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ADB

Health

November 2022

Prepared by Health Sector Group Secretariat

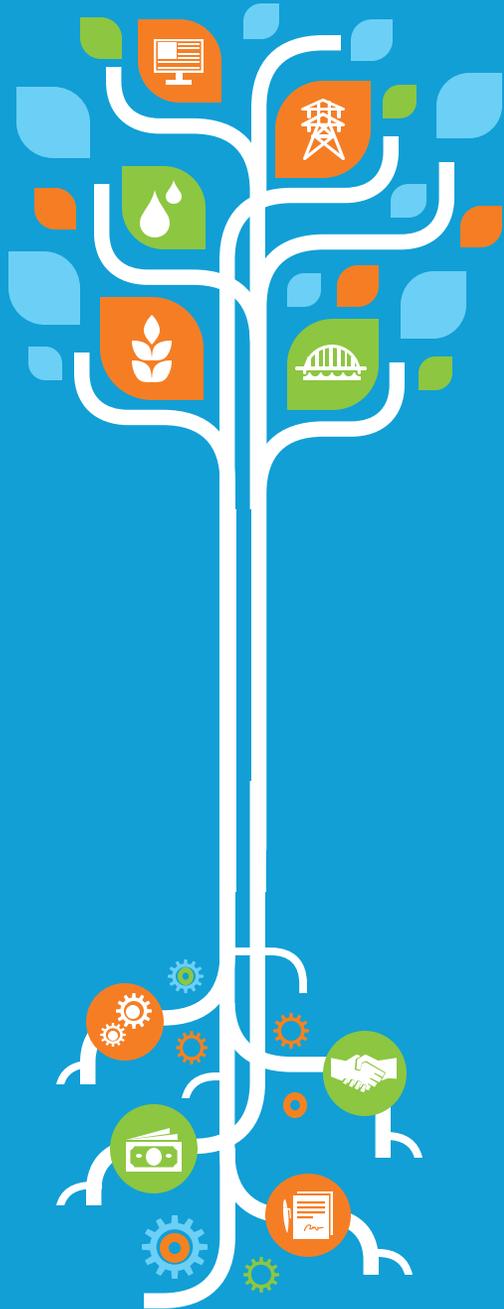
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BUSINESS
OPPORTUNITIES





Major health challenges

Lingering impacts of the pandemic

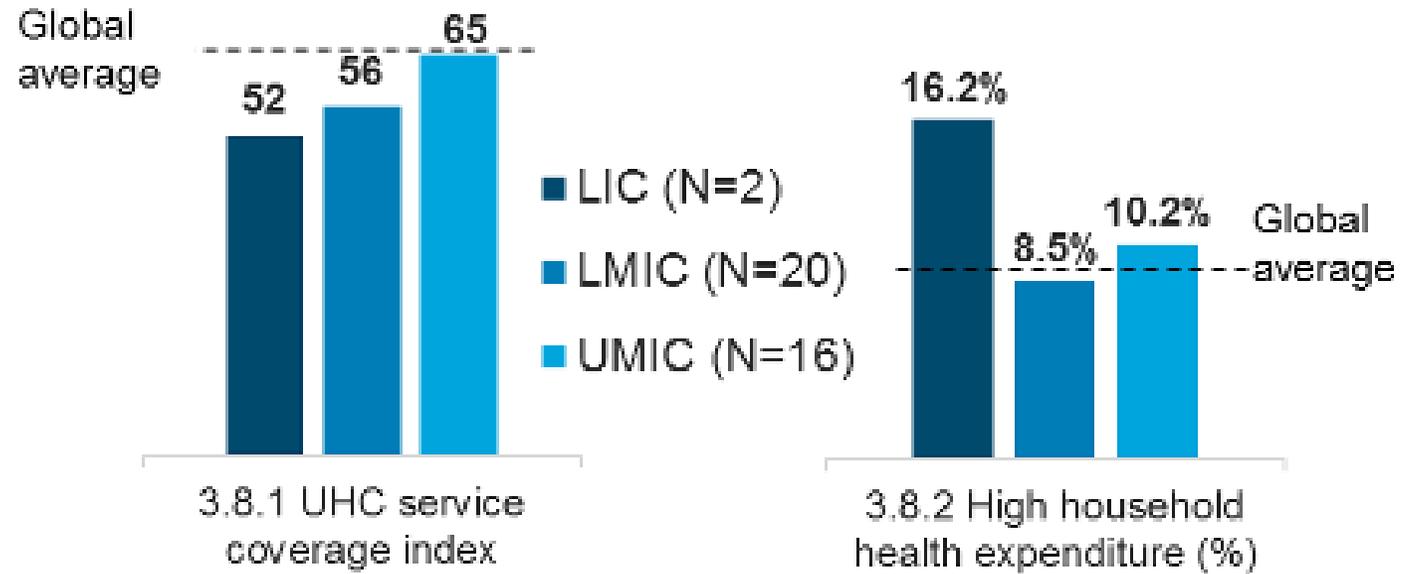
- Demand for and utilization of health systems
- Health system supply issues
- Scaling up lessons learned and applying new innovations
- Long-term pandemic impacts e.g. fiscal effects, restoring trust, health insurance, endemic COVID-19 with persistent needs for vaccines, health workforce



