

Healthcare and Pharmaceutical Opportunities

Africa's Growing Healthcare Demand, Pharmaceutical Manufacturing Transformation and the Strategic Role Pakistan Can Play



Africa combines major unmet healthcare needs with an accelerating drive toward local pharmaceutical manufacturing, regulatory harmonization, pooled procurement, health technology and resilient medical supply chains. Pakistan can contribute through affordable generics, surgical instruments, hospital supplies, digital health and long-term production partnerships.

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AT A GLANCE

Key Healthcare & Pharmaceutical Indicators

70-100% Finished pharmaceuticals imported	~99% Vaccines historically imported	649 Plants across 29 countries	60% Local ambition by 2040
265M African malaria cases, 2024	26.3M People living with HIV	US\$458M Pakistan pharma exports	US\$445M Pakistan surgical exports

Primary references: WHO African Region, Africa CDC, WHO World Malaria Report 2025, State Bank of Pakistan and Pakistan Bureau of Statistics.

OVERVIEW

Executive Summary

Healthcare in Africa is undergoing a demand transformation and a supply transformation at the same time.

Population growth, urbanization, infectious diseases, noncommunicable diseases, maternal and child health requirements and wider universal health coverage are increasing demand for medicines, diagnostics, hospitals, devices and healthcare services.

Governments are simultaneously working to reduce import dependence and build regional health-product industries. Pakistan's strongest path is: Export -> Registration -> Distribution -> Institutional Procurement -> Local Partnerships -> Contract Manufacturing -> Joint Ventures -> Regional Production.

01-02

Why African Healthcare Demand Is Growing

WHO estimates that the African Region accounted for approximately 265 million malaria cases and 579,000 deaths in 2024. Around 26.3 million people were living with HIV, while noncommunicable diseases already account for roughly 37% of deaths in the Region.

Infectious Disease Antimalarials, rapid diagnostics, laboratory products, HIV and TB products.	Chronic Disease Cardiovascular, hypertension, diabetes, cancer and respiratory products.
Maternal & Child Health Essential medicines, diagnostics, supplements and hospital supplies.	Health Workforce Telemedicine, laboratory systems, decision support and remote diagnostics.

Affordability remains fundamental. More than 423 million people experienced financial hardship from out-of-pocket healthcare spending in 2022, reinforcing demand for quality-assured affordable products and efficient supply chains.

03-04

Africa Is Moving Toward Pharmaceutical Self-Reliance

WHO's 2025-2035 framework states that countries in its African Region import 70-100% of finished pharmaceuticals, about 99% of vaccines and 90-100% of medical devices and active pharmaceutical ingredients. Approximately 649 pharmaceutical plants were identified across 29 countries.

African leaders have reaffirmed an objective of meeting at least 60% of continental health-product requirements through local manufacturing by 2040, covering pharmaceuticals, vaccines, diagnostics and medical devices.

Technology Transfer Pakistani know-how paired with African manufacturing capacity.	Contract Manufacturing Production for African brands and distributors.
Local Packaging Bulk product from Pakistan with compliant local finishing.	Joint Ventures Shared capital, market access, technology and operations.
Industrial Zones Production supported by government zones and infrastructure.	Regional Hubs Country-level execution serving surrounding markets.

05-07

Pooled Procurement, AMA and WHO Prequalification

The Africa CDC-led African Pooled Procurement Mechanism aggregates demand across African Union member states to improve purchasing power, availability, supply resilience and market shaping while supporting capable African manufacturers.

The African Medicines Agency is strengthening continental regulatory coordination and building on the African Medicines Regulatory Harmonization programme. National marketing authorization nevertheless remains essential.

WHO prequalification assesses eligible medicines, vaccines, diagnostics and other health products against international standards. More than 1,700 products were listed by the end of 2025, providing an important pathway toward donor tenders, government procurement and wider market credibility.

08-10

Pakistan's Competitive Base

Pakistan's pharmaceutical exports increased 34.2% to US\$458 million in FY2024-25. The State Bank of Pakistan linked part of this growth to improved access under the Engage Africa Policy, including Congo, Ghana, Djibouti and Sudan.

Pakistan exported approximately US\$445 million of surgical goods and medical instruments in FY2023-24. Sialkot's established cluster produces precision instruments including forceps, scissors, scalpels and clamps.

Opportunity	Potential Pakistani Offering
Essential Medicines	Affordable branded and unbranded generics
NCD Medicines	Cardiovascular, hypertension, diabetes and chronic-disease products
Hospital Products	Injectables, IV products, consumables and institutional formulations
Surgical Instruments	Forceps, scissors, clamps, scalpels and precision instruments
Diagnostics	IVDs and products meeting destination standards
Contract Manufacturing	Production for African brands and distributors
Healthcare IT	Hospital, telemedicine, laboratory and pharmacy systems
Supply Chain	Warehousing, logistics and cold-chain partnerships

African Markets to Prioritize

Kenya East African manufacturing and distribution hub with a formal PPB authorization pathway.	Nigeria Large-scale market with NAFDAC requirements for imported medicines and devices.
South Africa Sophisticated SAHPRA-regulated market with demanding standards.	Egypt Major manufacturing base with detailed EDA registration guidance.
Ghana & Tanzania Important domestic and regional markets with established regulators.	Rwanda & Ethiopia Transparent regulatory gateways with published or digital processes.

