

The evolution of healthcare & medical laboratories

Trends, procurement and
supply chain priorities

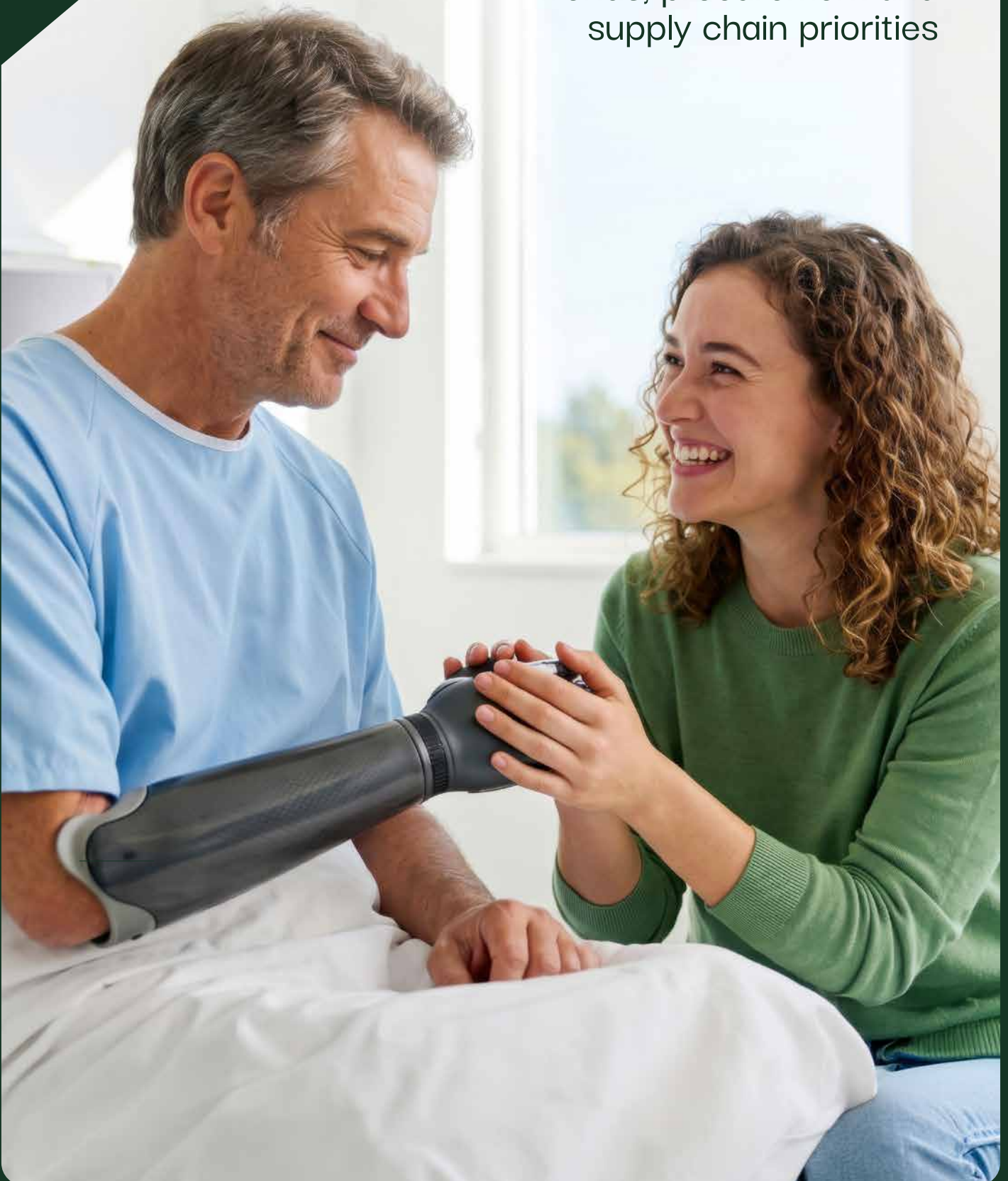


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Executive summary & market snapshot

Market outlook, key trends and growth drivers

Global healthcare is evolving towards connected, technology-enabled ecosystems where diagnostics, laboratories and digital health play an increasingly central role in improving patient outcomes. Medical laboratories underpin more than 70% of clinical decision-making, making diagnostics one of the most critical enablers of modern healthcare delivery. The global healthcare market is projected to exceed USD 26 trillion by 2035, while the global clinical diagnostics market is expected to reach approximately USD 169 billion by 2030, reflecting growing demand for precision medicine, laboratory automation and AI-enabled diagnostics.

Across the Middle East, healthcare expenditure is projected to exceed USD 135 billion by 2027, supported by sustained investment in healthcare infrastructure, laboratory capacity, digital transformation and localisation initiatives, positioning the region as one of the world's fastest-growing healthcare markets. Against this backdrop, WHX 2027 brings together healthcare providers, laboratories, manufacturers, suppliers and technology innovators to accelerate collaboration, showcase innovation and support the next generation of connected healthcare and laboratory ecosystems.

