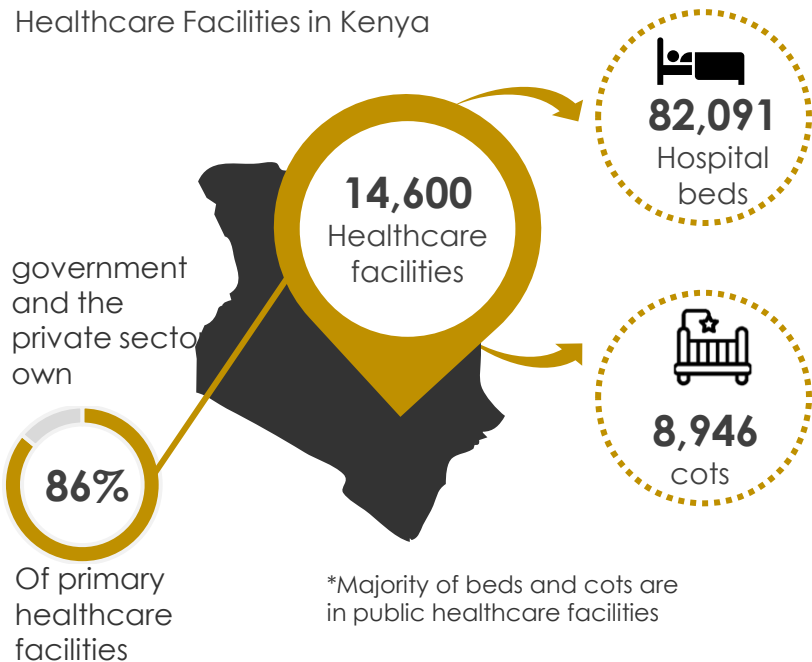
# Key Global Trends Redefining Healthcare



# Kenya Healthcare Market Summary



## Healthcare Facilities in Kenya



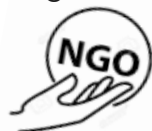
**43%** Of facilities are owned by the Ministry of Health



