

Healthcare Market Study

United Arab Emirates

June 2025



HEALTHCARE SYSTEM

UAE Healthcare Market

Market Segment	Medical Care	Health Insurance	Pharmaceuticals	Medical Devices and Supplies	Diagnos-tics	Other
Segment Size and Share, Based on 2024 Results	USD 15.6 billion (47%)	USD 6.7 billion (20%)	USD 4.7 billion (14%)	USD 3.9 billion (12%)	USD 1.6 billion (5%)	USD 0.8 billion (3%)
Expected CAGR 2025-2029	8%	6%	8%	11%	7%	20%
Segment Structure	<ul style="list-style-type: none">Outpatient care (51%)Inpatient care (49%)	Health insurance (100%)	<ul style="list-style-type: none">Medicines (51%)Active pharmaceutical ingredients (APIs) and intermediates (49%)	<ul style="list-style-type: none">Equipment and instruments (53%)Consumables (27%)Implants and stents (15%)Patient care products (4%)	Diagnos-tics (100%)	<ul style="list-style-type: none">Medical technologies (76%)Fitness and wellness (24%)

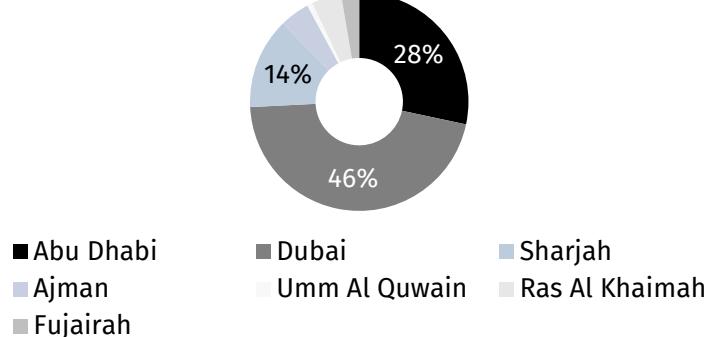
The UAE healthcare ecosystem is valued at 34 billion USD in 2024 and is expected to grow at a compound annual growth rate of around 8% over the next five years.

Medical care constitutes the largest portion of the UAE's healthcare ecosystem, accounting for 47% of the total market. This segment is roughly evenly split between inpatient and outpatient care. The national health insurance sector makes up another 20% of the market.

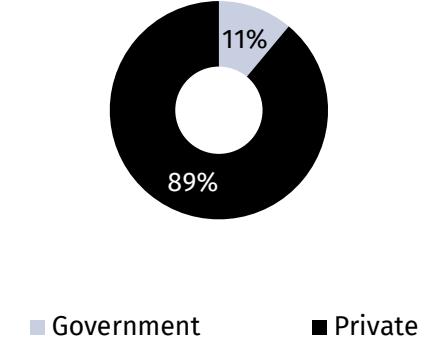
Other important components of the ecosystem include pharmaceuticals as well as medical devices and supplies. The latter is projected to grow at a CAGR of approximately 11% until 2029. Data also indicate that other smaller segments—such as fitness, wellness, and medical technology—are expected to show high growth rates.

STATISTICS OF MEDICAL CENTERS

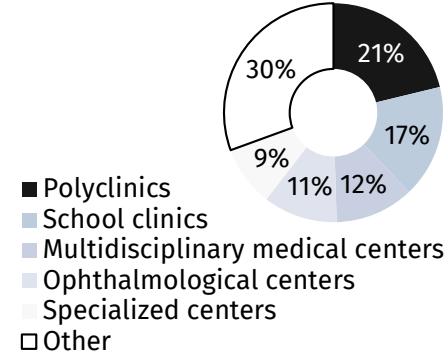
Breakdown of medical centers, by emirate



Breakdown of medical centers, by sector



Breakdown of medical centers, by type



Number of medical centers (at the end of the period), units

5 380

5 369

5 467

5 770

7 029

7 178

2019

2020

2021

2022

2023

2024 (est.)

