



THE GROWTH CONTINENT

Africa stands at a defining moment for health and growth. In 2025, the continent navigates rising care costs, tighter budgets, and renewed geopolitical tension. However, South Africa's G20 health presidency, which ran from December 2024 to November 2025, gave African leaders a platform to turn those pressures into a shared agenda for access, resilience, and locally anchored capability across regulation, manufacturing, and financing.





*“As a country, we appreciated the opportunity to chair the G20,” says **Dr Tebogo Makube**, Chief Director of Industrial Procurement and Development at the dtic “Our focus was on inclusive growth, with health at the center of that agenda. This aligned with the Sustainable Development Goals, particularly in reducing poverty and advancing the role of women in society. We used the G20 as a platform to push for this position and to attract the necessary investments.”*





The macro environment remains complex and that complexity tests execution. **Stavros Nicolaou**, Group Senior Executive at Aspen Pharma Group, places the health agenda within a wider economic picture. *“Price instability and inflation placed a significant burden on an already shrinking health budget, further affected by reduced U.S. contributions. The positive side is the opportunity to diversify exports and strengthen partnerships. Sometimes a crisis forces action, and that is what happened. It required a more creative approach to transitioning from donor-funded to self-funded, sustainable public-health services.”*

“By 2050, statistics indicate that at least a quarter of the world’s population will come from Africa. It’s an enormous expectation that comes with a massive opportunity. The focus needs to be on investment, on trust, and on making Africa a place where people want to spend their money. For that, we need a concrete plan that highlights the opportunities across the continent.”



continent and makes them real.” **Kelly Widdop**, Country Divisional Head SEA, Bayer Consumer Healthcare

“We’re at an inflection point, shifting from heavily donor-funded health systems to increasingly domestically funded ones. That’s a big transition, and it’s happening now. As a company and part of the industry, we’re walking alongside Africa through this shift.” Dr Allan Pamba - Executive Vice-President Diagnostics, Roche Diagnostics, Africa.

“As the first G20 to be held in Africa, the continent will benefit as more attention is paid to regional developments like the Africa CDC and the Treaty establishing the African Medicines Agency (AMA). At IPASA, we aim to have played a significant role and to be seen by government as a reliable partner. There will be give and take, and our industry will be held to high standards locally and internationally.” **Bada Pharasi**, Chief Executive Officer, Innovative Pharmaceutical Association of South Africa



Executive Forecast captured insights from more than 60 industry executives to highlight the evolution of the health and life sciences sector in South Africa and across the African continent. Read the interviews here: <https://www.executiveforecast.com/regions/africa>

HEALTH SOVEREIGNTY: DIRECTIONS TO SELF-RELIANCE



Dr Jean Kaseya, Director General of the Africa CDC, points to the urgency behind building systems that can prevent, detect, and respond. For him the G20 platform “was a pivotal opportunity for the entire African continent to present a unified agenda rooted in its own vision for health sovereignty and security.” Kaseya emphasized how between 2022 and 2024, Africa saw a 41% surge in epidemic events. “These figures are not just numbers. They are a call to action,” he states and adds:

“We leveraged the G20 platform to advocate for genuine global support. This is not charity. It is a partnership that empowers Africa to build a resilient, self-reliant health system capable of protecting its own populations and contributing to global health security.”



Nonetheless, policy intent must be translated into industrial capability. **Professor Nicholas Crisp**, Deputy Director-General at the National Department of Health, sets out the operating logic. *“Our focus at G20 was to assert Africa’s place. We want to stop being perpetual aid recipients. We aim to establish a domestic pharmaceutical market, collaborate on API production, and ensure regulators are taken seriously. For that, we need harmonized standards and regional collaboration. South Africa’s market alone, 63 million, is too small. We need all one billion Africans to work together.”*



Following this same line of thought, **Dr Boitumelo Semete-Makotela**, CEO of SAHPRA, describes the need to shift from local firefighting to establishing a solid long-term strategy. *“Around the world, governments are increasingly focusing on self-sufficiency. So, it makes sense for us to ask how we can support our local manufacturers. Not by excluding others, but by implementing systems that give local players a fair advantage. We need to ensure SAHPRA remains a strong and relevant authority. Advanced medicinal therapies and AI in medical devices are changing the landscape. We must align with global best practices.”*