Universal Health Coverage (UHC)

Developing Asia's progress towards UHC was mixed before COVID-19

United Nations Sustainable Development Goal 3: UHC indicators, 2019 ADB Asia and the Pacific DMCs with Operations



Underlying influences on health

Rapid Urbanization & Climate Change

- Air, noise, and water pollution
- Extreme heat events
- Road traffic injuries
- Limited primary health care access

Demographic Trends

- Youth bulge in some DMCs, rapid aging in others
- Increasing NCDs
- Demand for elderly care services rising

Decentralization & Regional Cooperation

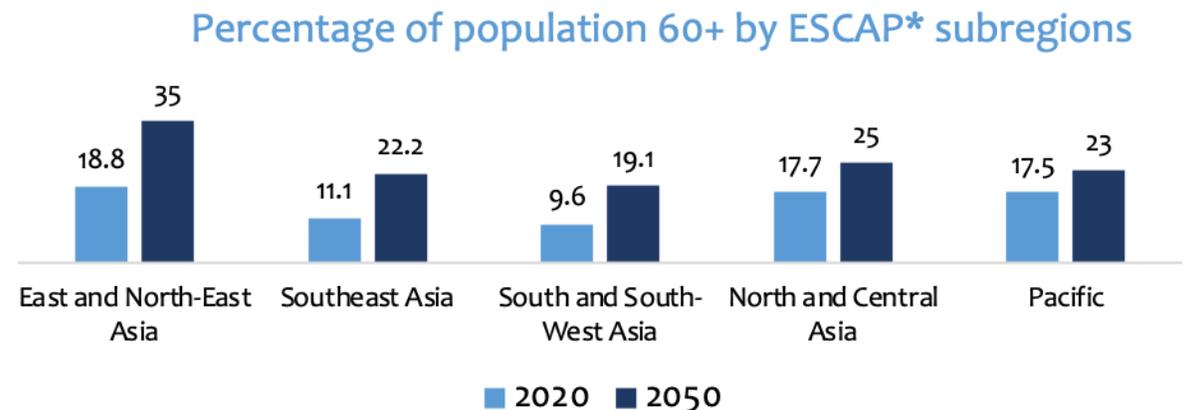
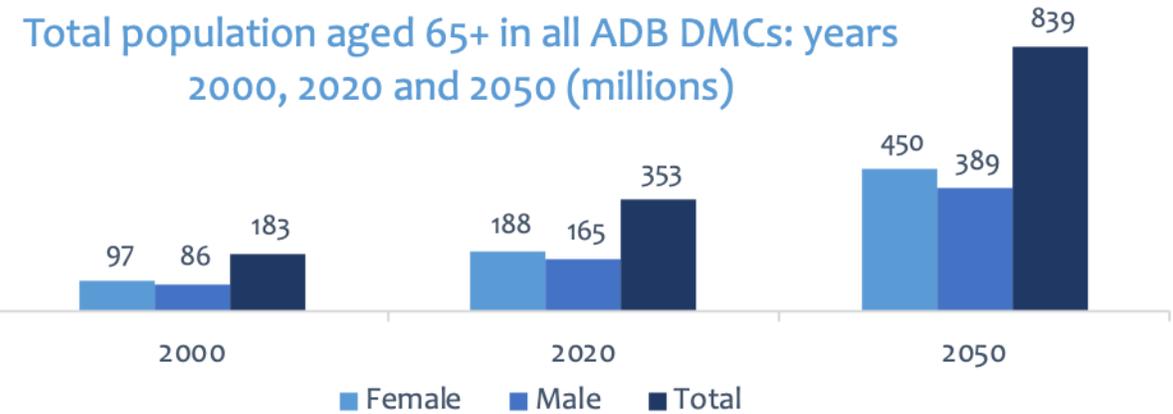
- Limited central resources
- Cross-border risks during health emergencies
- Gaps in information sharing

