Bahrain Industry Report

Healthcare Sector

December 2025

Foreword

We are pleased to present our latest Healthcare Sector report, designed to provide valuable insights for our clients. Our team regularly publishes sector-focused reports, sharing our perspectives on the Healthcare landscape, with a particular emphasis on Bahrain.

Healthcare has always been a key pillar of Bahrain's national development and social well-being. The Kingdom is recognized for its comprehensive and progressive healthcare system, which focuses on—accessibility and quality in medical services.

Bahrain's healthcare infrastructure continues to evolve in line with global advancements, offering modern medical facilities, digital health solutions, and services that meet international standards of patient care. The government actively promotes public-private partnerships to enhance specialized healthcare delivery and foster innovation in areas such as telemedicine, biotechnology, and preventive healthcare.

With a strong regulatory framework, a skilled medical workforce, and a growing demand for—advanced healthcare services, Bahrain presents a highly attractive environment for international investment in the healthcare sector.

We look forward to staying engaged with industry leaders and clients in the region and keeping you informed with relevant insights and sector developments.

20 YEARS IN BAHRAIN AND BEYOND

Grant Thornton Bahrain

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Overview: Healthcare Sector in Bahrain

Bahrain has a universal healthcare system under which healthcare is free of charge for Bahraini citizens at government hospitals and health centres across all governorates, and available for a nominal fee for non-Bahrainis.

Bahrain's public healthcare is divided into primary, secondary, and tertiary levels, with primary care provided by health centers offering general services and preventive care, secondary care available through hospitals and specialized clinics for more complex conditions, and tertiary care for highly specialized treatments.

The ongoing rollouts of digital healthcare applications have strengthened Bahrain's position as a regional leader in digital health, with the Digital Government Strategy, National Health Plan 2016–2025, and Economic Vision 2030 remaining key drivers for the sector's future growth.

Sources: BMI, National Health Plan 2016-2025

Government Healthcare Organisations in Bahrain

Ministry of Health ("MoH")

MoH focuses on providing and organizing public healthcare services in Bahrain. It also has an essential role in the issuance of decisions and policies related to health financing.

National Health Regulatory Authority ("NHRA")

NHRA is responsible for implementation and development of healthcare regulations in both government and private sectors. This involves regulatory procedures related to licensing healthcare facilities, including hospitals.

Supreme Health Council ("SHC")

SHC is responsible for drawing up a National Strategy for Health in Bahrain and monitoring its implementation in association with relevant government ministries and institutions.

Salmaniya Medical Complex ("SMC")

SMC is the largest tertiary public hospital in Bahrain with a capacity of over 1,200 beds. The hospital also functions as a teaching and research centre for healthcare professionals in the country.

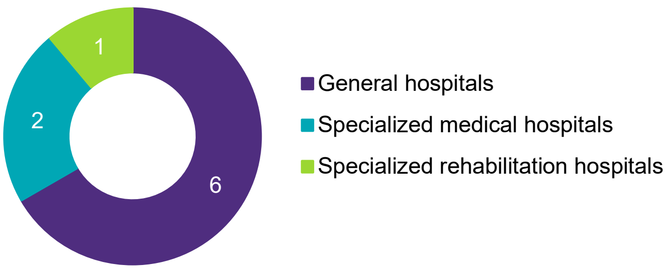
Sources: BMI, National Health Plan 2016-2025

Healthcare Sector in Bahrain: Key data

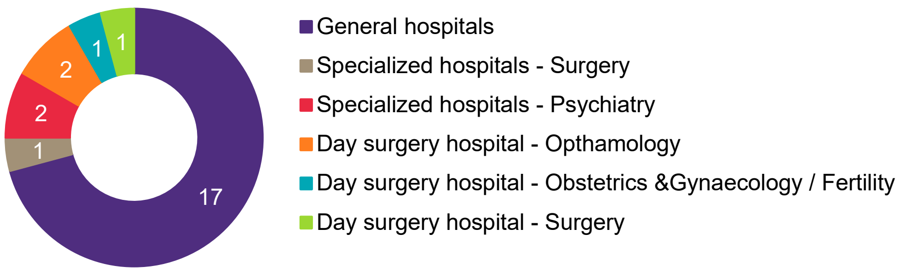
Hospitals

As of 2023, Bahrain had 9 public hospitals and 24 private hospitals. The Kingdom recorded a total of 924 licensed healthcare facilities, comprising 877 private facilities and 47 public facilities. Among the licensed private facilities were 24 hospitals, 329 centers, and 86 clinics.

