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Roadmap to Sustainable Healthcare

South Africa 2023

An Agenda for Africa



António Guterres, UN Secretary-General, encapsulates Africa's essence: *"Africa's dynamism is unstoppable; its potential is breathtaking."* Africa is poised to redefine its global economic stance, emerging as the second-fastest growing region after Asia in 2023-24, propelled by a forecasted GDP growth rebound to 4.3% in 2024, from 3.8% in 2022, as per the AfDB's African Economic Outlook.

Africa's potential is gradually overshadowing its business challenges. 2023 is marked as the year of the African Continental Free Trade Area (AfCFTA) by the African Union. This pivotal initiative underscores Africa's strategic agenda to attract private investment and foster emerging economies that resonate with a global economic significance.

How does this reflect on the healthcare scene?



In our conversation with **Ken Osei**, Principal Investment Officer at IFC, Ken alludes to key African countries with significant healthcare investments, such as Morocco, Egypt, Cote d'Ivoire, South Africa, Ghana, Kenya, Senegal, and Ni-

geria, "Our focus is on supporting diagnostics availability, achieved by investing in and supporting pathology, imaging, and radiology companies. Additionally, we are supporting primary healthcare delivery, empowering local clinics and hospitals to provide essential treatments post-diagnosis." He believes that localizing and regionalizing pharmaceutical and vaccine manufacturing can increase self-reliance and access to treatment. Increased investment and support for oncology, dialysis, and non-communicable diseases will improve healthcare outcomes.

He also added "Manufacturing plays a significant role, and active pharmaceutical ingredients (APIs) are essential for pharmaceutical production, and having a robust infrastructure with proper equipment, facilities, and chemicals is necessary. Initiatives in Senegal and Rwanda emphasize the continent's commitment to expanding biopharmaceutical manufacturing. In South Africa, we actively support Biovac, a vaccine manufacturer chosen as the mRNA hub, in collaboration with a consortium of direct foreign investors. We also support Aspen Pharmacare, one of Africa's leading pharmaceutical manufacturers, which served as a contract manufacturer for the Johnson & Johnson COVID-19 vaccine. This effort is geared towards bolstering self-sufficiency in vaccine production."

To access the full conversations with the executives please scan the QR code:





ZOOMING INTO THE HEALTHCARE OPPORTUNITY

Improving access to healthcare plays a fundamental role in uplifting communities and has long-term economic benefits for societies. There is a direct relation between improving healthcare and economic prosperity, and we discussed with regional executives their view on how a healthy population translates into a healthier GDP and those opportunities ahead.



Patrick van der Loo, Regional President of Middle East, Russia, and Africa (MERA) at Pfizer, affirms Pfizer is working "on the sustainability of the business, best external relationships, and talent development." Pfizer emphasizes the need for frameworks that align governments' and private players' manufacturing and purchasing plans to attract investment. Patrick Van der Loo notes, "Out of the approximately 50 countries eligible for our initiatives worldwide, around 30 are located in Africa," and adds, "access to the public healthcare system extends beyond the mere availability of a product. While it's possible to introduce a high-end oncology treatment to a country, its effectiveness would be compromised if it lacks the necessary support mechanisms. The product's value diminishes if there are no provisions for breast cancer screening or a shortage of advanced diagnostic capabilities." He also believes in encouraging domestic manufacturing. "Before the pandemic, only 1% of Africa's total vaccine consumption was produced within the continent. However, our collective aim is to establish a framework wherein 60% of vaccines will be manufactured in Africa by 2040," he concludes.



For **Rodrigo Rodriguez, Area Head, UMEA (Ukraine, Middle East, and Africa) at Takeda**, there has been a general change in Africa's overall de-

mographics of diseases. "Over the last 20 years, a huge focus has been on typical diseases such as HIV and tuberculosis. With the evolving demographics of the continent and the overall improvement of conditions, we have observed a huge increase in more complex and rare conditions." His solution is to work closely with the different stakeholders "to support awareness, diagnosis, and knowledge initiatives on how to identify patients, elevate the standard of care, and provide better treatment beyond the medicines to support these patients."



According to **Maturin Tchoumi, Pharma International Area Head Africa at Roche**, "We use the same strategy in all African countries; Roche enters each market as a partner. We collaborate on the patients journey and find pain points we can fix together, creating patient value. We work on improving access through private-public partnership framework to strengthen the system and help with prevention diagnosis and timely treatment." In Kenya, with the program "EMPOWER," they created a network of community leaders to increase awareness about breast cancer, helping primary healthcare points do mammograms for the early diagnosis of breast cancer. "Our significant scale enables us to form strategic partnerships, fostering innovation in Nigeria. In Cote d'Ivoire, we are working with the government to set a budget to treat their breast cancer patients with unrestricted access to our treatments."



"Africa is brimming with opportunities," claims **Mohamed Nasser, General Manager Middle East and Africa (MEA) at Amgen**, "and building upon the experiences of other regions will yield a huge positive impact. Over the past decade, we have established a direct presence in South Africa, striving to reach as many patients as possible within its healthcare system, encompassing private and public insurance. To expand into more African markets, we sought a partnership with Aspen because it boasts a strong presence in South Africa, successfully serves both private and public sectors, and its reach extends to sub-Saharan Africa. Aspen upholds the highest compliance and ethical standards, aligning with our unwavering commitment to doing the right thing."