Digitalization

- Health worker shortage
- Rising health needs burdening existing systems
- Limited access to high quality & convenient health services

Health impact of ageing in Asia and the Pacific

- **Fastest aging region** in the world
- By 2050, **11 economies** in Asia and the Pacific region will be classified as “**super aged**”, and almost a quarter of the region’s population will be over 60.
- MORE elderly = MORE complex and chronic health conditions to manage → **highest rates of NCD mortality globally**
- **LOW stock of formal LTC workers** + overreliance on informal care, performed by women



Common NCD challenges across ADB regions

Central West Asia

1. Ischemic heart disease
2. Stroke
3. Cirrhosis of liver
4. Diabetes type 2

East Asia

1. Stroke
2. Ischemic heart disease
3. COPD*
4. Lung cancer

Pacific

1. Ischemic heart disease
2. Stroke
3. Diabetes type 2
4. COPD

South Asia

1. Ischemic heart disease
2. COPD
3. Stroke
4. Diabetes type 2

South East Asia

1. Stroke
2. Ischemic heart disease
3. Diabetes type 2
4. COPD

Ranked by share of disease burden

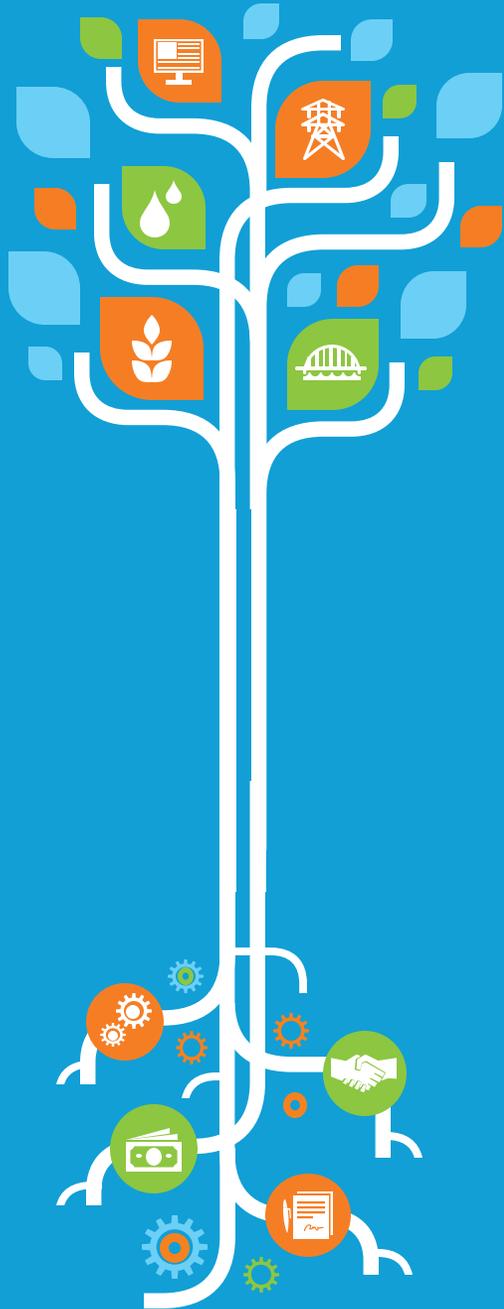
Türkiye (GBD 2019)