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Healthcare and medical labs evolution: Where is the next growth opportunity?

The convergence of healthcare, diagnostics, pharma, biotech and medtech is driving a new era of predictive, preventive and personalised care

Market snapshot

(Global market outlook, 2026-2031)

\$881B in 2031
CAGR 9.93%

Pharmaceutical
manufacturing

\$89B in 2031
CAGR 13%

Point-of-care
diagnostics

\$33B in 2031
CAGR 10.4%

Molecular diagnostics

\$47B in 2031
CAGR 8.2%

Longevity

\$103B in 2031
CAGR 4.46%

Diagnostic imaging

- Why it matters?
- Procurement driving early technology decisions
- Demand shifting to integrated solutions
- Bundled service models gaining traction



Healthcare is expanding:

Strong market growth across key segments



Technology is transforming:

AI, automation and data are redefining healthcare



Markets are converging:

Diagnostics, digital, pharma, wellness, and care delivery



Procurement is evolving:

Resilience, value and partnerships over price-led decisions

Technology priorities



AI and automation:

Enhancing accuracy, operational efficiency and predictive capabilities



Connected and decentralised testing:

Driving convenience, speed and cost efficiency



Point-of-care testing:

Expanding access to testing while enabling faster clinical decisions



Diagnostics: Drives

70% of clinical decisions

Major growth drivers

- Chronic disease burden: Demand for high-volume automated testing
- Ageing populations: Growing need for imaging and diagnostics
- Precision medicine and NGS: Increased investment in genomics bioinformatics
- Domestic manufacturing: Stronger local supply chains and supplier diversity

Key takeaways

- Diagnostics is moving to the boardroom
- AI and automation improve efficiency and accuracy
- Procurement is shifting to service-based models
- Innovation and buyer-seller matchmaking are growing priorities

The future of healthcare is integrated, intelligent and impactful. The next growth opportunity lies in collaboration, innovation and value-driven partnerships



Innovation driving healthcare and diagnostics

AI, precision medicine, connected care and technology investment priorities

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“Diagnostics companies have an opportunity to shape the future of healthcare delivery through technologies that are more convenient, accessible, affordable, and capable of delivering actionable results quickly.”

Trend	Key highlights	Why it matters	Business implication
AI-Enabled Diagnostics, Laboratory Automation & Digital Pathology	- AI reduces slide review by 30–40% - Digital pathology growing at 8.3% CAGR - Adoption shifting to routine clinical workflows Example - PathAI & Paige AI : FDA-recognised AI driving digital pathology adoption.	- Improves diagnostic accuracy - Reduces turnaround time (TAT) - Enhances laboratory productivity	- Invest in AI-ready, LIS/IVDR-compliant platforms - Scale laboratory automation across high-volume testing
Precision Medicine, Genomics & Personalised Healthcare	- Genomics and companion diagnostics are expanding - Multi-omics and CRISPR drive precision medicine - Precision medicine growing at double-digit rates Example - Tempus Next : AI platform optimising oncology care pathways.	- Enables personalised treatment - Increases demand for genomic testing	- Integrate genomics with EHRs - Expand companion diagnostics capabilities
Smart Hospitals & Connected Care	- POCT market growing at ~11% CAGR - AI-enabled IVD and cloud adoption accelerating - Decentralised testing expanding Example - BD Veritor : FDA 510(k) cleared 15-minute digital antigen test for point-of-care settings.	- Extends diagnostics beyond central labs - Supports connected healthcare delivery - Improves efficiency and diagnostic quality	- Deploy interoperable POCT solutions - Invest in cloud-enabled diagnostic ecosystems
Technology Investment Priorities	- Laboratory Automation & Robotics - Cloud Digital Pathology - AI-enabled POCT - Genomics & EHR Integration Example - Philips’ cloud-enabled IntelliSite Pathology Solution, powered by AWS, streamlines and scales digital pathology.	- Improves efficiency and diagnostic quality - Reduces costs and compliance risk	- Prioritise scalable digital platforms - Build interoperable, future-ready laboratories

Strategic recommendations				
Bundle integrated solutions	Sell clinical outcomes	Target mid-market hospitals	Expand preventive care	Prioritise interoperability
Offer end-to-end diagnostic to therapy solutions across healthcare segments	Lead with faster turnaround, fewer errors and improved workforce efficiency, not just features	Expand digital pathology through modular, subscription-based models	Combine AI-POCT, wearables and remote monitoring to support proactive care	Ensure seamless LIS, cloud and API integration to meet regulatory and procurement requirements