To make South Africa’s path towards a more sovereign system, financing models also evolve. **Dr Iain Barton**, Founding Principal, Health 4 Development, tracks the move from dependence to domestic responsibility. *“Over the past 25 years, donor funding went from dominating healthcare budgets to being just one part of the equation. Today, individuals account for over half of healthcare spending through out-of-pocket payments. Reliance on foreign governments for core services is unsustainable. Sustainable progress depends on developing domestic funding sources and more efficient models of care.”* His practical advice is to blend roles. *“True universal health coverage will only be achieved through integration of both public and private sectors. The government should act as a strategic purchaser to secure better prices and larger volumes while enabling private investment. Collaboration, not competition, will drive real progress.”*



The end point is not self-reliance for its own sake, but dependable access, better outcomes, and economic participation at scale. As **Dr Tebogo Makube**, dtic puts it, *“This is Africa’s chance to lead not only as a participant in the global economy, but as a shaper of its future.”*



“If Africa is serious about resilient health systems, we must move from managing disease to prevention through clean water, vaccination, lifestyle changes, and education. The triple burden of infectious disease, rising noncommunicable disease, and injuries makes the current model financially unsustainable. We need a fundamental reset in how we invest, including local manufacturing, and we must prioritize preventive vaccines such as HPV, RSV, maternal immunization, and gonorrhea to bring new preventive products to both existing and new markets.” **Petro Terblanche**, CEO, Afrigen Biologics, South Africa



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PARTNERING FOR A HEALTHIER TOMORROW



ACCESS MEETS AFRICA

Access is where ambition meets everyday care. Across South Africa and the wider region, leaders are translating strategy into solutions that patients can actually reach and afford. That means aligning clinical quality with price, building local capacity, and designing models that fit how people live and seek care.



“One of our primary responsibilities is determining how to apply our broader strategic goals in various local contexts effectively. Regardless of our location, we consistently face the same four key customer problems, which impact our patients: patient awareness, reducing surgical site infections, healthcare efficiency, and enhancing patient outcomes. Our goal is to provide high-quality products and solutions that deliver the desired outcomes for people, while maintaining a fair and accessible price point aligned with local healthcare system capabilities.” states **Erik Antos**, VP EMEA Emerging Markets, Zimmer Biomet.

Vaccines show how localization can move from policy to practice. *“In vaccines, we focused on localization, continued investing, and positioned South Africa as a pioneer in the ‘Africa for Africa’ roadmap. But it is also about shaping the environment to bring global R&D innovation to South Africa, so that patients and the wider population can fully benefit. That is our role and mission, Sanofi as a public health and innovative partner in South Africa.”* observes **Jean-Baptiste Bregeon**, Head of Vaccines and Country Lead, Sanofi South Africa.



Meanwhile, access also depends on clear information at the point of use. **Nicola Brink**, CEO of the Self-Care Association, explains why simple but practical solution like a QR-enabled national directory for SAHPRA-registered medicines matters: *“Paper leaflets get lost or are unreadable, and online searches can point to the wrong formulation. We built a verified, accessible directory so people get the right guidance for the product in front of them.”* Better information reduces misuse, supports pharmacists and nurses, and lowers avoidable costs.



From the same consumer focus **Farhan M. Haroon**, General Manager, Haleon South Africa, sustains: *“If we can provide not just products but also education to support them, people can take better care of themselves. Take anemia: if someone receives the right iron supplementation for six months, they can be anemia-free. But that starts with awareness.”* He adds: *“2025 has been a challenging year. The GDP has slowed. In such an environment, access becomes even more important; it does not just mean low-cost products. It means the right solution, at the right price, in the right format, and at the right place. If someone only needs two tablets, they should not have to buy a full pack. We need to be available in the right proposition, accessible but tailored to need.”*

Re-thinking how costs are assessed in health links directly to innovation. As **Shaun Nomame**, General Manager, Takeda South Africa, notes: *“To unlock the potential of innovation in South Africa, it begins with a mindset shift, where healthcare’s value is understood comprehensively and innovation is rewarded appropriately. Today, payers might evaluate medicine costs separately from hospitalization, creating fragmented decisions. By viewing the system holistically, especially under a single-payer model, we can see where innovation adds value, drive efficiencies, and co-create solutions from the start—aligning, and designing collaboratively for meaningful, sustainable benefits.”*

A concrete example of innovation translating into access comes from oncology. *“We enrolled 50 patients in an innovative lung-cancer program that was only a dream a year ago,”* says **Deepak Arora**, Country President, African Cluster, AstraZeneca. *“We launched 52 products across sub-Saharan Africa in three years and prepare physicians with guidelines and protocols before introducing them. Adding AI will make this work more efficient and cost-effective.”* The lesson is practical: when financing support, clinical guidance, and readiness come together, products become accessible.