**45%** Private Owned

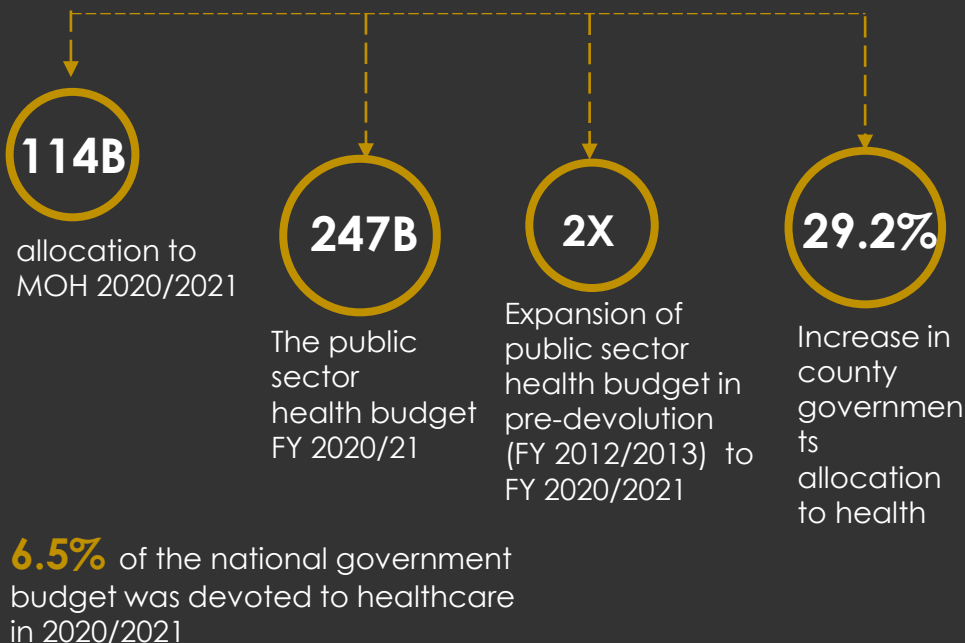


**8%** Faith Based Organisation



**3%** by NGOs

## Investing in healthcare in Kenya



## Limited healthcare professionals in Kenya



**63,580** Registered nurses 2020

**130.6** per 100,000 population



**12,792** Registered doctors 2020

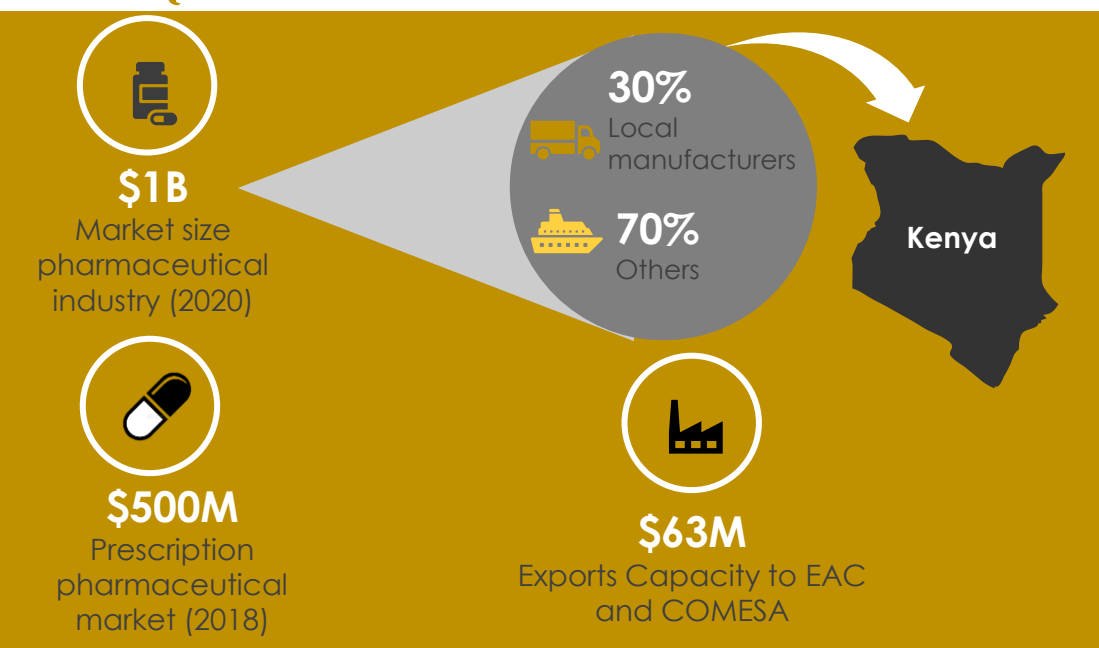
**26** per 100,000 population

Number of nurses and doctors per 100,000 population is below WHO recommendations