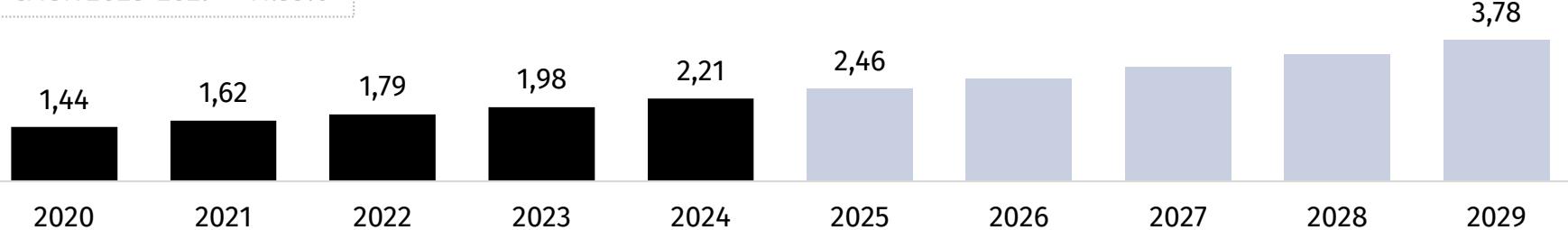
By the end of 2024, the number of medical centers in the UAE exceeded 7,000 institutions. A significant increase in the number of medical centers was observed in 2023. The main growth occurred in private centers in the emirates of Dubai (an increase from 2.3 thousand to 3.1 thousand), Abu Dhabi (from 1.3 thousand to 1.5 thousand), and Sharjah (from 0.76 thousand to 0.87 thousand). The growth drivers were segments such as ophthalmology clinics, polyclinics, and school clinics.

Source: UAE Ministry of Health and Prevention

OUTPATIENT SERVICES MARKET

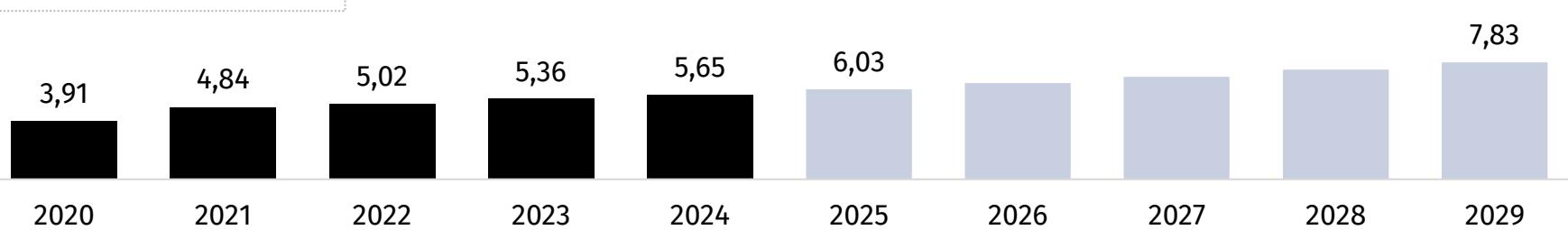
CAGR 2025-2029 – 11.33%

Volume of outpatient services*, billion USD



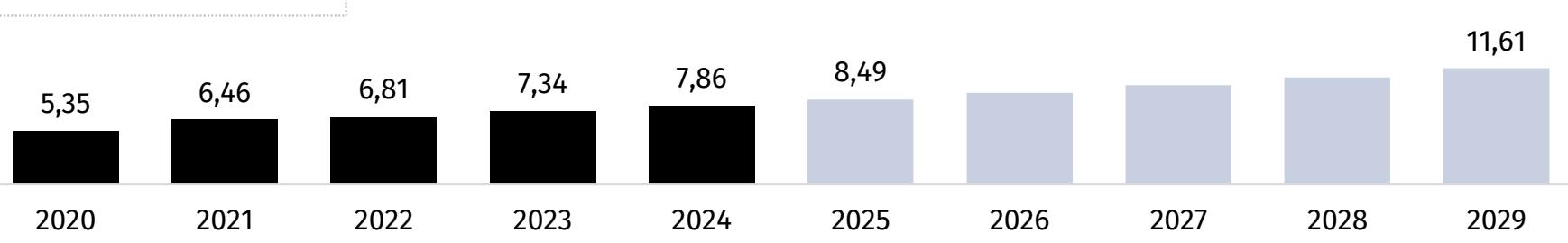
CAGR 2025-2029 – 6.75%

Volume of outpatient services**, billion USD



CAGR 2025-2029 – 8.14%

Total volume of outpatient services, billion USD



* includes outpatient care in hospitals, minor surgical procedures, visits to emergency departments (not associated with inpatient treatment)

** includes outpatient medical services outside hospitals, including dental practice and home medical care services

SEGMENTS OF LABORATORY SERVICES AND REHABILITATION CENTERS

The clinical laboratory services market in the UAE was valued at USD 1.2 billion in 2024. It is projected to grow at a compound annual growth rate (CAGR) of 7.9% between 2025 and 2034, reaching a market size of over USD 2.5 billion by 2034.