Unjani Clinics: A Model for Access in Healthcare

Unjani Clinics is a nurse-led social franchise in South Africa that empowers Black women nurses to own and operate affordable primary-care clinics in underserved communities, targeting the “employed but uninsured” and complementing public services.

“Patients should have the option to choose where they receive care. Today, approximately 90% of our clinics are located in rural settings, and this will remain our focus as we work toward establishing 600 clinics. The dream is to have an Unjani Clinic in every community, standing alongside government facilities to share the load. A key to success is the role of the nurse. Nurses identify the communities they want to serve, conducting community surveys to secure buy-in and confirm support. In healthcare, the need and demand are even greater than they were at the beginning of this year. So, we need to step up and meet that need.” **Lynda Toussaint**, CEO, Unjani Clinics NPC.



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THE MEDTECH MASTERPLAN: FROM IMPORT TO LOCAL INDUSTRY



South Africa's MedTech MasterPlan "tackles our heavy reliance on imported technologies for hospitals and clinics. The dtic coordinates the economic cluster with business and labor, while procurement remains with the National Department of Health and the provinces. The aim is market optimization: not import replacement, but leveraging public expenditure and existing industrial capabilities to scale local production and grow exports under the AfCFTA." explains **Dr Tebogo Makube, Chief Director for Industrial Procurement and Development at the dtic.**

"We must ensure that we become more self sufficient in the production of medtech implements and devices" However, none of this works without credible execution, knows **Victor van Vuuren**, Project Manager for the MedTech Master Plan. The plan calls for a multi-stakeholder steering committee with clear targets, parallel workstreams, and accountability. Payment reliability is the bedrock for trust and investment. *"The government debt is a huge elephant in the room that could be a stumbling block."*

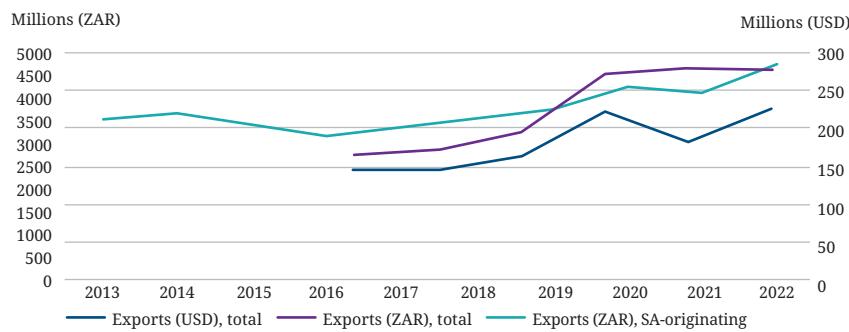
Therefore, this plan rests on mutually reinforcing pillars. First is regulatory reform that reflects how devices actually work and move through their life cycle.



"Our priority is to deepen our relationship with SAHPRA and ensure regulations are fit for purpose, robust, and harmonized," states **Tanya Vogt, Executive Officer at SAMED.** "We have raised concerns

about definitions. With devices assembled locally from hundreds of globally sourced components, we need clarity so policies support local industry without harming access. We also want the essential equipment list and health technology assessment to reflect our sector."

EXPORTS OF MEDTECHS FROM SOUTH AFRICA, 2013-2022



Source: UN COMTRADE (USD data); SARS customs (ZAR data)



Structural Change with Global Impact BD

South Africa is undergoing major transformation in 2025 integrating legal entities, launching a new SAP4H Enterprise Resource Planning (ERP) system, and streamlining operations. As the first EMEA country to go live, South Africa sets the standard for BD's global rollout.

BD Africa 2025

Transforming Healthcare at the Source

Deep Roots, Future Focus

With 30 years in South Africa, BD continues to invest in public health. Leading in TB diagnostics and is aligning with Africa's localisation and regulatory harmonisation efforts.

MedTech as a Career Destination

BD is positioning MedTech as a tech-forward, purpose-driven career path for African talent. The company's shift to a pure-play MedTech model reflects this strategic direction.

Data-Driven Customer Engagement

From data cleanup to digital tools, BD is transforming how it connects with

customers tailoring engagement across clinical, financial, and operational decision-makers.