Number of Public Hospitals by Type, Bahrain



Number of Private Hospitals by Type, Bahrain



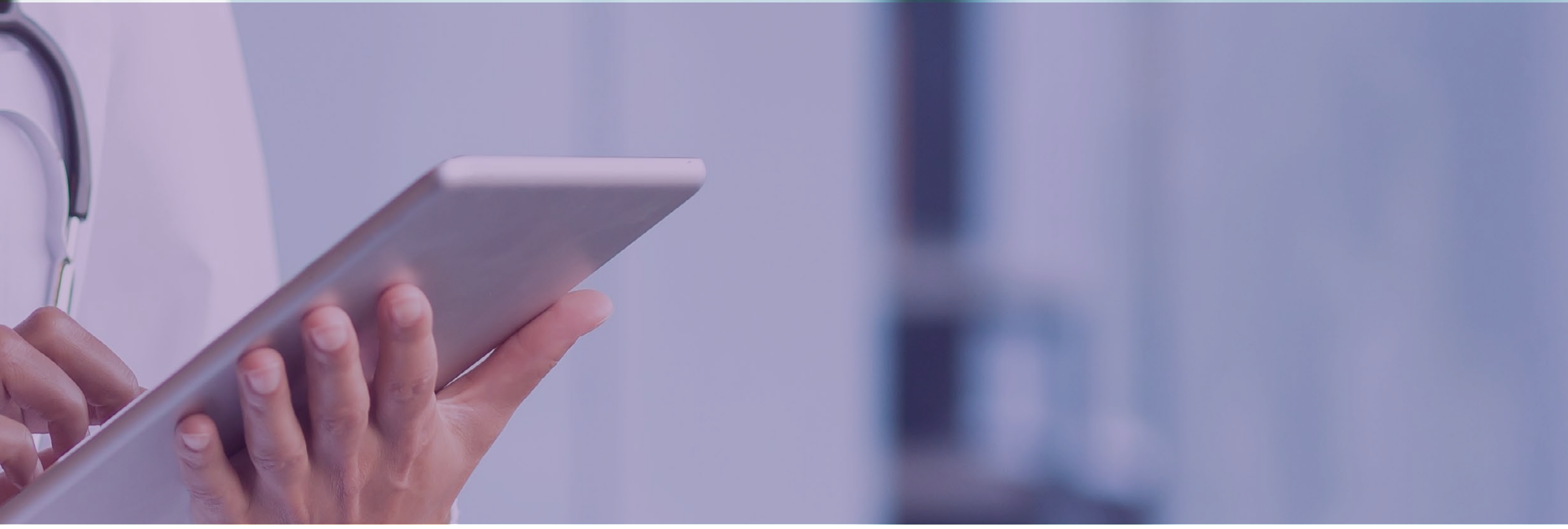
Healthcare Activity

In 2024, total in-patient admissions were 40.8 per 1,000 population and is projected to reach 42.2 per 1,000 by 2029, increasing at a CAGR of 0.7%.

Out-patient visits were 3,234.4 per 1,000 in 2024 which is expected to increase to 3,303.8 per 1,000 by 2029, growing at a CAGR of 0.4%.

Surgical procedures stands at 14.0 per 1,000 in 2024, forecasted to increase to 14.7 per 1,000 by 2029, reflecting a CAGR of 1.1%.