The primary drivers underpinning this growth include the increasing prevalence of chronic diseases such as diabetes, cardiovascular conditions, and cancer, which are linked to sedentary lifestyles and an aging population. These conditions heighten the demand for early diagnostics and ongoing monitoring through advanced laboratory testing. Additionally, cutting-edge technologies—such as artificial intelligence-enabled diagnostics and molecular testing—are transforming laboratory operations by improving diagnostic accuracy, speed, and overall efficiency.

The outpatient rehabilitation centers market in the UAE generated revenues of USD 812.9 million in 2022 and is expected to reach USD 1,433.3 million by 2030.

The market is forecast to grow at a CAGR of 7.3% from 2023 to 2030. Within this segment, physiotherapy accounted for the highest revenue share in 2022, while behavioral therapy emerged as the most profitable and fastest-growing type of therapy over the forecast period. Growth in the global rehabilitation market is expected to be driven by several key factors, such as rising incidence of substance abuse, increasing prevalence of chronic diseases, advancements in patient care, and growing demand for therapy services.

TRENDS IN THE UAE OUTPATIENT SERVICES MARKET

- 1 The outpatient medical services market in the UAE demonstrates steady growth amid increasing demand from patients, technological innovations, and efforts to improve healthcare accessibility.
- 2 Consumers are increasingly preferring personalized and convenient services, including telemedicine and mobile applications for booking and health monitoring.
- 3 The market receives an additional boost from cultural diversity, government support for telehealth, and the country's drive to develop as a center for medical tourism.
- 4 Patients are paying more attention to preventive medical services, which has led healthcare institutions to offer wellness programs and regular medical check-ups.
- 5 There is a growing preference for comprehensive medical solutions aimed at restoring both physical and mental well-being, reflecting a cultural shift toward holistic approaches to health.

MEDICAL CENTERS



OXFORD MEDICAL CENTER

A medical center located in the Bur Dubai district, offering a wide range of services. It consists of 11 medical departments, including a pharmaceutical department that assists patients with medication selection and dispensing.

Location: Dubai



MEDCARE

A network of medical institutions that includes hospitals, clinics, and medical centers. It encompasses approximately 20 medical centers providing a broad spectrum of medical services. MEDCARE is part of Aster DM Healthcare Group—a global medical network with around 317 healthcare facilities across 9 countries, including Gulf countries, Africa, and India.

Locations: Dubai, Sharjah



CANADIAN Medical Center

A multidisciplinary medical center with its main branch in Abu Dhabi. The center offers services in more than 30 specialties, combining advanced technologies, international treatment standards, and highly qualified medical staff.

Locations: Abu Dhabi, Dubai, Sharjah

MEDICAL CENTERS



American Wellness Centre

A private multidisciplinary medical center located in Dubai Healthcare City (DHCC). Initially specialized in mental health services, it has since become one of the leading psychiatry and psychology centers in the region. The center also offers services in cardiology, dentistry, obstetrics and gynecology, and more.

Location: Dubai



Capital Health Screening Center

A network of specialized medical centers in Abu Dhabi, Al Ain, and Al Dhannah, providing diagnostic screening services. The network partners with M42, a global healthcare technology company delivering innovative medical diagnostics solutions that ensure highly accurate test results. The center offers packages for individual clients (including visa medical examinations) and corporate clients (group employee screenings).

Location: Abu Dhabi



Prime Medical Center

A network comprising a hospital and over 20 multidisciplinary medical centers, founded in 1999 by a UAE citizen. Most medical centers are located within Dubai, with additional facilities in Ajman and Sharjah.