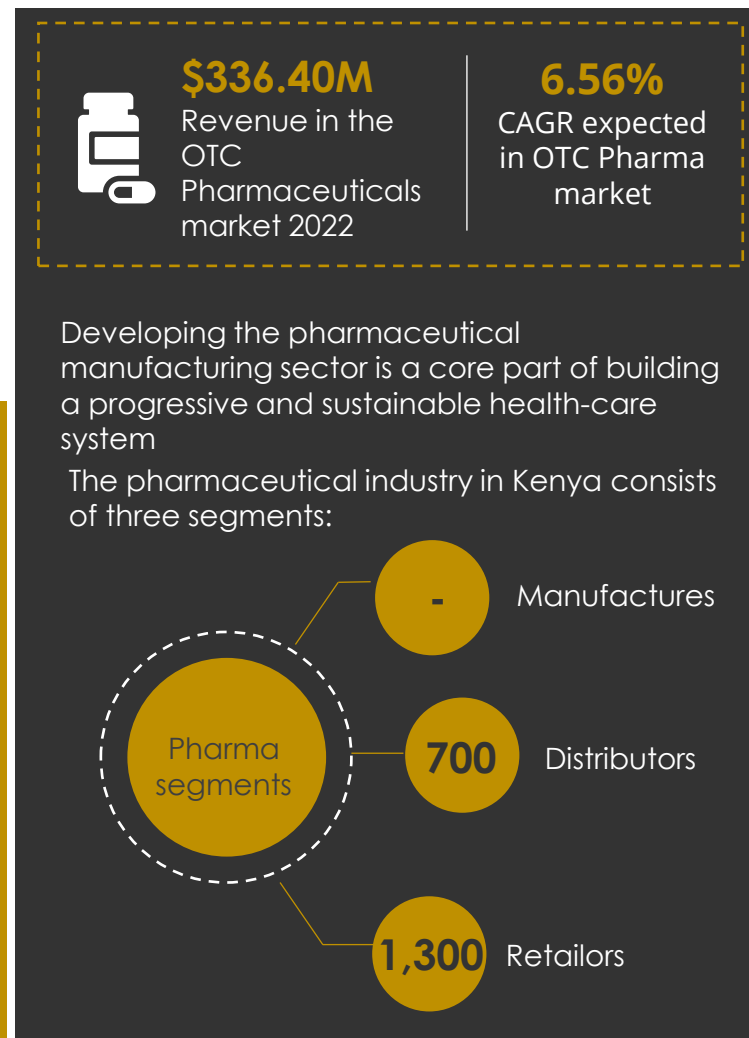
# Pharmaceutical market - Overview



Kenya's pharmaceutical market is expected to grow



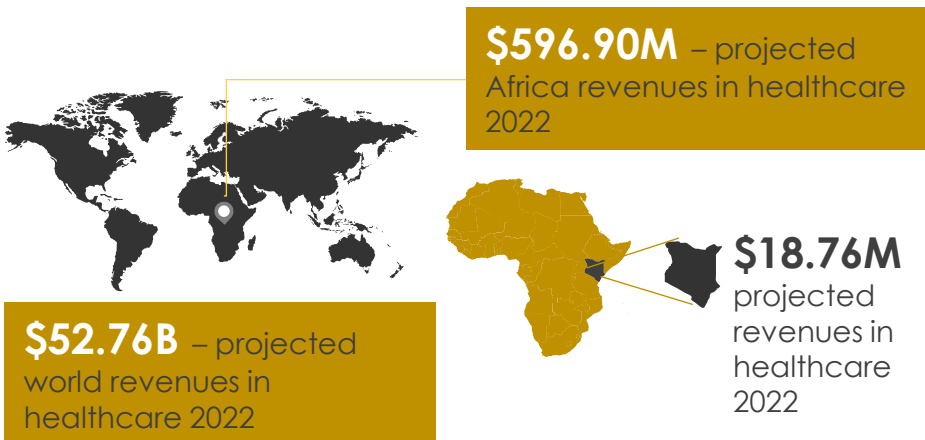
Sources: IFC



# Primary Healthcare - Overview



The growing healthcare market



Source: [Statista](#)

**6.2%** - ratio of government expenditure on health to total government expenditure

Source: [KNBS](#)