1. Ischemic heart disease
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3. Lung cancer
4. COPD

Outlook

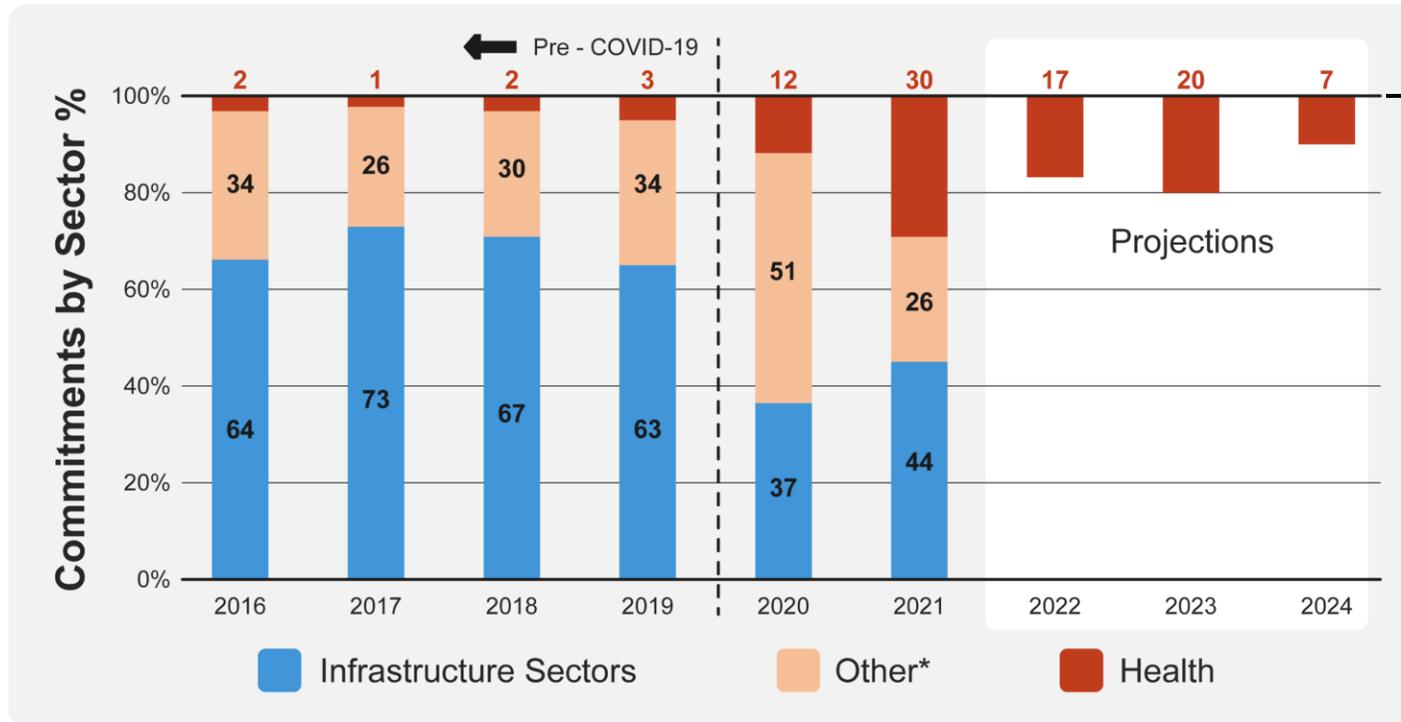
- **Increased spending on health** – improve preparedness, address health system gaps highlighted by COVID-19 pandemic, achieve UHC
- **Multisectoral / integrated approaches**
- **Digital technologies**
- **More demand for knowledge products**