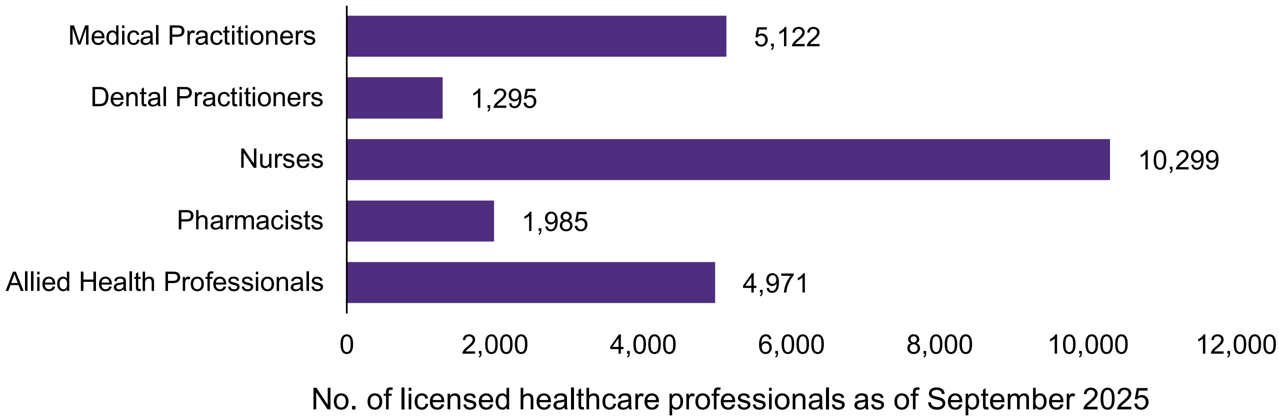
Sources: BMI, MoH, NHRA



Healthcare professionals

The number of physicians per 1,000 population in 2024 was ~2.64 and is expected to increase to ~3.05 by 2030. Similarly, the number of nurses per 1,000 population stood at ~7.86 in 2024 which is forecasted to increase to ~8.25 by 2030.

The licensed healthcare workforce in Bahrain totaled 23,672 professionals as of September 2025.



Sources: BMI, MoH, NHRA

Healthcare Expenditure in Bahrain

Overview

The overall healthcare expenditure in Bahrain encompassing both public and private sectors is projected to increase from BD 722.19 million in 2024 to BD 883.38 million by 2030 at a CAGR of 3.41%, driven by demographic shifts, policy reforms, and economic factors.

Public expenditure is estimated to account for an average of 61% of total healthcare spending over the forecast period, with the remaining 39% attributed to private sector expenditure.

There is an increase in Public-Private Partnerships ("PPPs") in the healthcare sector in Bahrain, creating a marketplace that will continue to offer significant commercial opportunities for the private sector.

Healthcare Spending – GDP Contribution and Per Capita Levels:

Healthcare spending in Bahrain is expected to rise from 4.08% of GDP in 2024 to 4.46% by 2030.