**34.5%** rise from previous year

**60.8B** spent on recurrent expenditure with **44%** going to hospital services

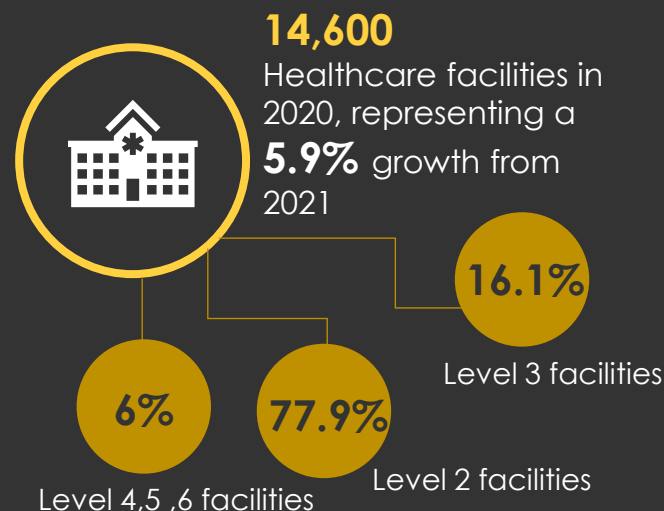
**Ksh 103.1B**

Expenditure on health by government 2019/2020

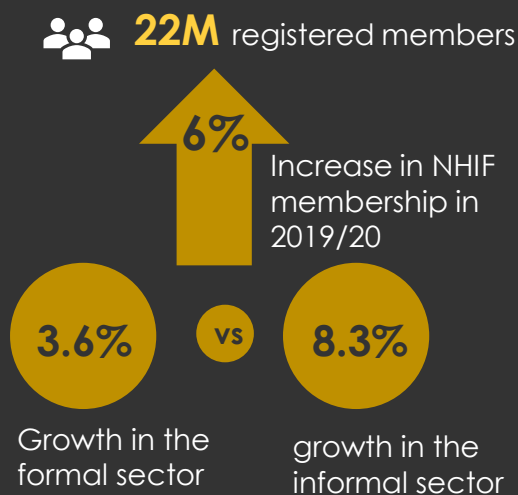
**16.2%** rise expected in 2020/2021

**41%** spent on development expenditure

Kenyan PHC Highlights



NHIF Highlights



Source: [KNBS](#)

**59.5B** member contributions, a **5.7%** increase from the previous years

vs

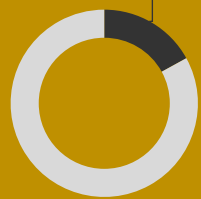
**54.4B** benefits paid out, a **1.8%** increase from previous year

**91.4%** NHIF payout to receipt ratio 2021/2020

# Diagnostics Market in Kenya



**56%** - mean availability of diagnostic tests in health facilities in Kenya



Only **17%** of healthcare facilities have all diagnostic items

**41%**

Mean availability of high level diagnostic equipment

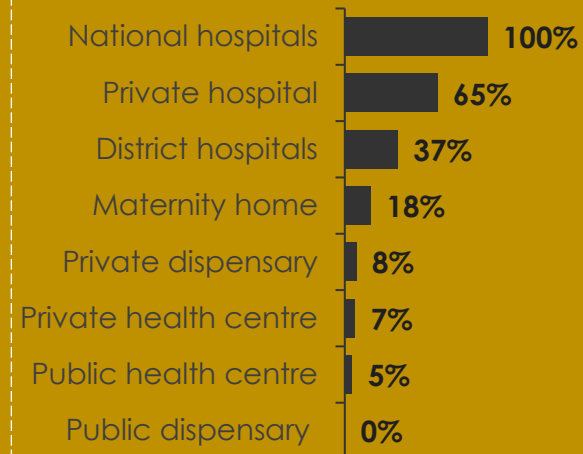


CT Scans are the least available diagnostic equipment at **13%**



Ultrasound are the most available diagnostic equipment at **62%**

## Availability of Diagnostics Services



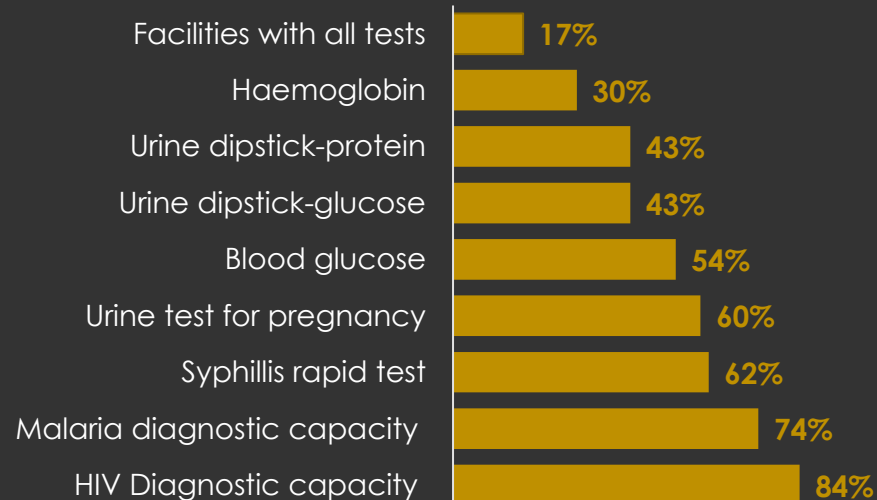
## Diagnostic Capacity

Hospitals have highest diagnostic capacity for **HIV (84%)** and **Malaria (74%)**



Health facilities are least likely to have diagnostics for **hemoglobin (30%)**.