Karim Bendhaou, Head of Afri-

ca Bureau, Merck Group, "We meticulously analyzed Africa's healthcare landscape of 2003-2004 and made a comprehensive assessment encompassing prevalent health challenges, demographics, infrastructure, regulatory environment, and existing healthcare providers. It laid the foundation for our future endeavors. 2010, we embarked on our Africa strategy; during the rollout phase from 2010 to 2018, we established more than 12 African affiliates, starting with South Africa. This expansion journey took us to Tunisia, Algeria, Morocco, Côte d'Ivoire, Accra, Lagos, Nairobi, Addis Ababa, Rwanda, and other locations. It was a remarkable experience, rich in culture and diverse learning opportunities." **Bendhaou** recognizes the potential of the continent's opportunities and the importance of engaging with stakeholders to foster a sustainable healthcare system in Africa. Identifying key players such as government agencies, local

If you were to create a new start-up in the healthcare sector in Africa, what would it be?



A reflection from Zwelethu Bashman, Managing Director, MSD SA & SSA | South Africa President, IPASA

"I would look into a company that focuses on managing and building efficiencies in healthcare ecosystems. This is something that the African continent needs to prioritize. We must develop healthcare ecosystems that decentralize healthcare and bring it closer to the communities in which people live. This would encourage early healthcare-seeking behavior. We are part of a global initiative called Investing in Innovation (I3) which is a pan-African support initiative for African health supply chain start-ups, funded by the Bill & Melinda Gates Foundation and sponsored by MSD, the WHO Regional Office for Africa, and AmerisourceBergen. The initiative aims to support African-led innovations in health."



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communities, NGOs, healthcare professionals, and influential organizations (WHO, WTO) was a crucial focus. *“Collaborations with ministries beyond health, such as finance, are crucial for effective policy implementation.”*



Ronald Boueri, Regional Managing Director, Olympus MEA Markets, shares, “When considering the African landscape, Olympus continues to focus on high-impact diseases, elevating the standard of care, and as a clear leader in gastroenterology, urology and respiratory care, it has built a presence in growth markets that offer significant, long-term potential. Advancing disease management is a top priority, as is the significance of professional education and training across Africa, crucial to our mission as a global medtech leader.” South Africa’s regulator, SAHPRA, plays a role in enabling a healthy ecosystem: *“Our priority is to support and enable local manufacturers to go beyond vaccines to the local manufacturing of pharmaceuticals and medical devices across the continent.”*



“As regulators, we must consider our role in enabling this continental ambition and intention. We also need to reevaluate our regulatory processes to ensure we don’t become a barrier,” says **Boitumelo Semete-Makokotlela, CEO at South African Health Products Regulatory Authority.**

Another example of Africa’s strategic role in the corporate map is Pierre Fabre. The French company has been active in the continent for more than 45 years particularly in Southern, Western and Northern Africa and is looking for partners to expand to the Eastern part. Africa was the first continent in which the company established itself after Europe and **Pierre Behnam, its Regional Director for Africa, Middle East, Turkey** shares that *“45% of our pharmaceutical drugs are manufactured in Africa either in our own factory or through local manufacturing partners in different countries. In line with our global strategy our focus is on strengthening our medical expertise and building our presence in oncology.”*



SOUTH AFRICA’S ROADMAP TO SUSTAINABLE HEALTH

According to Cas Coovadia of BUSA, “Two aspects must be considered when attracting investments: investment in health goods and services and the impact of health regulation on attracting investment. Building an integrated healthcare system and addressing the massive access inequality is critical. To make the healthcare space attractive to investors, we must preserve access to quality healthcare services and demonstrate progress.” As a country with a significant health burden, attracting new investors into the sector is crucial to growing domestic and export industrial opportunities. Bridging the trade deficit in pharmaceuticals, medical devices, and diagnostics requires better alignment between health policy, its interpretation, and the overall economic growth objectives of the country.



Investing in innovation is crucial for South Africa to achieve a vertically integrated economy that maximizes job creation, GDP contribution, foreign investment, intellectual property creation, innovation, and developing a highly skilled workforce and optimal multipliers for socioeconomic development.

Reflecting on the recent years’ exponential growth, **Afrigen’s Chief Executive Officer, Petro Terblanche**, shares, *“Localizing procurement is critical; the model of investing one rand in local manufacturing in the pharmaceutical sector in 2010 could have yielded 13 South African rands back into the economy, making it a worthwhile investment. Working with GAVI, UNICEF, Wellcome Trust, and the Gates Foundation, we hope the commitments made to changing procurement rules -to procure*



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locally for the continent- will be fully implemented. The true value of our company is in the jobs we can create and the sustainable impact we can make in our country. Building our ability to design and develop vaccines, take them through clinical trials, and manufacture them enables us to hire and transfer our technology and expertise to diverse local stakeholders. My dream for Afrigen is to continue building and developing innovative platforms and products that meet the continent's healthcare needs as we move forward. Our focus on sustainability drives our ambition to play a role in producing 60% of the vaccines required by Africa by 2040, with a particular emphasis on combating neglected diseases such as TB, HIV, leprosy, and malaria."

What do you think 2023 holds for the healthcare scene in South Africa?



Dr. Iain Barton – Founding Principal, Health 4 Development, South Africa: "We are witnessing a major shape-shifting phenomenon driven by rapid growth and multiple initiatives aimed at providing low-cost coverage. This shift is being spearheaded by industry giants such as Dis-Chem, Discovery, Mediclinic, and Intercare. The biggest trend we are seeing now is the need to offer a product for primary care services that encourage pre-funding and pre-saving, whether as individuals or employers, and we must do so."

What is the role of local players in building reliable and sustainable capabilities?



Stavros Nicolaou, Group Senior Executive, Strategic Trade Development, Aspen Pharma Group South Africa

"Africa's biggest lesson was that the only way to manage public health emergencies is by establishing its own pharmaceutical capacities and capabilities. This will allow not only to save lives, but equally to preserve economies. By way of example, Aspen, as the world's largest supplier of general anaesthetics outside of the USA and a leading producer of injectable anticoagulants was a reliable global supplier for Covid-19 patients. Later, we became the first company in Africa and in the Southern Hemisphere to produce - under contract- the J&J Covid-19 vaccine (230 million doses in 12 months). Today, as we look into the future, Africa is dealing with a Pandemic called NCD – Non-Communicable Diseases. This includes diabetes, cancer, cardiovascular diseases and others – all of which significantly afflict Africans and will be crippling to both healthcare systems and economies if left unchallenged. It is for this reason that Aspen, through its significant investment in sterile capabilities and capacities is now poised to produce not only vaccines, together with the Serum Institute of India which takes Aspen into the space of much needed paediatric routine vaccines for the continent, but equally positions us to assist in NCDs. This is demonstrated by another recent announcement where Aspen will be producing human insulin under contract for Novo Nordisk, for African and other patients."



Conversation with David Pritchard, Head of Market Access Healthcare for Sub-Saharan Africa at DP World



Could you provide insights into the operational differences and growth trends among African countries such as Kenya, Nigeria, Namibia, and South Africa?

The African continent faces a significant disease burden, with a notable rise in non-infectious diseases in line with increasing urbanization and growing incomes. However, healthcare funding, primarily for conditions other than TB, HIV, and malaria, is predominantly out-of-pocket, posing affordability challenges, particularly for chronic diseases.

"As a key partner in the healthcare sector, our challenge is to help create a more efficient model for innovative and established medicines. This involves addressing generic competition, ensuring availability at pharmacy levels, and maximizing patient benefit. Our role in the healthcare supply chain is integral and helps make access to affordable and quality healthcare a reality. Our objective is to navigate this landscape by supporting a high-volume mature business through effective distribution while seeking avenues to enhance the availability of innovative products."



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*Number of new product approvals globally since 2011.



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A 'SHOT' TO 'HEALTHCARE COSTS'

The cost of treating patients is on the rise, and healthcare is under pressure from high inflation, rising wages, and other charges, while provider profit continues to be eroded. The increase in medical costs leads to medical inflation, a financial situation that companies address by implementing technology and data through prevention models as the core of their business model. Organizations must reshape strategies and business models and seize every transformational opportunity - from investments in innovation and technology to deals - for drastically different costs, capabilities, and business footprints.

Addressing the deep inequality in the country is a significant focus for **Ryan Noach**, heading one of South Africa's leading health providers.



"We believe that simultaneous regulatory changes are needed in both the private and public sectors. We are prepared to embrace change and actively contribute to it. I acknowledge that there will be differences of opinion, which is healthy in reaching the right solutions and we continue to invest and hold a positive outlook for the future."



Dr. Iain Barton designed and implemented an effective initiative to navigate health costs: "We started Unjani Clinics in 2010 for the sole reason of changing the focus from doctor-centered care to nurse-centered care. *The unit cost per engagement for a nurse practitioner is 17% of the cost of an engagement with a doctor,*" expresses

Dr. Barton. Unjani's mission is to empower black women nurses to become nursepreneurs and operate their private practices in low-income, rural communities where enhanced access to primary care is needed. By providing business skills training to nurses, Unjani creates sustainable businesses that sustain healthcare provision and offer employment opportunities. Unjani's impact is significant, with over 150 facilities on the ground in South Africa and over 600 jobs created through those facilities. The network provides

valuable primary healthcare consultations to the employed and uninsured market, with a record 100,000 consultations in March 2023 and over 3.7 million consultations since inception in 2014. "Unjani Clinics' focus on the employed and uninsured market -between 12 and 15 million people- provides an affordable alternative to government clinics, ensuring that the queues in government facilities become shorter and the unemployed can access care more quickly. The organization aims to have 600 clinics by 2030," shares **Lynda Toussaint**, CEO of **Unjani Clinics NPC**.



Hendri Hanekom, the **Managing Director of Intercare Group**, states, "Intercare has enabled clinic nurses, through our partnership with more than 150 Unjani Clinics countrywide, to connect digitally with Intercare doctors when clinically appropriate and at affordable prices for the end user. We believe in finding alternative ways to ensure the service is sustainable for the customer paying for it without decreasing the health provider's fees that need to be delivered. Affordability is linked to market dynamics. Many of our facilities are located in urban areas where most inhabitants are already insured patients. However, our partnerships extend our clinical reach to rural and peri-urban areas. We are working with funders to ensure that clinical protocols and pathways are followed, enabling us to deliver affordable quality care in a private facility if the patient requires it so. The optimization of resource utilization remains a pivotal facet of our management strategy."



Zwelethu Bashman, **Managing Director at MSD South Africa & Sub-Saharan Africa**, believes it is "effectively the ideal plug-in for an NHI or UHC system, and as health partners, we need to focus on scaling this model into as many communities as possible within South Africa and figure out how we can take this model and move it into other markets within Africa."



Finally, **Peter Wharton-Hood**, **Chief Executive Officer at Life Healthcare Group, South Africa**, reflects, "To provide more services to more people in the healthcare industry without compromising quality, we must develop innovative solutions to reduce costs. The most significant shift in the delivery of services that Life Healthcare is making in its South African operations is to increase patient volumes through our current infrastructure by creating better access."



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TOOLS FOR A SUSTAINABLE HEALTHCARE ROADMAP



"This year's key focus is achieving sustainable healthcare in the country, primarily emphasizing local production and manufacturing. As an African player with an international and global presence, Aspen plays a crucial role in achieving this goal through its regional and global manufacturing capabilities," shares Stavros Nicolaou, Group Senior Executive, Strategic Trade Development, Aspen Pharma Group South Africa



"Healthcare is a very complex insurance class; it differs from general, long-term, or short-term insurance," avers **Neels Barendrecht, Chairman of Agility Holdings, South Africa,** "It has millions of claim lines and touchpoints. It is quite complicated regarding coding, schemes, and tariffs. Healthcare is a field of research that is always evolving. If we do not follow its evolution, we will lag."



According to **Peter Wharton-Hood, Group Chief Executive at Life Healthcare,** "Pre-Covid, we had roughly 35% of available capacity that was not being used. Alternative reimbursement and partnership models that ensure a better alignment of incentives between providers and funders are key to raising occupancy levels, where organizations like ours need to provide products at lower price points in greater volumes." Peter believes that for the South African government to fulfill its promise to deliver NHI, it will take collaboration amongst all stakeholders. *"We are actively looking for ways to present partnership models to the government to enable it to use the private sector's ability to provide healthcare to state patients. We have concluded significant funder network deals with more than five South African leading medical schemes and administrators, making*

us a leading anchor provider for acute care. Based on value-sharing philosophy, we design value-based products that deliver holistic care to keep patients healthier, with better quality of life and reduced hospital admissions. This creates value for patients, providers, schemes, and the wider South African healthcare system."

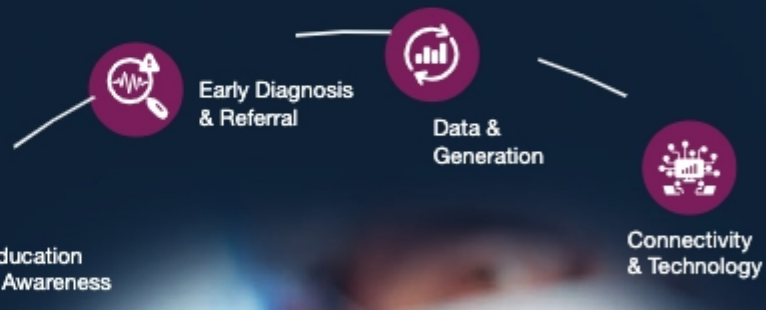
Another leading voice reflects "digital health that has the potential to be a pivotal part of delivering care and contribute to the ecosystem, making healthcare more accessible and affordable for more South Africans. In practices where a doctor works in a hybrid setting, we had to change our operational processes to support this new working method. Partnerships are crucial, and Intercare believes in collaboration," claims **Hendri Hanekom, MD of Intercare Group.**



On sustainability tools, **John Norman, Head of Africa Region, Acino Healthcare Group,** believes, "It is crucial to embrace diversity to succeed in the healthcare industry. Companies with a diverse portfolio have an advantage over highly specialized ones. *Healthcare companies must focus on developing a diverse portfolio and rapidly responding to changing market demands to ensure the availability of critical medicines to succeed in the long run.*"



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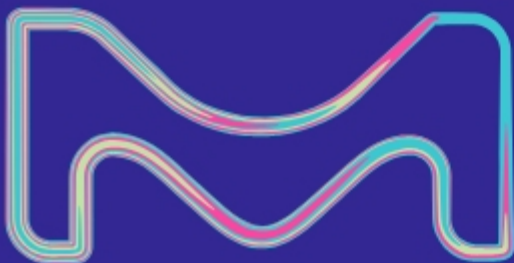
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FROM WORDS TO ACTION

*“What I am seeing in 2023 is that organizations are becoming more strategic on how they plan for the future. We are witnessing how words in 2022 have translated into actions in 2023. The Covid-19 pandemic has prompted many businesses to reevaluate their identities and make necessary changes to become more relevant in the ever evolving healthcare ecosystem. M&A activities, portfolio management, spin offs, IPOs, integrations or diversification of their supply chains, are some of the ways companies answer these questions and strive to become #1 (leaders) in their respective areas. During this journey, companies may need to let go of certain products to become nimbler and more relevant,” shares **Peter Mehlape, Managing Director, Medtronic, South Africa.***



1 This year, Guerbet has made a strategic change for the next ten years, focusing on artificial intelligence and refocused on the interventional imaging business.



Guerbet is determined to be at the forefront, showcasing its continued contribution to the future of medical imaging. “Guerbet Diagnostic Imaging has designed a portfolio of interconnected contrast imaging solutions to enhance decision-making at each point of the patient journey from diagnosis to treatment and follow-up, to focus on what matters most, efficiently improving patient outcomes,” shares **Mia Louw - General Manager, Guerbet, South Africa**

2 On GE HealthCare’s recent January spinoff, **Eyong Ebai, General Manager Sub-Saharan**



Africa, GE HealthCare, shares his thoughts on how the transition from an industrial business to a healthcare venture has been marked by purple, a vibrant symbol of passion. “We aim to enhance access and redefine healthcare’s capabilities, enabling us to provide exceptional care to patients under our clients’ care. The strategic direction is pivotal in our journey forward. From an African perspective, our focus magnifies the importance of oncology, cardiology, and neurology pathways. Leveraging digital technologies and a health-focused ecosystem, we are driving precision healthcare, striving for enhanced access across the SSA region.”

3 “The transition to highly specialized portfolios has already been made by some of our European affiliates, and I fully anticipate that we will move towards this in South Africa too. The question is how to manage the transition from an established product portfolio to one that embraces targeted oncology products, gene therapies, etc. Many international corporations are in the same boat. The boundaries of science are being increasingly pushed by global business strategies for innovative enterprises. We want to concentrate on three components, and we want to work with regulatory bodies to help tailored innovations enter the market faster,” reflects **Barnaby McKay Managing Director, Astellas, South Africa.**

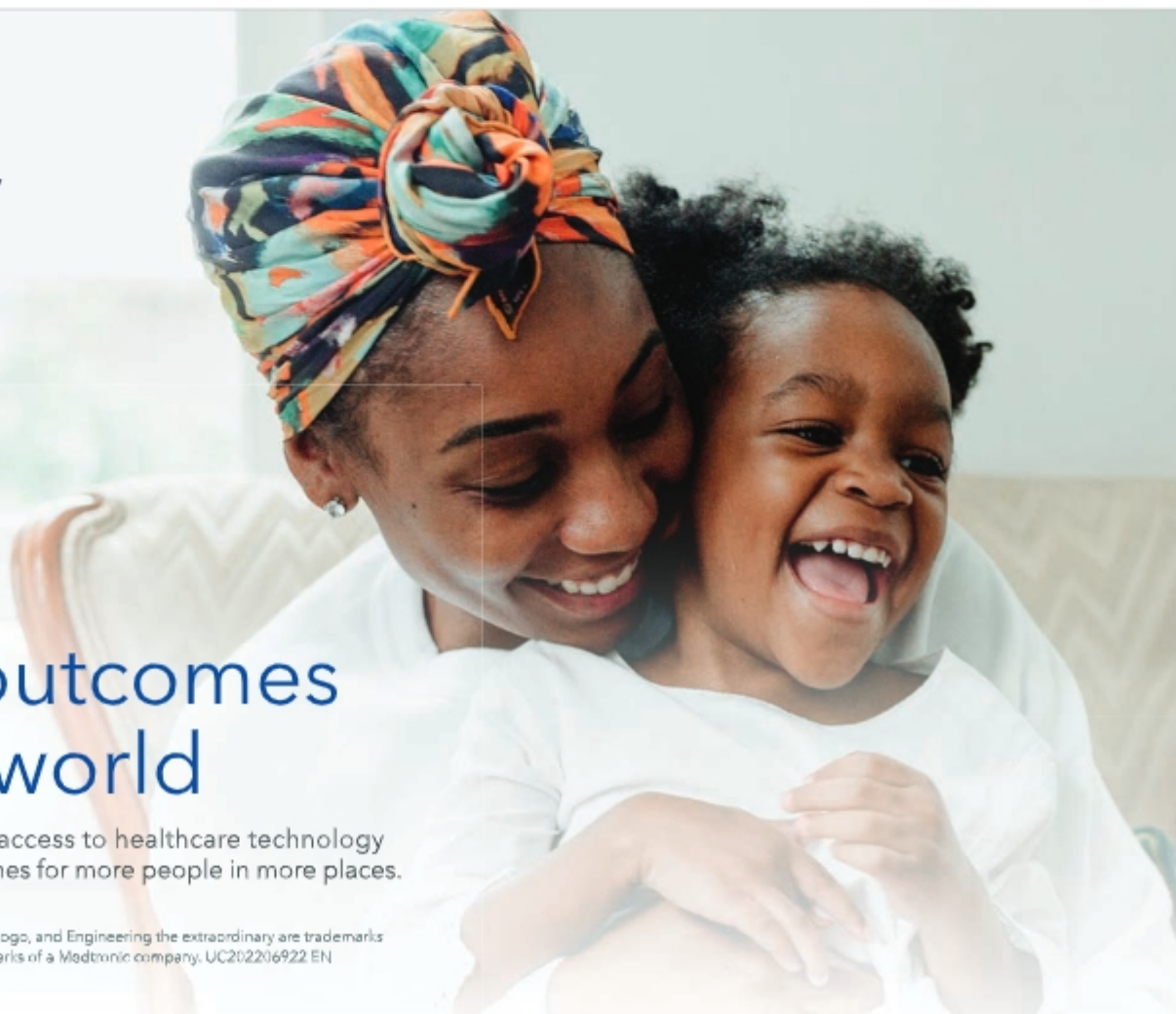


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AN AGENDA FOR VACCINE SELF- SUFFICIENCY

The African vaccine's market is projected to grow between 4 and 13% by 2030. The benefits of having local vaccine manufacturing are clear to **Ken Osei, Principal Investment Officer, Africa of the IFC**: "Localizing and regionalizing pharmaceutical and vaccine manufacturing can increase self-reliance and access to treatment." We see key players that are advancing the vaccine agenda.

Patrick Van der Loo from Pfizer acknowledges: "Only 1% of Africa's total vaccine consumption was produced within the continent." He is committed to "es-



establish a framework wherein 60% of vaccines will be manufactured in Africa by 2040." To this end, Pfizer has invested over R855 million in Biovac, a South African bio-pharmaceutical company, in the form of infrastructure and skills development.

Biovac is also working on a new project focused on cholera. **Dr. Morena Makhoana, CEO** of the company, elaborates: "We partnered with the International Vaccine Institute in South Korea to acquire their technology. Our goal is to manufacture the product for global markets, making us one of the few with R&D capabilities and end-to-end manufacturing potential."



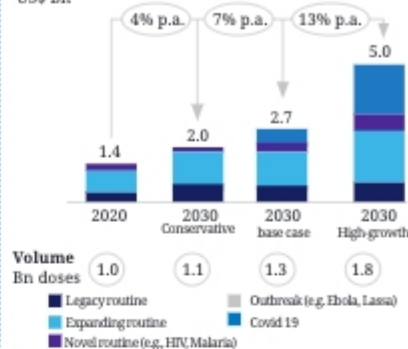
Afrigen is a Cape Town based biotechnology company focused on next generation vaccine adjuvants. **Dr. Petro Terblanche, CEO of Afrigen** says: "In the past two years, we have built a vertically integrated team in the vaccine space. We have grown to a staff of well qualified, specialized skilled individuals, boasting an unparalleled end-to-end vaccine facility on the continent." The first adjuvant production and formulation technology center in Africa was built by Afrigen, which helps patients develop a stronger immune response when receiving the vaccine.



African vaccine market forecasted growth by 2030

Estimated African vaccine market forecast

US\$ Bn



Main growth drivers

- Demographics:** Highest population growth rate.
- Vaccine access:** Long term investments driving improvements in national immunization program.
- New developments:** Several new products are under development for Africa (Malaria, HIV, Ebola, Lassa fever) which could represent up to 10-15% of the total market by 2030.

“Together, we create hope for tomorrow, by pioneering transformative solutions on our African soil.”

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A NEW GENERATION OF STEWARDS OF HEALTH

Innovation, emerging technologies, and global demographics need new models of care to face ever-evolving challenges. Achieving a balance between quality and affordability of care is no easy task for business leaders. A new generation of executives in South Africa share their skillsets and priorities as they lead organizations and advance a healthcare agenda to shape sustainable models and strategies, that promote healthy stakeholder relationships, healthy portfolios and businesses.



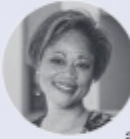
+ Rachel O'Neale, Country President at Novartis

"Over the next decade, we are considering partnering to strengthen the healthcare system, improve patient flow, expand treatment options, and ensure timely interventions for needy patients. Working in healthcare right now in South Africa is exciting. We are at the threshold of a National Health Insurance (NHI) that aims to bring equity to an inequitable healthcare system finally."



+ Ahmed Rami, General Manager for AbbVie South Africa & Region Africa

"Having worked for AbbVie for almost ten years, I've had the privilege of working in the US, Egypt, and Saudi Arabia previously, and it is inspiring for me to come "home" to Africa. I'm excited about the opportunity to serve the needs of our patients both in South Africa and Region Africa."



+ Wendy Cupido, General Manager at Roche South Africa

"I am committed to engaging with key stakeholders, including government health agencies, local healthcare providers, and patient advocacy groups. Their insights are invaluable in understanding the unique needs and obstacles faced by patients in different regions."



+ Cesar Nieto, General Manager & Head of Human Pharma, Boehringer Ingelheim

"The opportunity is about unlocking access to innovative medication for the patients who truly need it in South Africa. At BI, our mission is to positively impact as many lives as possible, both human and animal. With this unique opportunity, I want to ensure that I and the team live our company's purpose of transforming lives for generations. The Southern African operation also focuses strongly on our people. We embrace a strong company culture based on our agility, accountability, and intrapreneurship values. We aim to create a solid and sustainable business that will thrive for future generations. We actively look to address future health challenges."



+ Ahmed El Hofy, General Manager, Janssen South Africa

"Our priority is to ensure broader access to our current portfolio in innovative medicine for patients. We are focused on this goal and are trying to ensure this through our partnerships and

engagements with various stakeholders. Our second priority is being 'people-focused'. We want to ensure we grow our organization as a future leader in South Africa and beyond. I feel a sense of responsibility for my team and myself to make things happen for South Africa for the sake of the entire African continent. These are the six therapeutic areas in which we believe Janssen can provide a lot of transformative innovation that can make a big difference and significant improvement in patients' lives : oncology, immunology, neuroscience, infectious disease and vaccines, cardiovascular metabolism, and pulmonary hypertension. Our role at Janssen South Africa is to transfer this innovation to the South African population through broader access, launch excellence and having the best talents working for J&J.



+ Deepak Arora, Country President, African Cluster, AstraZeneca

"AstraZeneca is weaving together a dynamic network, both physical and virtual, marked by partnerships. At its core lies an unwavering commitment to patient-centric disease management and frugal innovation. We have partnered with leading innovators through an Innovation Hub, including Medsol AI, Tricog, and Qure.ai. These ground-breaking initiatives are all part of AstraZeneca's mission to uplift healthcare across sub-Saharan and French-speaking Africa through the A. Catalyst Africa Health Innovation Hub."



+ Cesar Buendia, General Manager at Eli Lilly South Africa

"I am excited that my nine years of experience working as GM across Latin America, can provide value to the organization and its objectives of expanding access and introducing innovative medicines to improve the life of people in South and Sub-Saharan Africa. This is part of a region that has the biggest population therefore the biggest impact. Lilly's strategy is constant focus on innovation, and Covid-19 has taught us that innovation is vital and sometimes the main response to complex issues. With this we dedicate resources to creating lasting social impact in Africa's population."



+ Abrie Hanekom, Managing Director at Accord Healthcare, South Africa

"Accord Healthcare, as a subsidiary of INTAS Pharmaceuticals, is uniquely positioned to offer cost-effective solutions to patients in need of high-cost medicines. Our robust strategy aligns with our vision for the company. Guided by our "Make It Better" philosophy, we are committed to driving operational excellence and realizing our ambitions."

Bringing innovative healthcare solutions to pave the way for a healthier Africa.

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At Bayer we believe trust and open communication is required to create collaborative spaces to formulate ways of delivering affordable healthcare to low-and-middle-income households in South Africa and across Africa



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Unjani Clinics is a non-profit company that aims to bring quality, affordable healthcare services to communities across South Africa. Through a successful social franchise model, we have been able to build a sustainable network of clinics owned and run by black women professional nurses, improving healthcare quality and access while creating employment in our communities.

We have achieved this through a unique approach to growing our footprint of care settings. Our innovative blended financing and business model ensures the commercial viability and sustainability of each clinic, with support from our committed and loyal partners and funders. We aim to make quality, affordable primary healthcare services more accessible, while driving sustainability at every level.

Our mission is not only to create and improve access to quality, affordable primary care, but to advocate for accessible healthcare, while building a foundation that enables and empowers our nurses and their patients. In this way, we allow our network to flourish and empower healthcare access in South Africa.

Connect with us today to learn more about how we can drive a return on social investment that is aligned with your unique social upliftment strategies.



EMPOWERING HEALTHCARE

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AN AGENDA FOR WOMEN'S HEALTH



"If anyone wants to help Africa, democratizing women's health is the first step.

I have helped the organization integrate its thinking more effectively, partnering with NGOs and the government to ensure we dovetail all the different initiatives. The whole is greater than the sum of the parts," declares Colin Tyrer, VP Cluster Head Pharma South East and West Africa at Bayer Pharmaceuticals. He expands on one of their initiatives: "Bayer is committed to enabling 100 million more women in low-and-middle-income households to access contraception by the end of the decade. We have also brought long-acting contraception into the state tender in South Africa at a much lower cost than in the private sector. We work with all the provinces, clinicians, and nurses to fit intrauterine system (IUS) devices, making a massive difference in women's lives."

"Women are the caregivers and pillars of society, forming the bedrock of thriving economies. By improving women's health, we can uplift entire

nations," shares **Abofele Khoele, Managing Director, Organon South Africa**, the MSD spin-off focusing on Women Health, adding, *"remarkable advancements in femtech propel women's health to the forefront of the 21st century. It means addressing current issues while embracing cutting-edge technologies that drive substantial change. Undoubtedly, women's health stands at the forefront of progress and development."*



In Africa, the statistics are disheartening, especially concerning breast, cervical, and prostate cancers. Cervical cancer is preventable and curable in developed healthcare systems. "Good screening programs are crucial because the negative consequences of late diagnosis in Africa are very discouraging," notes **Ian Wakefield, General Manager Africa at Becton Dickinson**, "In low-income countries, women have twice the risk of developing cervical cancer compared to high-income countries, which is six times higher for HIV-positive patients, highlighting the need for early intervention screening programs and education." **Becton Dickinson** is involved in a private partnership with COWHA, "comprising Organon, ourselves, and Hologic, to prioritize women's health and promote the use of preventive care to avert adverse outcomes. In Africa, late diagnosis in individual countries often translates to high mortality rates of 50 to 60%, impacting younger women who are active members of society. Therefore, investing in screening and education in oncology, especially cervical cancer, across various settings would yield a meaningful impact from both a societal and healthcare perspective."