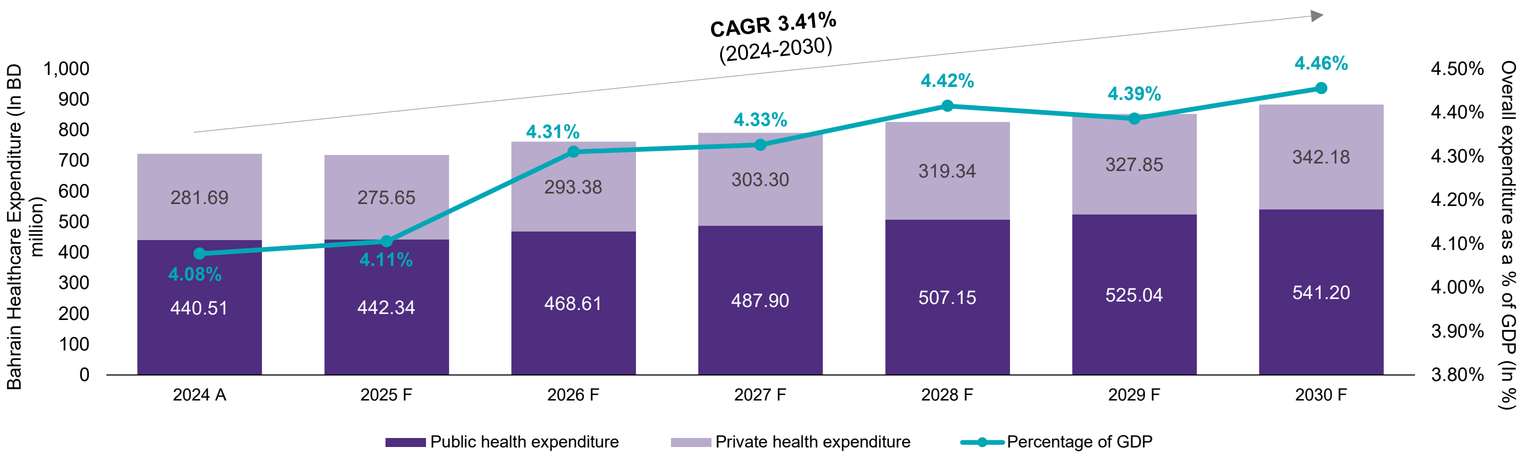
In 2024, health expenditure as a share of GDP in Bahrain was below both emerging market and global medians due to the country's reliance on oil.

Supported by Bahrain's small population, the 2024 health expenditure per capita of BD 483.31 was higher than the emerging market and global medians.

Government spending constitutes a significant share of the national budget, with reforms focused on efficiency and diversification. Allocations to government hospitals, primary healthcare centers, and King Hamad University Hospital account for the majority of the Bahrain healthcare budget

Sources: BMI

Bahrain Healthcare Expenditure in Public and Private Sectors



A = Actual | F = Forecast

Sources: BMI

Growth Drivers and Challenges

Growth drivers

Population Growth and Ageing:
Bahrain's population grew from 711,442 in 2000 to 1.6 million in 2024. While overall growth is expected to remain stable in the coming decades, the rising elderly population will drive demand for chronic care services, creating opportunities for expanded healthcare infrastructure and specialized facilities.

Rising Disease Burden:
Non-communicable diseases ("NCDs") constitutes more than three-quarters of mortality in Bahrain, prompting increased investment in preventive and outpatient services, creating demand for specialized clinics, diagnostic services, and long-term care solutions.

Policy and Insurance Reforms:
The mandatory SEHATI insurance scheme launched in 2023—offering free basic coverage for nationals and employer-sponsored plans for expatriates—is expected to drive growth in pharmaceutical and overall healthcare spending.

Infrastructure and Workforce Expansion:
Investments in personnel and facilities, strengthened by public-private partnerships, are expected to drive advanced rehabilitation centers, expand medical tourism, and enhance workforce development.

Digital Health Innovations:
Bahrain's digital health transformation, driven by the Digital Government Strategy and National Health Plan is boosting demand for telemedicine, electronic health records (I-SEHA), and connected health apps.

Sources: BMI, Nexdigm, Aviaan

Challenges

Supply Dependence and Cost Pressure:
Dependence on imported medical technologies results in high procurement costs creating financial strain on both providers and patients and exposes the healthcare sector to supply chain risks.

Market Size Limitations:
Bahrain's relatively small population limits the cost effectiveness of advanced infrastructure and specialized services. It also results in higher dependence on expatriate healthcare professionals that can lead to language barriers and higher turnover.

Reimbursement and Affordability Issues:
Many expensive foreign-made pharmaceuticals and other medical supplies are excluded from reimbursement plan, potentially burdening patients and limiting access to advanced treatments.

Competition from Regional Hubs:
Neighboring GCC countries like Saudi Arabia and the UAE are rapidly expanding advanced healthcare facilities, attracting patients and skilled medical professionals who might otherwise seek care or employment in Bahrain.