## Diagnostic capacity of facilities



Source: KHHFA 2018/2019

# Problems of Healthcare in Kenya



Kenya's health sector remains challenged in several areas

## 1. Drug availability and affordability



Drug availability remains low in Kenya with average availability of essential medicines in public health facilities at **44%**

## 2. Low incentive for R&D



This is evidenced by decreased launch in new drugs in the country

## 4. Reliance on global supply chain



Undermining emergency response.

## 3. Low capacity and Skill gap



Kenya's has low numbers of medical professionals to serve the populations. Only **26.3** doctors per 100,000 population.

## 5. Reliance on imports



With limited local production. Kenya imports of pharmaceutical products was **\$776.76M** during 2021.

## Bettering the health sector in Kenya

1

Design policies to incentivize and support manufacturers



achieving WHO prequalification or quality assurance compliance.

2

Increasing resourcing



to innovation and research in healthcare

3

Eliminate unregistered retail pharmacies



in the country to minimize the risk of substandard products entering the supply chain.

4

Implementation of public-private partnership initiatives



for creation of sustainable models for healthcare financing

# MoH Strategy and Goals



To work towards a healthier Kenya, the Ministry of Health (MOH) needs to take a life-course approach to drive population health. MoH will have to redouble efforts to promote overall healthier living, while taking targeted health measures for specific segments of society

## 5. Health Financing

- Change basis of funding; move from workload based to capitation model.
- facilities will get a pre-determined fee for every resident living in the region that they are looking after.



## 1. Care Packages

- Develop primary care packages addressing key preventive care actions
- Make health screenings affordable
- Better NHIF Coverage

## 2. Support structures and policies

- Structures supporting healthcare reforms
  - Investing in manpower and training
  - Review financing schemes
  - Build on technology and data

## 3. Mental health support

- Raise mental health awareness among youth
- Provide basic emotional support and screening
- Improve access to addiction services

## 4. Child and Maternal Health

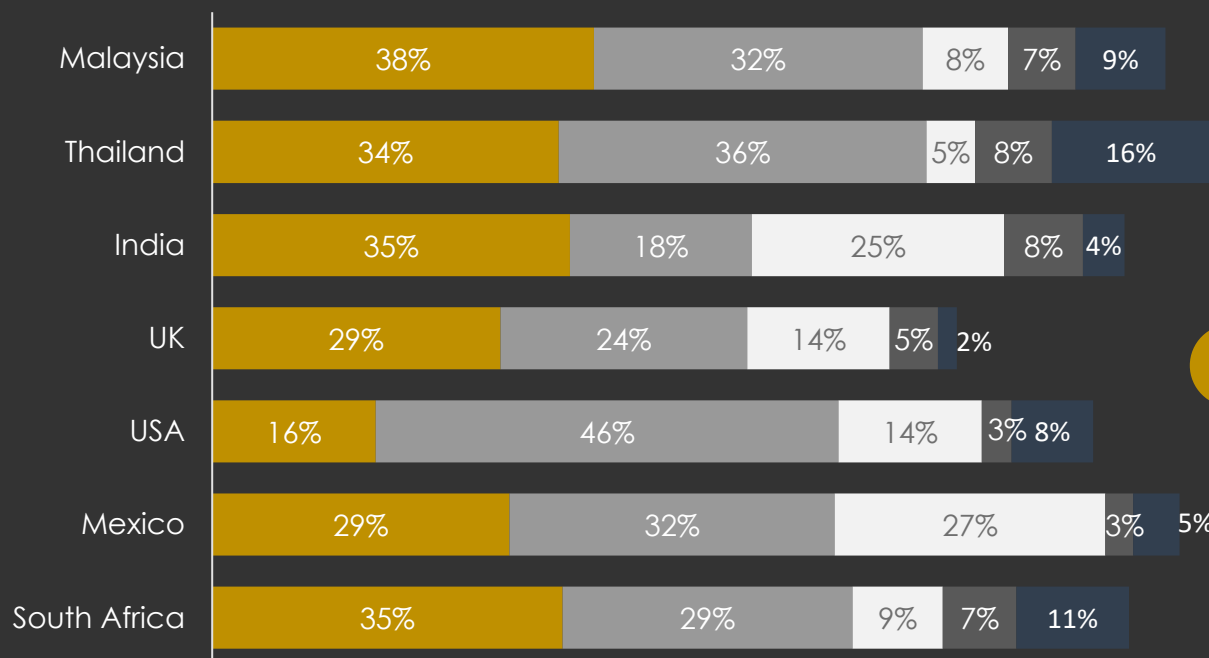
- Provide holistic and comprehensive maternal care
- Post natal depression screening and breastfeeding support to mothers
- Childhood development screening