Locations: Dubai, Sharjah, Ajman

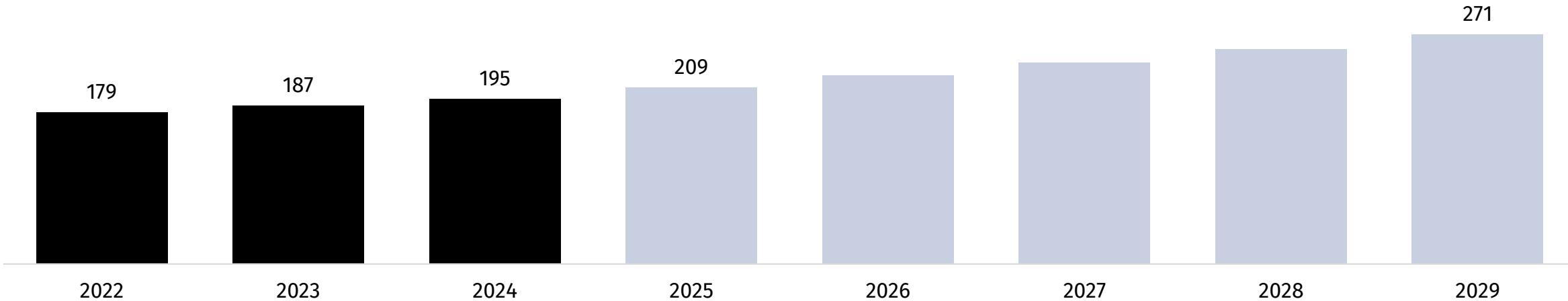
MEDICAL CENTERS

Medical Center/Network	Number of Facilities in the UAE	Number of Doctors	Year Founded	Services Provided
Oxford Medical Center	1	11+	1978	General therapy, dentistry, pediatrics, gynecology, ophthalmology, cardiology, orthopedics, dermatology, endocrinology
Medcare	20	500+	1987	Surgery, therapy, neurology, pediatrics, rehabilitation, dentistry, diagnostics, emergency medicine
Canadian Medical Center	7	46+	2006	Therapy, surgery, women's health, rehabilitation, psychiatry, dermatology, dentistry, alternative medicine, dietology
Capital Health Screening Center	4	200+	before 2019	Visa medical examinations, vaccination, employee health screenings, laboratory tests, instrumental diagnostics, preventive screenings
American Wellness Center	1	40+	2016	Therapy, rehabilitation, mental health, home care, medical tourism
Prime Medical Center	25	300+	1999	Therapy, surgery, women's health, pediatrics, diagnostics, rehabilitation, psychiatry, dermatology, dentistry, other medical services

DENTAL SERVICES MARKET

CAGR 2025-2029 – 6.8%

Dental services market size, million USD



The dental services market in the UAE is experiencing rapid growth driven by factors such as population growth, increasing disposable incomes, and rising awareness of oral health. The market is expected to continue its upward trajectory in the coming years, supported by growing attention to preventive care, increasing popularity of cosmetic dentistry, and expanding insurance coverage for dental procedures. Additionally, government initiatives aimed at promoting oral health and increasing the number of practicing dentists in the country are expected to further boost the market. The market is also characterized by a high level of competition among medical centers.

Source: TechSci Research

DENTAL CLINICS



CROSSROADS DENTAL CLINIC

A dental clinic providing services including dental implants, teeth whitening, prevention of dental diseases, and more. The clinic offers both general and local anesthesia options during dental treatments, and more.

Location: Dubai



VISION Dental Clinic

A dental clinic primarily focused on aesthetic dentistry, also offering dental surgery, implants, and orthodontics. The clinic is owned by a UAE national.

Location: Abu Dhabi



SameDay DENTAL CLINIC

Specializing in dental implants, this clinic offers a full range of dental services. Its methodologies are based on the scientific principles of osseointegration developed by Professor Per-Ingvar Bränemark, a pioneer in implantology and founder of the first specialized implantology center in Sweden (1989).

Location: Dubai

DENTAL CLINICS

Medical Center/Network	Number of Facilities in the UAE	Number of Doctors	Year Founded	Services Provided
CROSSROADS DENTAL CLINIC	2	11-50	2014	Aesthetic dentistry, pediatric dentistry, orthodontics, endodontics, maxillofacial surgery, prosthodontics, periodontics, sedation dentistry.
VISION Dental Clinic	1	11-50	2016	Aesthetic dentistry, implants, dental surgery, orthodontics (braces).
SameDay DENTAL IMPLANTS	1	11-50	2013	Wide range of dental implants, aesthetic dentistry (whitening, veneers, etc.), orthodontics, consultations, and more.
Dr Joy Dental Clinic	12	201-500	2004	Aesthetic dentistry, orthodontics, sedation dentistry, root canal treatment, wisdom tooth extraction, pediatric dentistry, preventive care, and more.
Dr. Michael's Dental Clinic	5	51-200	1997	General dental services (professional cleaning, fillings, tooth extraction, disease prevention), cosmetic dentistry, orthodontics, gum treatment, implants, pediatric dentistry, and more.
DentisTree Dental Clinic	3	11-50	2020	Aesthetic dentistry, orthodontics, implants, gum treatment, pediatric dentistry, treatment of jaw joints.

MEDICAL TOURISM – GENERAL INFORMATION

Medical tourism is one of the key factors behind the UAE's strong appeal to international visitors. The country welcomes over 600,000 medical tourists annually.

According to CMI estimates, **the UAE medical tourism market is expected to grow at a compound annual growth rate (CAGR) of 8.70% from 2024 to 2033. The market is projected to reach USD 1,085.58 million in 2024** (up from USD 998.69 million in 2023) and **expand to approximately USD 2.3 billion by 2033.**

A total of 225 leading hospitals in the UAE hold international accreditation from the Joint Commission International (JCI), a globally recognized healthcare quality standard.

Several hospitals in the UAE specialize in robotic surgery, cancer treatment, and infertility therapy. Some facilities offer innovative treatments not widely available elsewhere, such as 3D-printed joints for orthopedic surgery.

The UAE government actively promotes medical tourism through various initiatives and strategic policies. For example, the Dubai Health Experience (DXH) platform provides a unified portal for medical tourists, offering information on medical packages, visas, travel arrangements, and accommodation. Government-supported programs like DXH deliver comprehensive medical packages that include treatment, lodging, and wellness services. Furthermore, the UAE Vision 2030 emphasizes strengthening the healthcare sector by expanding private sector participation and boosting investment in research and development.

The UAE is renowned for a range of medical procedures. Some of the most in-demand treatments include:

- **Cosmetic surgery:** The UAE offers a wide variety of cosmetic procedures, from facelifts to rhinoplasty and liposuction.

- **Orthopedic surgery:** Knee and hip replacement surgeries are commonly performed with a high success rate.

- **Cardiovascular treatment:** Including coronary artery bypass grafting, valve replacement, and angioplasty.

- **Dental care:** High-quality dental services such as implants, veneers, and teeth whitening.

MEDICAL TOURISM – GENERAL INFORMATION

The medical tourism market in the UAE is driven by key cities such as Dubai, Abu Dhabi, and Sharjah, which offer world-class medical facilities, hospitals with international accreditation, and advanced medical technologies.

Dubai

Dubai dominates the UAE medical tourism market, capturing approximately 45% of the total market share. The city leads the sector due to its advanced infrastructure and strong government-backed initiatives.

Abu Dhabi

Abu Dhabi holds about 30% of the UAE's medical tourism market, emerging as a preferred destination for specialized medical treatments in cardiology, oncology, and neurology.

Sharjah

Sharjah accounts for roughly 12% of the medical tourism market in the UAE, providing competitively priced yet high-quality medical services attractive to patients with limited budgets.

Ras Al-Khaimah

With an 8% market share, Ras Al Khaimah is steadily expanding its role within the UAE's medical tourism landscape, particularly in wellness and rehabilitation services. The emirate hosts several specialized medical institutions.

Medical Tourism Index (46 Destinations)

City	Global Ranking	Environment	Medical Tourism Industry	Quality of Facilities & Services
Abu Dhabi	9	15	8	9
Dubai	6	7	13	5

MEDICAL TOURISM – KEY PLAYERS



مدينة الشيخ شخبوط الطبية
Sheikh Shakhbout Medical City



المستشفى الكندي التخصصي
Canadian Specialist Hospital



MEDICAL TOURISM – KEY TAKEAWAYS

The driving forces behind the UAE's medical tourism market are its world-class healthcare infrastructure, internationally accredited hospitals, and government initiatives promoting medical tourism.

Growth in demand for cosmetic surgery, dental treatments, and specialized procedures such as cardiology and orthopedics are key factors propelling industry expansion.

Emerging trends include the integration of wellness tourism, AI-powered diagnostics, and telemedicine services aimed at enhancing patient care quality.

Key market players are broadening the range of their services to attract foreign patients.

Challenges such as the high cost of specialized procedures and regulatory barriers may impact market growth.

Dubai, Abu Dhabi, and Sharjah dominate the UAE's medical tourism sector, offering advanced treatments and high-quality medical services.

MEDICAL TOURISM – OUTLOOK

The UAE medical tourism market is expected to demonstrate steady growth driven by increased investments in healthcare infrastructure and advanced medical technologies.

Dubai and Abu Dhabi will continue to dominate the market, offering specialized treatments and internationally accredited medical facilities.

The integration of artificial intelligence, robotic surgeries, and telemedicine will enhance patient care quality and the efficiency of medical services.

Government initiatives and regulatory reforms will further simplify medical tourism processes, making the UAE more accessible for foreign patients.

Demand for cosmetic, dental, and orthopedic procedures will grow, attracting a diverse patient base from Europe, Africa, and the Middle East.

Wellness tourism will expand, combining traditional treatments with comprehensive healthcare solutions such as physiotherapy and rehabilitation.

Strategic collaboration between healthcare providers and international insurance companies will facilitate seamless access to care for medical tourists.

Digital health solutions, including AI-based diagnostics and electronic medical records, will improve patient management and treatment outcomes.



asercapital.ae



DSO-IFZA, IFZA Properties, Dubai Silicon Oasis
Dubai, UAE



+971 55 417 8477



sales@aser.ae