Digital Transformation Challenges:
While Bahrain has made significant progress in digital health, its initiatives face challenges around data protection, which could hinder the full adoption and integration of technologies such as AI and big data.

Sources: BMI, Nexdigm, Aviaan

Competitive Landscape

Name of Healthcare Facility	No. of Beds	Governorate	Location
Government Hospitals			
Salmaniya Medical Complex	1,200	Northern	Salmaniya
BDF Hospital	463	Southern	Riffa
King Hamad University Hospital	410	Muharraq	Busaiteen
Jidhafs Maternity Hospital	100	Capital	Jidhafs
Private Hospitals			
King Hamad American Mission Hospital	125	Capital	Manama, A'Ali, Saar, Amwaj, Riffa
Bahrain Specialist Hospital	101	Capital	Juffair, Muharraq
Royal Bahrain Hospital (part of KIMS Group)	70	Capital	Um Al Hassam, Salmaniya, Muharraq, Askar, Janabiya
Ibn Al Nafees Hospital	45	Capital	Manama
Noor Specialist Hospital	41	Capital	Manama
Al Hilal Hospital	32	Capital, Muharraq, Northern, Southern	Manama, Muharraq, Riffa, Salmabad, Askar, Hamad Town, Hidd, Sitra
Awali Hospital	N/A	Southern	Awali
Al Kindi Hospital	N/A	Capital	Bu Ghazal

Sources: Hospital websites

Glossary

General terms	
~	Approximately
%	Percentage
&	And
AI	Artificial Intelligence
AMH	American Mission Hospital
BD	Bahraini Dinars
BDF	Bahrain Defense Force
BMI	Business Monitor International
BSH	Bahrain Specialist Hospital
CAGR	Compounded Annual Growth Rate
GCC	Gulf Corporation Council
GDP	Gross Domestic Product
KIMS	Kerala Institute of Medical Science
MoH	Ministry of Health
NCDs	Non-Communicable Diseases
NHRA	National Health Regulatory Authority
No.	Number
PPPs	Public-Private Partnerships
SHC	Supreme Health Council
SMC	Salmaniya Medical Complex
UAE	United Arab Emirates

About Us

Our Global Network

A global network of professionals providing audit, tax and advisory services in 150 markets. Whether your business has domestic or international aspirations, Grant Thornton can help you to unlock your potential for growth wherever and whenever needed.