What we will do

More ADB spending on health



Increase health sector portfolio share to **6-10%** of total commitments



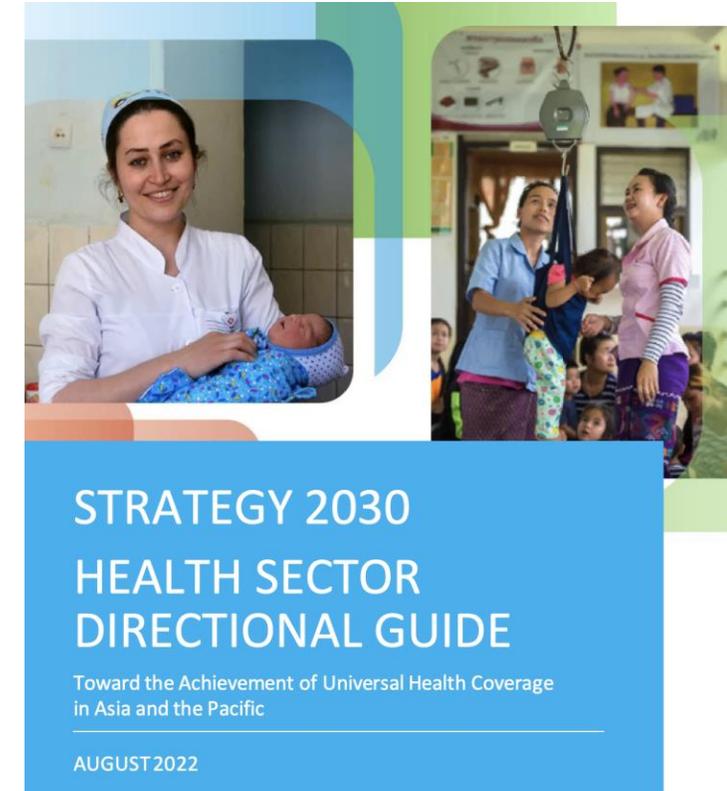
<https://www.adb.org/sites/default/files/page/813361/health-sector-directional-guide.pdf>

Health sector directional guide

- **Governance and policy** – regulation, legislation, stewardship, accountability
- **Health workforce** – managerial, clinical, technical
- **Health architecture** – material and information infrastructure, supply chains
- **Financing and incentives** - public and private sectors
- **Pandemic preparedness and response** – regional, national, subnational

* **CROSS-CUTTING PRIORITIES:** Climate / environment ; Gender

<https://www.adb.org/sites/default/files/page/813361/health-sector-directional-guide.pdf>



Climate change and health

Climate change is expected to increase health risks in Asia and the Pacific

Health outcome (disease/condition)	Annual global deaths % in Asia	Climate Change Impacts	
		Observed	Projected
Mental health	N/A	Negative	Negative
Environmental heat and cold exposure	46%	Negative	Negative
Dengue	96%	Negative	Negative
Cardiovascular disease	58%	Negative	Negative
Diabetes	56%	Negative	Negative
Non-communicable respiratory illness	74%	Negative	Negative
Diarrheal diseases	56%	Mixed	Negative
Death from malignant neoplasms	55%	Negative	-
Respiratory tract infections	47%	Mixed	-

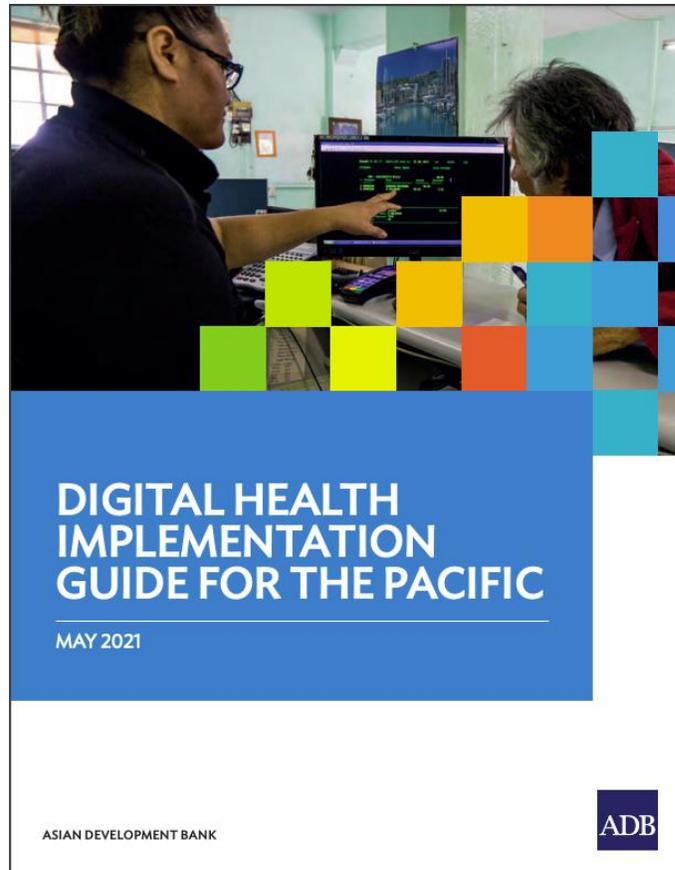
Cell color: darker shades indicate greater confidence in assessment