Standard Pharmaceutical Market-Entry Process

01 Market & Portfolio Evaluate disease burden, demand, margins, competition and procurement.	02 Eligibility Review Confirm GMP, country-of-origin status, WHO PQ and restrictions.
03 Local Representative Select a technically competent and credible local agent where required.	04 CTD/eCTD Dossier Compile quality, safety, efficacy, stability, CPP, CoA and labelling.
05 Assessment & GMP Respond to regulator questions and complete inspections.	06 Marketing Authorization Obtain approval before commercial supply.
07 Import & Distribution License importer, warehousing, cold chain and pharmacovigilance.	08 Institutional Sales Monitor tenders, hospitals, donors and pooled procurement.

Pakistan's export readiness depends on DRAP registration, current GMP compliance, validated quality systems, documentation integrity, stability evidence and applicable export permissions.

Vaccines, Devices, Digital Health and Supply Chains

Vaccines Gavi's AVMA can make up to US\$1.2 billion available over ten years to support commercially viable African manufacturing.	Medical Devices Certification, traceability, sterile packaging, distributor training and after-sales support can extend Pakistan's surgical advantage.
Digital Health Hospital systems, telemedicine, laboratory platforms, pharmacy systems, analytics and BPO can address access constraints.	Logistics & Cold Chain Verify warehousing, temperature control, inventory, traceability, recall capability and last-mile reach.
Manufacturing Finance Combine sponsor equity, African investors, development finance, incentives and procurement commitments.	Institutional Procurement Monitor Africa CDC, Global Fund, UNGM, government and hospital channels.

Key Risks and the 2026-2035 Outlook

Risk	Practical Response
Regulatory Delay	Realistic timelines and complete, responsive dossiers
Quality & Compliance	GMP, pharmacovigilance, traceability and post-market surveillance
Distributor Risk	Verify licences, storage, sales reach, finance and relationships
Price & Payment	Assess tender price, FX, reimbursement and payment cycles
Supply Chain	Inventory, cold chain, alternate routes and continuity plans
Localization Policy	Plan for technology transfer and local-content preferences
From export-only to local presence Build durable registration, representation and distribution.	From distributor dependence to verified partnerships Measure operational capability, not promises.
From single-country sales to regional strategy Use hubs while respecting national authorization.	From generic volume to qualified procurement Target WHO PQ and institutional channels selectively.
From supplier to healthcare partner Combine products with technology, training and local production.	

INSTITUTIONAL ROLE

PAC Perspective

Pakistan should move from pharmaceutical exporter to healthcare partner.

Market Research Disease, demand, pricing and competition analysis.	Distributor Search Partner identification and commercial capacity checks.
KYC & Due Diligence Ownership, licensing, storage, finance and reputation.	Regulatory Partners Qualified local representation and dossier coordination.
Tender Intelligence Institutional and government procurement monitoring.	Manufacturing Partnerships Technology transfer, contract manufacturing and joint ventures.

ESSENTIAL FINDINGS

Key Takeaways

70-100% Finished pharmaceutical import dependence.	99% Vaccines historically imported.
60% by 2040 Continental local-manufacturing ambition.	265 Million African malaria cases in 2024.
US\$458M Pakistan pharma exports in FY2024-25.	US\$445M Pakistan surgical exports in FY2023-24.

Africa needs affordable, quality healthcare products while building local manufacturing. Pakistan can contribute most effectively through regulatory compliance, technology transfer, local partnerships and long-term commercial presence.

TRANSPARENCY

Data & Methodology Note

This report draws primarily on official information from WHO, Africa CDC, the African Union, Gavi, the Global Fund, African medicines regulators, the State Bank of Pakistan, Pakistan Bureau of Statistics, TDAP and DRAP. Disease statistics generally refer to 2024 data published during 2025-2026; Pakistan trade figures use fiscal years.

Official links were reviewed on 28 August 2026. Manufacturing conditions, tender rules and regulatory requirements change. This report provides market intelligence and commercial guidance, not medical, regulatory or legal advice.

Important Reports, Policies & Official Reading

- [WHO - Africa Local Manufacturing Framework 2025-2035](#)
- [Africa CDC - African Pooled Procurement Mechanism](#)
- [African Union - African Medicines Agency](#)
- [WHO - Prequalification of Health Products](#)
- [WHO - World Malaria Report 2025](#)
- [Gavi - African Vaccine Manufacturing Accelerator](#)
- [Global Fund - Quality Assurance](#)
- [State Bank of Pakistan - Annual Report 2024-25](#)
- [Pakistan Bureau of Statistics - External Trade FY2023-24](#)

- [TDAP - Pharmaceuticals](#)
- [DRAP - Pharmaceutical Guidelines](#)
- [Kenya Pharmacy and Poisons Board - Market Authorisation](#)
- [NAFDAC - Imported Drug Registration](#)
- [SAHPRA - Licences and Permits](#)
- [Egyptian Drug Authority - Regulatory Guidelines](#)

EXPLORE HEALTHCARE & PHARMACEUTICAL OPPORTUNITIES ACROSS AFRICA

Move from product potential to compliant market entry.

PAC supports pharmaceutical companies, medical-device manufacturers, healthcare investors and technology providers entering African markets.