Integrated Care in Action

In Kenya, BD's partnership with Mama Lucy Hospital showcases a new care model: self-sampling HPV kits, risk-based screening, and stigma-free access to women's health services.

A Legacy of Impact

As Ian Wakefield puts it, "Africa is Gemba the place of action." BD's legacy is not just about products but about solving real healthcare challenges and building systems that serve patients better.



Second is market growth through smarter procurement and export orientation. Predictable demand signals allow companies to invest with confidence, while regional scale helps justify new tooling and lines.



"We are investing in partnerships, infrastructure, and talent to expand access to medical innovation across Africa," explains **Tarek El Rahbani**, Senior Regional Director for the Middle East and Africa at Boston Scientific. *"South Africa is particularly strategic; it is our second-largest market in the MENA region and a launchpad for broader Sub-Saharan engagement."*



Dr Allan Pamba, Executive Vice President at Roche Diagnostics Africa illustrates his company's clear roadmap for Africa's medtech success: *"We have focused on three pillars:*

"Build a strong foundation in Africa through diagnostics infrastructure and networks. Drive access via policy and partnerships. Pursue innovative business models that make diagnostics more accessible in a sustainable way."



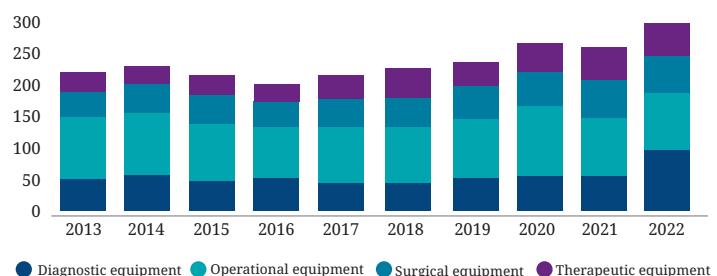
Global players even see Africa shaping how products are designed and used. *"Now is the right time to invest and contribute to Africa's transformation,"* says **Majid Kaddoumi**, Senior Vice President and President for EMEA and APAC at Medtronic. *"The opportunity is not just bringing innovation into Africa. There is a chance for innovation to flow outward from Africa to the world. Devices that can be used by frontline workers in low resource settings have the power to dramatically expand care. By embracing both ends of the spectrum, cutting edge and simplified, we can expand access and improve outcomes for millions."*



"The MedTech Master Plan presents a strong and forward-looking vision to 2035," sustains **Mia de Lange**, General Manager at Guerbet South Africa. *"Local manufacturing is a key opportunity. If we expand local manufacturing, strengthen export capacity, and build a solid production base, the impact on revenue and employment would be substantial. We are talking about thousands of jobs."*

MEDICAL TECHNOLOGY MASTER PLAN

Millions (USD)



Diagnostic equipment Operational equipment Surgical equipment Therapeutic equipment

Backed up by the industry voices, for **Victor van Vuuren** near-term actions are concrete: pass standalone medtech legislation, map imports to local capacity, revise tender scoring to reward local value, after sales service and certified quality alongside price, offer R&D and tooling incentives, and build a shared data platform for buyers, regulators and manufacturers.



By getting these pieces right, South Africa can shift from its high import reliance to a balanced portfolio that protects patients, builds skills and jobs, and positions the country as a regional medtech hub.

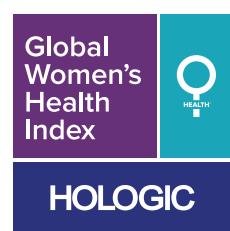
"For me, 2025 will be a year of change, focus, and prioritization, supported by the South African MedTech Master Plan. Localization is beneficial, but not every medtech product can be localized. We should prioritize key products Africa can produce, backed by industrialization, skilled teams—engineers, manufacturing experts, pharmacists—and effective regulation." **Ian Wakefield** - General Manager Africa, BD



Pathways to a Healthy Future for Women

Hologic launched the Hologic Global Women's Health Index — a multiyear, comprehensive global survey about women's health — to help fill a critical gap in what is known about the health and wellbeing of the world's women and girls.

Learn more at: womenshealthindex.com



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At **Organon**, we are committed to advancing the complete health of women by bringing forward new innovations, improving choice and expanding access to health care solutions which help address therapeutic gaps in women's health and ultimately improve the lives of women globally.