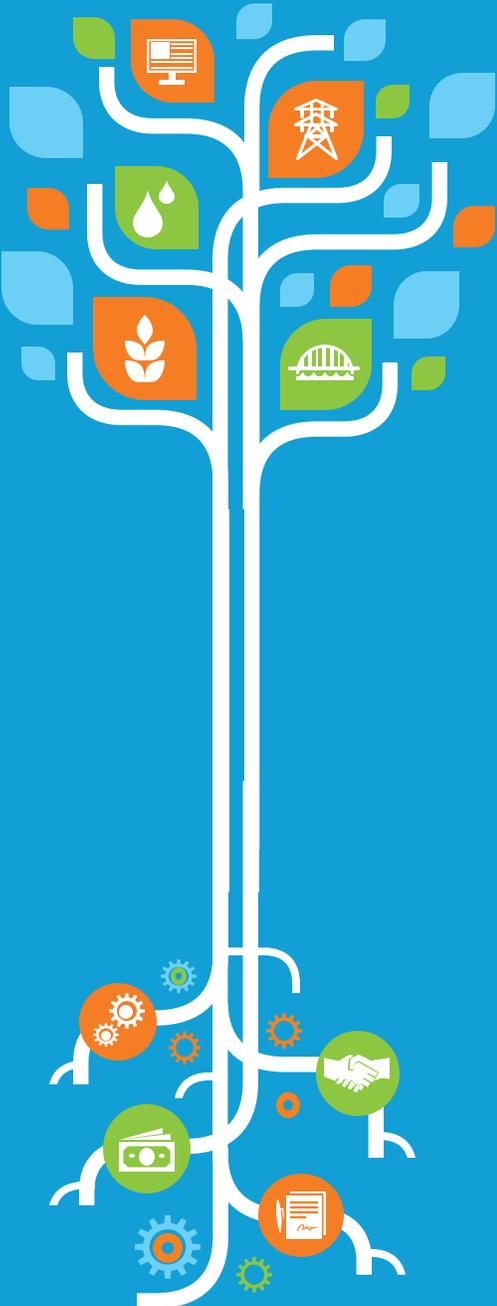
Blank cells indicate insufficient evidence for assessment

Mixed indicates positive and negative impacts (not shaded)



Digital health





Examples of pipeline health projects: Indicative demand from ADB Developing Member Countries

Central West Asia

• Pakistan

- Khyber Pakhtunkhwa Health Systems Strengthening Program (2022) – USD 50M
 - Addressing weak secondary hospital system (other donors supporting PHC), transitions of care
 - <https://www.adb.org/projects/54297-001/main>

Opportunities



Green health infrastructure: building design, low-carbon energy, process improvement

Climate and disaster-risk resilience: Climate-proofing, adaptive management, staff training



Digital health solutions: integrated, highly digitized, scalable solutions



Sustainable medical waste management: on-site waste compaction & incineration, biological waste disposal, circular economy

South Asia

• India

- Pradhan Mantri Atmanirbhar Swasth Bharat Yojana (PMASBY) (2022-2024) - ~USD 1B
 - Strengthening healthcare infrastructure
 - Developing new public health capacities (laboratories, critical care services, IT-systems etc.)