Global Quick Facts

$8.5 billion
in global revenue

80,000+
professionals

150
markets worldwide

Our Global Clients Include

91% of Forbes 100

71% of FORTUNE Global 500

75% of S&P Europe 350

78% of FTSE 100

Who We Are - Grant Thornton Bahrain

160+
Employees

7
Directors and Senior Managers

12
Partners

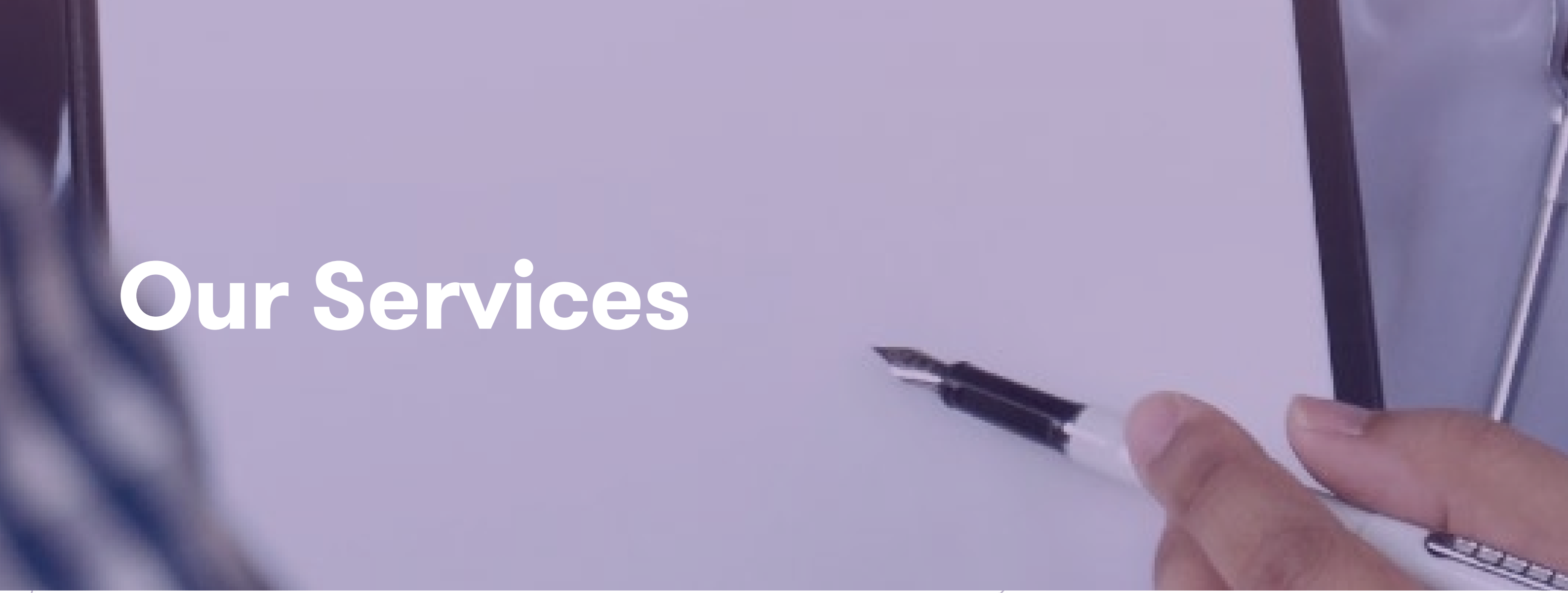
8
Nationalities

50%
Expert Bahraini Workforce

40%
Professional positions held by women

2,000+ Clients Across the Following Industries

- Aviation
- Education
- Energy
- Finance
- FMCG
- Healthcare
- Hospitality & Tourism
- Manufacturing
- Real Estate



Our Services

Audit and Assurance

- Financial statement audits
- Financial statement compilations
- Financial statement reviews
- Agreed-upon-procedures
- Statutory certification for government levy and import duty exemptions
- Implementation and reporting on controls
- Readiness assessment for SoX
- IFRS Advisory

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- Internal audit
- Governance
- Business process improvement
- Forensic investigations
- Data analytics
- Quality assurance review
- Regulatory compliance
- Policies and procedures

Transaction Advisory

- M&A Advisory
- Capital markets
- Valuations
- Debt advisory
- Due diligence
- Business planning
- Feasibility studies

Technology Advisory

- Technology advisory and strategy
- Technology adoption
- Technology effectiveness review
- Information protection and Cyber security
- Asset management
- Policies and procedures
- ISO 27001, ISO 22301 and PCI
- DSS Certification Program
- Knowledge development
- IT Governance and management
- Project management

Business Process Solutions

- Business process outsourcing (BPO)
- Global compliance and reporting solutions (GCRS)
- Shared services
- Bookkeeping and Financial Accounting
- Payroll and personnel administration
- Human Resources Solutions

Tax Advisory

- Impact assessment
- VAT compliance
- Preparation and submission of returns
- VAT Technology advisory
- Country by Country Reporting
- Base Erosion Profit Shifting
- Economic Substance Requirement
- Transfer Pricing
- Proposed Taxes

Corporate and Regulatory Services

- Company formation with MOICT and obtaining CBB Licenses
- Legal document preparation and services thereafter
- Secretarial services for board meetings
- Trademark and Intellectual property registration
- Liquidation of MOICT and CBB licensees
- Regulatory advisory for CBB licensing, IPO and rights issue

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