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HER HEALTH: THE UNTAPPED DIVIDEND



Women's health is central to Africa's social and economic progress. Ramy Koussa, Lead, Organon META, puts the equity gap plainly: "Women make up 50% of the population, yet their health needs have been overlooked for far too long. A healthy woman supports a healthy family, and a healthy family builds a strong society." However, "Only 4% of healthcare investment is directed solely to women. That inequity is what we are determined to change." For Organon, access grows through ecosystems. "Sustainable access starts with education, partnerships, and trust." Their current contraception program aims to prevent 120 million unintended pregnancies by 2030, each one represents "a woman gaining control over her future."



For Hologic, the bridge between evidence and action is explicit. Nyawira Njeru, Regional Director, Hologic Africa, ties data to policy and financing. "You cannot treat what you do not know. Diagnostics are the backbone of any strong health system." Hologic's **Global Women's Health Index**, is an annual survey that captures how women and girls actually experience health. It measures five dimensions that shape outcomes across a lifetime: preventive care, emotional health, opinions of health and safety, basic needs, and individual health. Because the Index is updated annually and built from women's own responses, it surfaces gaps faster than traditional datasets. It shows where screening and vaccination lag, where women feel unsafe seeking care, and where basic needs such as transport or food security block access. Governments and partners can then target funding, redesign benefits, or adjust primary care pathways with evidence that reflects women's voices. In Africa, the Index helps track progress on cervical cancer screening, integration with HIV programs, and perception-based barriers that depress uptake, turning lived experience into policy action. "As we celebrate Hologic's journey in Africa, we celebrate 14 million lives impacted, and a future where African women can access the best care for every stage of life," Njeru notes.



Mia de Lange, General Manager, Guerbet South Africa, sets her case for early detection. "Each year, approximately 1.7

million women in South Africa are diagnosed—not just with breast cancer, but also with cancers of the female genital tract. Together, these account for nearly 1% of all deaths in the country. When detected early, treatment is faster, less complex, and recovery can be complete." She argues that better diagnostic data makes the economics undeniable, since the cost of late stage care is far higher than early screening. The ripple effects are societal, because when a woman's health is compromised, families, communities, and local economies absorb the shock.

A frontline pathway shows what this looks like in day-to-day care. Ian Wakefield, BD Africa, describes the model at Mama Lucy Hospital in Nairobi. "We created an integrated care pathway so a mother bringing her child for immunization can at the same time get HPV screening through self sampling."



The design lowers stigma and captures missed opportunities. It also enables extended genotyping HPV testing, which improves risk stratification for clinicians and provides women with clearer next steps.

Done right, women's health becomes Africa's biggest equity opportunity. By channeling investment into prevention, diagnostics, and agency, countries unlock healthier families, higher workforce participation, and more resilient budgets. The result is not just better care for women, but a fairer growth model where prosperity is shared more widely across communities.

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SHOTS OF STRATEGY: THE VACCINE PLAYBOOKS



Across Africa, a quiet industrial revolution is underway, as the continent is redefining its place in global health; moving from vaccine recipient to producer and from fragmented manufacturing to coordinated capability.



For **Petro Terblanche**, CEO of **Afrigen Biologics**, 2025 marks a historic inflection point: *"This is our GMP certification year. We're on track to obtain the license that will enable us to conduct end-to-end operations — from discovery and development through scale-up, preclinical development, and GMP manufacturing, all under a SAHPRA 22C license. This supports filing for an IND or CTA and includes an end-to-end manufacturing process from drug substance to fill-finish in vials ready for human use."*

Afrigen's work embodies the new "Africa for Africa" science diplomacy, a movement focused on building **local production capacity to meet regional health needs**, reducing dependency on imported vaccines and ensuring that innovation, manufacturing, and access are all rooted in the continent itself.

"The mRNA TT Programme is the largest tech-transfer program in the history of any product, not just vaccines — platform technology transfer to 15 partners on four continents, representing three billion people to contribute to a better-prepared global South." Three of those partners (Biovac, Institut Pasteur Dakar, and Institut Pasteur Tunis) are already producing results.

"To my knowledge, Afrigen is the only African company that has transferred vaccine technology to other African companies," Terblanche adds.

While Afrigen builds scientific independence, **Sanofi South Africa** demonstrates what sustainable localization looks like in practice. Its partnership with **Biovac** has already turned a 15-year investment into one of the few fully realized vaccine tech-transfer success stories on the continent.



"It was around fifteen years ago that we started with Biovac," recalls **Jean-Baptiste Brégeon**, Sanofi's Country Lead. *"South Africa has successfully completed a tech transfer for a state-of-the-art vaccine — the same one used in the U.S. and Europe. The vaccine is produced locally and delivered to all the babies in the public sector."* Sanofi now aims to expand from self-reliance to regional reach.