# Current Healthcare expenditure by function

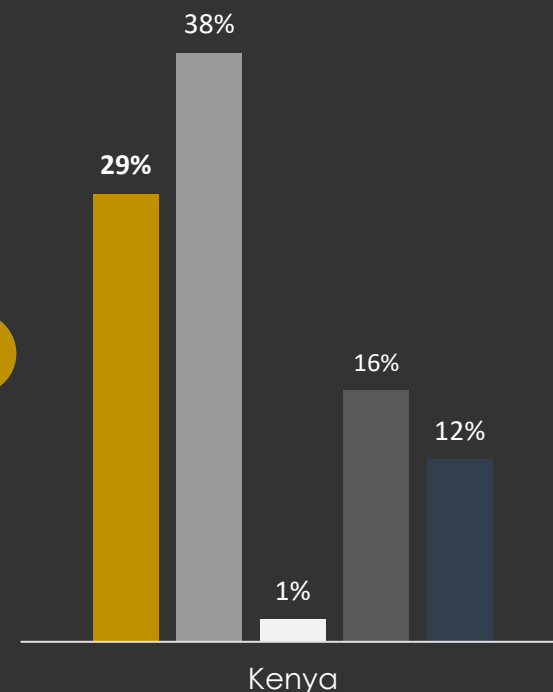


Kenya vs the rest of the world (2019)

Only **1%** of healthcare expenditure is taken up by medical goods



vs



- Inpatient curative care
- Outpatient curative care
- Medical goods (non-specified by function)
- Preventive care
- Governance, and health system and financing administration

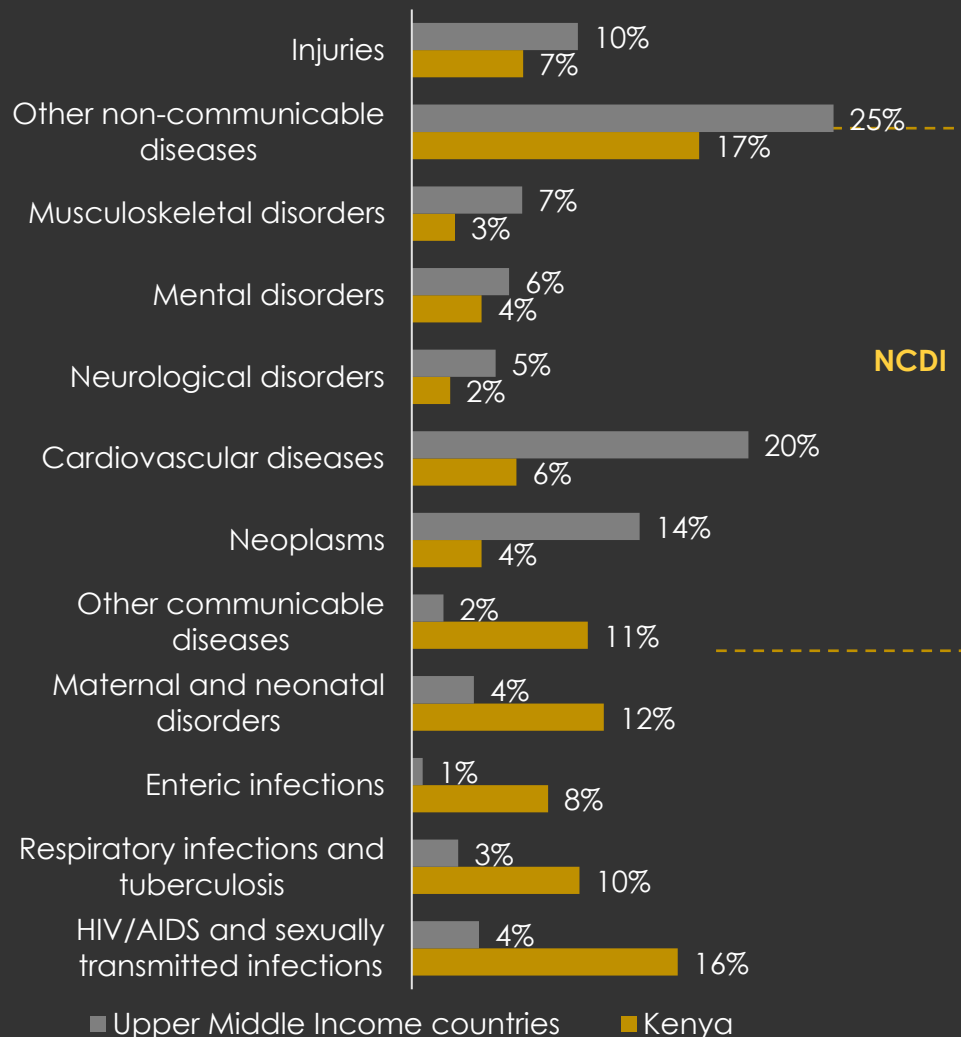
**38%** of current healthcare expenditure is taken up by outpatient curative care