Overview of Scenarios of Cancer in Africa

	Breast				Cervix				Scenario 1 (realistic): Best benchmark within SSA (Namibia) Scenario 2 (full potential): Benchmark HIC (Netherlands) OS-Observed LYs=Life years
	Metric	Status Quo	Scenario 1	Scenario 2	Metric	Status Quo	Scenario 1	Scenario 2	
Kenya	3-yr OS (%)	56.7	87.1	92.0	3-yr OS (%)	35.9	58.4	73.0	
Ivory Coast	3-yr OS (%)	44.8	87.1	92.0	3-yr OS (%)	27.8	58.4	73.0	
Rwanda	3-yr OS (%)	31.5	87.1	92.0	3-yr OS (%)	26.6	58.4	73.0	

Source: IFC/ Roche July 2023 study



A VIEW INTO THE 'ORTHOPAEDICS' FUTURE

"We are a global medical technology leader with a comprehensive portfolio designed to maximize mobility and improve health. My objective when I joined Zimmer Biomet during the pandemic, was to establish and prioritize 'emerging markets' as a distinct region within the company. This translated into building a unique identity and robust strategic plan," shares Erik Antos, Vice President of EMEA Emerging Markets, Zimmer Biomet



"Over three years, we reorganized the region and established a leadership

team in four sub-regions and this transformed the organizational structure and gave us focus. We continue to optimize our portfolio so that we can deliver a profitable pipeline and achieve sustainable long-term growth. With the industry facing growing populations and increasing costs, the use of data and AI, can help the healthcare industry make smarter decisions, deliver more efficient care, and achieve better outcomes for patients, claims **Arifa Charafaray, General Manager, Zimmer Biomet, South Africa**.



Charafaray adds, "Medtech is adept in harnessing the power of robotics, artificial intelligence, mixed reality, and predictive data analytics to help surgeons transform patient outcomes. Zimmer Biomet's Persona IQ is an example; a "smart knee" with sensors can transmit data about how the replacement works. Healthcare teams then track steps, range of motion, and other metrics after surgery. With such technology, healthcare is more predictive and less reactive."

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A CATALYST NETWORK: INTERCONNECTING HEALTH INNOVATION HUBS ACROSS THE GLOBE

At the heart of AstraZeneca's pioneering initiatives lies the A.Catalyst Network, bringing together diverse stakeholders to forge non-traditional partnerships across geographical boundaries, facilitating collaborative action and opening new opportunities to enhance patient-enabled innovation. It opens new avenues, fostering innovative solutions that maximize patient experiences and outcomes.

AstraZeneca's commitment to patient-enabled innovation is evident through the network's multifaceted approach. With over 500 partnerships and mentorships provided to more than 300 startups, AstraZeneca isn't merely fostering growth; it's nurturing a healthcare revolution. "Our alliance with AI platforms such as Medsol AI, Tricog, and Qure.ai, operating within the A.Catalyst Africa Health Innovation Hub reinforces our commitment to transformative innovation for Africa," states **Deepak Arora, Country President of the African Cluster with AstraZeneca.**



Along the same lines, the exclusive Breast AI technology, championed by Medsol AI, is a testament to this commitment. It facilitates swift breast cancer diagnoses, ensuring timely treatments and saving lives. "Our partnership with AstraZeneca made us realize the importance of our non-profit initiatives when it brings people to the hospitals," adds **Dr. Kathryn Malherbe, Director at Medsol AI.**



The network's impact is not merely measured in solutions developed; it's about weaving a global fabric of healthcare excellence. AstraZeneca's initiatives, such as Yes2Life and Yes2Breathe, exemplify this dedication. By leveraging technology and partnerships, A.Catalyst Network has successfully educated patients, raising awareness virtually and making health education accessible. This holistic approach ensures quality healthcare and empowers individuals with knowledge, making them active participants in their well-being.

A.Catalyst Network is a testament to AstraZeneca's commitment to transforming healthcare paradigms. Through collaboration, innovation, and an unwavering focus on patients, AstraZeneca and its partners are not just advancing in creation; they are pioneering a future where healthcare is not just a service but a holistic experience that touches lives globally.

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WHAT ARE 2023'S KEY HEALTHCARE TRENDS IN SOUTH AFRICA?



1 Making biological products more affordable and accessible to patients. South Africa's healthcare system is strained due to a triple disease burden, including communicable and non-communicable diseases, and mechanical causes such as violence and road accidents. The rising tide of diabetes, metabolic syndrome, and various forms of cancer has put pressure on the system. Despite the availability of innovative treatments the challenge is to make such treatments affordable and accessible.

2 Public-private partnerships, represents a positive step towards achieving universal health coverage and addressing the significant inequality in healthcare. Acknowledging that both have their benefits and inefficiencies.

3 Increasing the conversation around industrial integration across Africa and an emphasized urgent need for international procurement reform to enable Africa to procure 30% to 60% of its vaccine requirements, as it imports 99% of its vaccines. These positive trends present great opportunities for partnerships, consolidating and integrating Africa's pharmaceutical industry trajectories.

4 Partnerships, especially when facilitating technology transfers and treatment access. The importance of teamwork in technology transfer, knowledge sharing, and leveraging manufacturing competence cannot be overstated.

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