"Right now, much of the manufacturing is for other companies' products. The conversation needs to shift toward how we can manufacture our own African-made products. That is where the focus should move in the coming years." **Dr Morena Makhoana**, CEO, South Africa, Biovac

•
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 science to improve
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 •

"Under the Africa for Africa initiative, we want South Africa to be one of the first countries to export locally produced injectable polio vaccines for UNICEF tenders," says **Brégeon**. *"Who is better positioned than South Africa to export more on the Africa for Africa ambition?"*

But scaling requires political consistency. *"The President has signed the Public Procurement Bill. Now, it needs to be translated into actual policies and actions."* he warns.



For **Dr Tebogo Makube**, Chief Director of Industrial Procurement and Development at the **dtic**, that translation is already underway. *"In South Africa, government spending on goods and services exceeds a trillion rand,"* he notes. *"Since 2011, we've designated pharmaceutical products for local production, including antiretrovirals and family-planning medicines. With the new Public Procurement Act, we will continue designating products for local manufacturing and aim to attract API investments."*

Makube views health not as cost but as catalyst. *"We see the disease burden as a challenge and a chance to develop our capabilities. We must address our health challenges to resolve the poverty challenges we face."*



While local firms strengthen supply, **MSD's** work ensures demand keeps pace. Over five years as Managing Director for South and Sub-Saharan Africa, **Zwelethu Bashman** has made access and women's health cornerstones of the company's strategy.

"We have achieved notable progress in increasing HPV vaccination rates, now reaching approximately 17 million girls annually through 30 programs continent-wide. Our HPV immunization program launch in Nigeria was highly successful, and we are preparing new programs in Ghana and Namibia. These efforts reflect our ongoing commitment to cancer prevention through vaccination."

Together, these efforts form a **continental blueprint** for vaccines, based on science that originates locally, manufacturing that scales regionally, policy that sustains it, and access strategies that ensure no one is left behind.

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GROWTH IN AFRICA: ACQUISITIONS, GREENFIELDS, AND CONSOLIDATION

Africa's health economy is expanding beyond vaccines and pharmaceuticals, driven by bold new business models that blend local entrepreneurship, industrial capability, and strategic partnerships.



Angelo Swartz, Chief Executive Officer of **SPAR South Africa**, sees the company's role as empowering independents through scale: "Our growth strategy is to find new industries where independent players need the support of a powerful brand to compete with larger, listed companies. We believe

strongly that by uniting them under one brand, we give them the strength to compete with big retail chains. Supporting entrepreneurs is a core principle for us, and 'Health' is becoming increasingly important for our future."

Through SPAR Health, the group has expanded into primary care delivery, including clinics, specialty medicines, and training programs.

"We want to double the number of pharmacies under our banner, especially in smaller rural towns where access to primary healthcare is limited or unaffordable in the private sector," **Swartz** adds. "Nearly half of all pharmacy assistants in South Africa are certified through our program, which makes us a key contributor to skills development in the sector."



For **Philippe Franiatte**, Chief Executive Officer of **CFAO Healthcare South Africa**, growth lies in integration across the pharmaceutical value chain. Following the acquisition of Sanofi's Opella operations, CFAO built a platform offering turnkey market access, from regulatory support to local manufacturing and distribution.

"Our vision is to establish the leading pharmaceutical distribution company across Africa, fully integrated along the value chain," says Franiatte. "Our goal is to provide pharmaceutical companies with the support they need in Africa — whether that's contract manufacturing, market authorization holding, or medical promotion through our strategic partner, Ethica."

Operating in **38 countries** and employing **22,000 people**, CFAO combines scale with local expertise. "Many global pharma companies find it difficult to allocate capital and resources to Africa," he notes. "Our approach offers them a more efficient and reliable way to distribute their medicines across the continent."



Meanwhile, **Dr Mogologo Phooko**, CEO of **Kalapeng Pharmacies**, illustrates how consolidation and digital transformation are reshaping pharmacy networks.

"We are in the process of acquiring a large medical scheme company as a new client, and we have recently completed an acquisition to add 13 new pharmacies to our network," he says. "We are small enough to care but big enough to deliver. Our ability to tailor solutions to each client is what sets us apart." From acquisitions to courier pharmacy innovation, Kalapeng's expansion reflects the same ambition seen across Africa's health sector: **scale built on purpose**.



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