# The share of NCD burden in Kenya

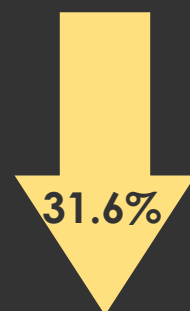


Kenya vs Upper middle class countries



NCDs accounted for **37%** of the disease burden in DALYs in Kenya IN 2019.

HIV/AIDS and STI were the most frequent cause of casualties in Kenya as of 2019, with a rate of almost **104** deaths per 100,000



Reduction in morbidity rate in Kenya in 2020 with **60M** cases of diseases reported



**53.4%** of reported deaths occurred in health facilities



**56.6%** of total deaths

vs

**43.4%** of total deaths

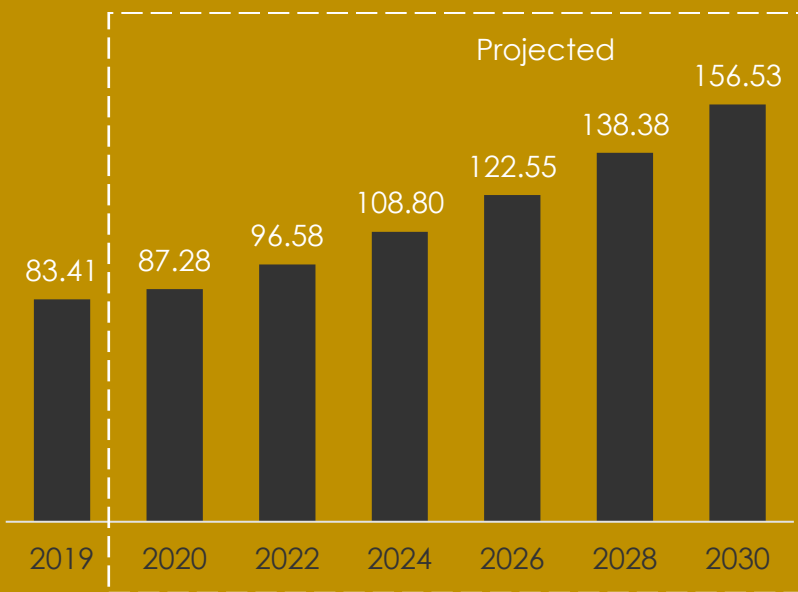


# Current Healthcare expenditure



Projected current healthcare in Kenya

Source: [Knoema](#)



Current healthcare expenditure expected to reach **\$156.53M** in 2030. 

## Healthcare Expenditure breakdown

**4.6%**

Total Healthcare expenditure as a share of GDP

**9.9 %**

Social health insurance as a share of current health expenditure

**\$83**

Kenya's per capita healthcare spending was in 2019

vs

**\$37**

Government expenditure on health per capita

**8.3 %**

General government expenditure on health as a share of general government expenditure:

**46 %**

General government expenditure on health as a share of current health expenditure: