



# The Nigerian Health Sector





# Country Stats

- Land mass – 923,768 square kilometers (twice size of California)
- GDP: \$521.8 billion (2013) – largest in SSA
- 5.4% GDP Growth Rate (2013), projected to grow 7.3% in 2014
- 8.5% Inflation (2013)
- Population: 173.6 million (2013) - 48% under 15 years of age
- Over 250 ethnic groups





## Health Stats (WHO; 2012)

- Life expectancy at birth (m= 53/ f=55)
- Physician (per 1,000 persons) 0.4
- Mortality Infant (per 1,000 live births) 77
- Nurses/midwives (per 1,000 persons) 1.605
- Total expenditure on health per capita \$161
- Number of beds (per 100,000 persons) 5
- Disease Burden Malaria & TB





# Health Spending Stats

- Households = 69%
- Federal Government = 12%
- States = 8%
- Local Governments = 4%
- Development Partners = 4%
- Firms = 3%

(Source: Federal Ministry of Health)





# Health Spending – Medical Tourism

- Annual spending on medical tourism = \$500-\$800 million
- India, Europe, USA and Persian Gulf top destinations
- 47% (est. 18,000) of Nigerians who visited India in 2012 spent \$260 million –about \$15,000 per medical tourist
- Major ailments treated include; open heart surgery, renal transplants, brain surgery, cancer and eye treatment.





# Public Sector Healthcare System

- **Tertiary Healthcare System – Federal Govt.**  
Federal Medical Centers and University Teaching Hospitals (Totaling about 47)
- **Secondary Healthcare System – States**  
General Hospitals (About 700) & Maternities (More than 1,700)
- **Primary Healthcare System – Local Governments**  
Health centers (More than 4500)





# Private Sector Healthcare System

- Include private (for profit), faith-based and voluntary not-for-profit hospitals
- Accounts for about 40% of all healthcare facilities nationwide. Growing and heavily utilized but offer poor quality services
- Mostly concentrated in urban areas and receives the highest percentage of patronage
- Data on private sector difficult to collect





# What is Happening? – Govt. Efforts

- National Strategic Health Development Plan (NSHDP) 2010-2015
- Total estimated cost of NSHDP for the six years = \$26.7 billion
- National Health Insurance Scheme (NHIS) expanded and National Health Bill reviewed by both national legislative houses now awaiting Presidential assent.
- Public hospitals being upgraded and modernized and Specialist hospitals and high-end diagnostic centers being built
- Massive training of health personnel
- Investment drive in health sector





# Industry Trends

- Medical devices market size = \$154 m (2013). Forecasted to reach \$227m in 2018. Diagnostic imaging devices import leading growth.
- Germany (Siemens) dominates market narrowly followed by U.S. (GE)
- Pharmaceutical market size = \$1.28b in (2013) and imports = \$481m (2013) expected to gain 10.4% to reach \$789m in 2018
- Pharmaceutical imports dominated by Asia (India & China). U.S. market share not more than 10%, mainly in high potency antibiotics.
- Counterfeiting of medicines, corruption and poor pharmaceutical regulations govern the market





## Opportunities – For Trade & Investment

- Specialist hospitals, trauma centers, diagnostic centers and mobile clinics
- Pharmaceutical manufacturing –generic drugs eg. ARDs, ACTs, rapid diagnostic test kits (HIV, malaria), infant and maternal care technologies and products
- Central medical library, reference laboratories for quality assurance, and undergraduate and post graduate training institutions





## Entry Barriers

- Import of medical formulations falling under HS Code 3003 and 3004 prohibited.
- NAFDAC regulates food, drugs and medical devices and require products to be registered prior to import
- Import tariff on most drugs, vitamins and supplements is 20%
- There is a zero duty on medical devices





## More Questions?

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