Opportunities



Coordination and emergency response



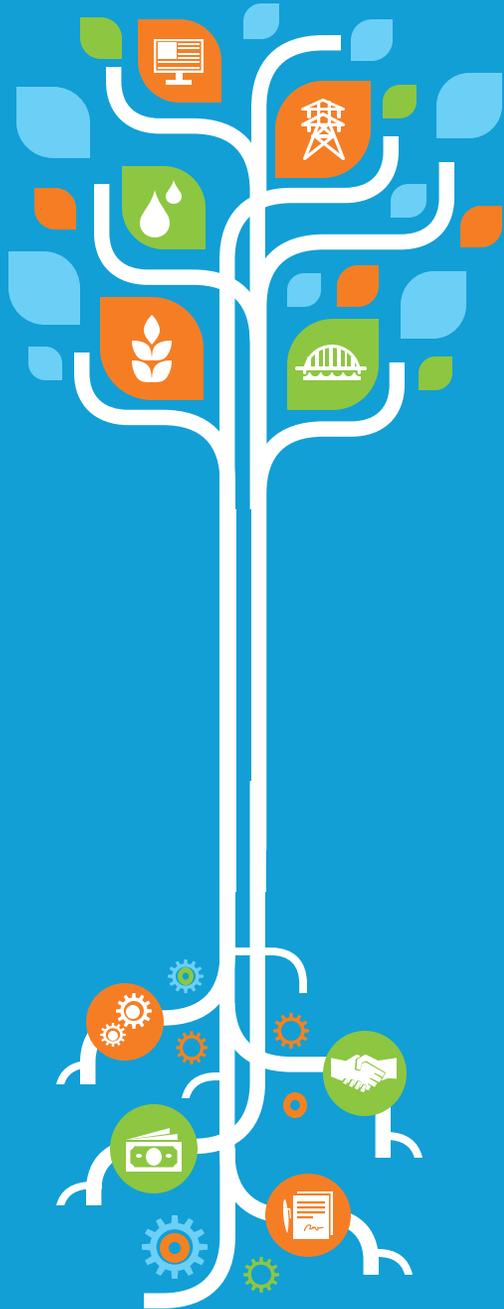
Integrated information systems, improved data analytics and interpretation



Design and engineering of new facilities, adoption of new disease monitoring tools and diagnostics



Training and systems: staff capacity development for complex health issues, ICT



Key opportunities

Major areas of current technical assistance support

Vaccine manufacturing

Regulation of medicines and vaccines

Medical education

Health financing systems – digital innovations

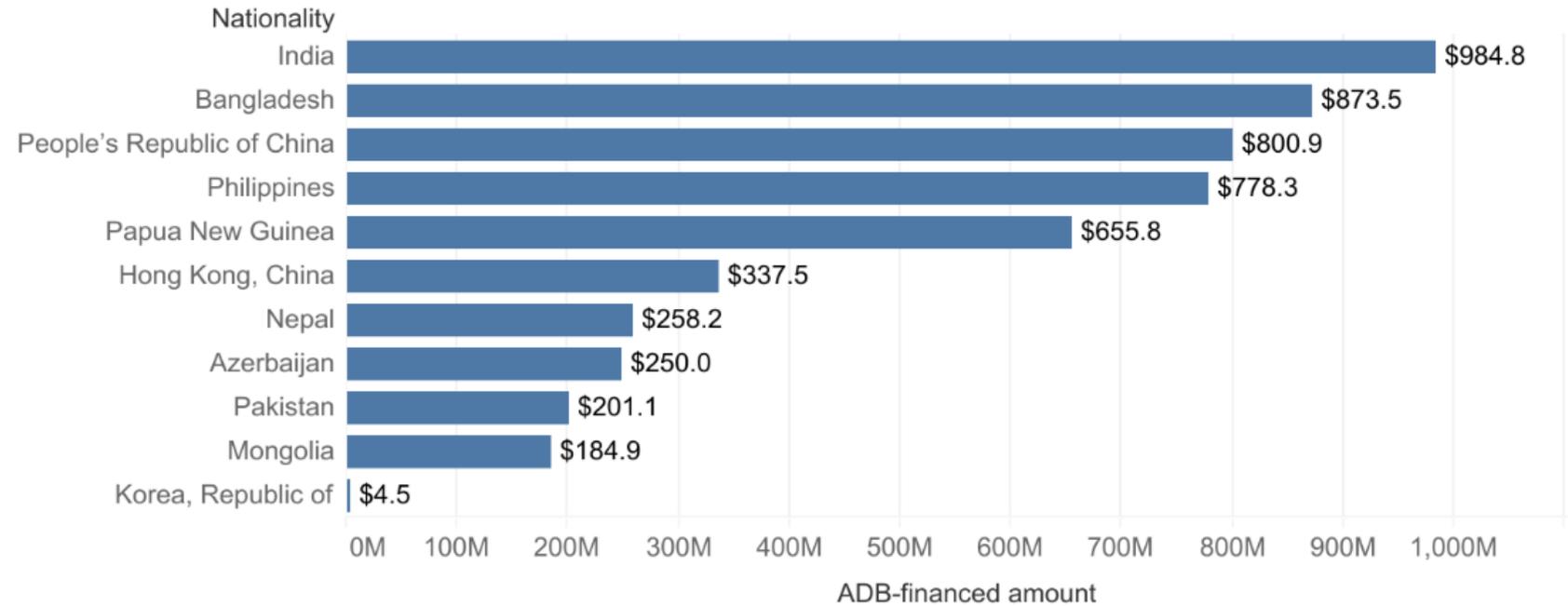


Major health contractors, 2018-2022

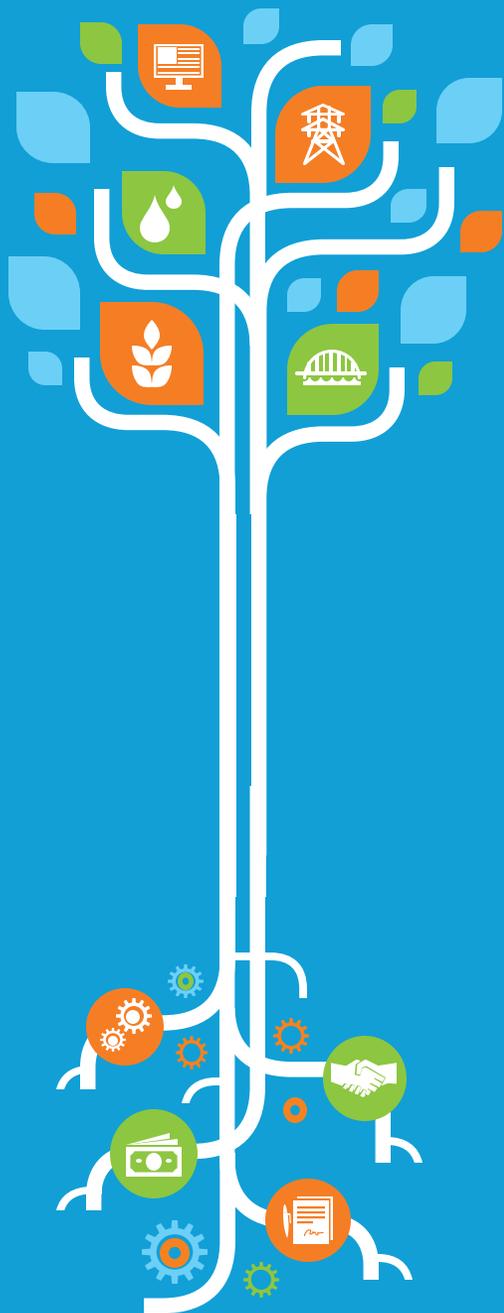
Total operational procurement based on contract year, US\$ million

\$5,329.5

Operational Procurement by Nationality of Contractor, US\$ million



<https://data.adb.org/dashboard/operational-procurement-statistics-nationality>



Thank you

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