Procurement & supply chain transformation

Shifting strategies, sustainability and procurement considerations

01	Procurement priorities are shifting	02	Digital & AI-enabled supply chains	03	Resilience, regionalisation and sustainability
• Procurement is shifting from cost-driven to value and resilience focused sourcing. • 70%+ of healthcare organisations faced supply disruptions, driving supplier diversification. • 93% of U.S. hospitals plan to expand GPO use by 2026 for savings and analytics. • Rising inflation, compliance requirements and supply disruptions continue to increase procurement costs.		• AI, cloud platforms and predictive analytics are becoming core procurement requirements. • Cloud-enabled supply chains can reduce inventory costs by up to 30%. • AI-driven demand planning improves forecasting accuracy and reduces stockouts. • Digital integration with ERP/EHR systems is becoming a key evaluation criterion.		• AI, cloud platforms and predictive analytics are becoming core procurement requirements. • Cloud-enabled supply chains can reduce inventory costs by up to 30%. • AI-driven demand planning improves forecasting accuracy and reduces stockouts. • Digital integration with ERP/EHR systems is becoming a key evaluation criterion.	

Strategic implications

01	Integrated solutions	02	Procurement innovation	03	Buyer-supplier engagement	04	Value proposition
• Showcase integrated healthcare solutions • Combine medical equipment, diagnostics, AI & IT • Highlight supply chain technologies		• Launch a procurement innovation programme • Focus on AI and digital procurement • Promote sustainable sourcing		• Facilitate buyer-supplier matchmaking • Prioritise regional manufacturing • Emphasise digital integration & ESG		• Position value over products • Highlight resilience and interoperability • Differentiate through long-term partnerships	

Key procurement priorities for healthcare buyers



Predictive procurement

AI forecasting and outcome-based sourcing



Supplier diversification

Regional manufacturing and supply resilience



Supply chain visibility

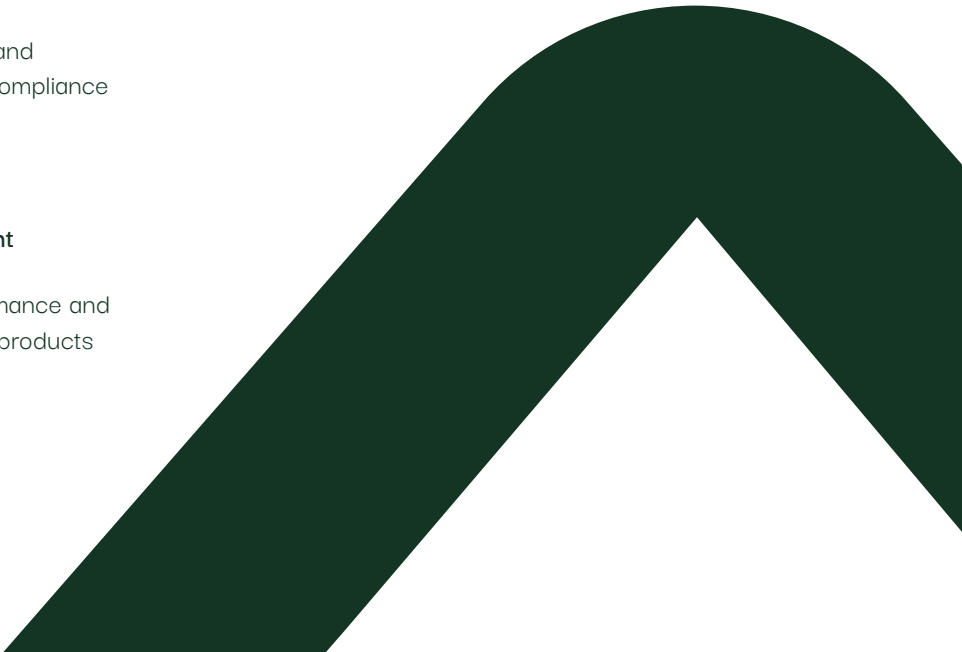
End-to-end traceability and regulatory compliance



Sustainable procurement

ESG performance and low-carbon products

Deliver integrated, sustainable and resilient procurement to improve patient outcomes and build a future-ready healthcare ecosystem



Global outlook and perspective

Emerging opportunities, outlook and recommendations

Global and Middle East healthcare and diagnostics outlook



Investment accelerating

Healthcare capacity and infrastructure continue to expand



Value-based care gaining momentum

Focus on outcomes, efficiency and integrated solutions



Regional manufacturing growing

local production and supply chain resilience are priorities



Diagnostics at the core

Precision diagnostics and early detection drive better outcomes



AI & Digital health scaling:

AI, automation and connected care are becoming mainstream

Future outlook and executive recommendations



Expand cross-sector participation

Engage the full ecosystem to create shared value



Foster innovation partnerships

Collaborate across sectors to accelerate transformation



Strengthen laboratory & diagnostics ecosystem

Invest in capabilities, quality and collaboration



WHX 2027 brings the connected healthcare ecosystem together

The meeting point for innovation, investment and impact

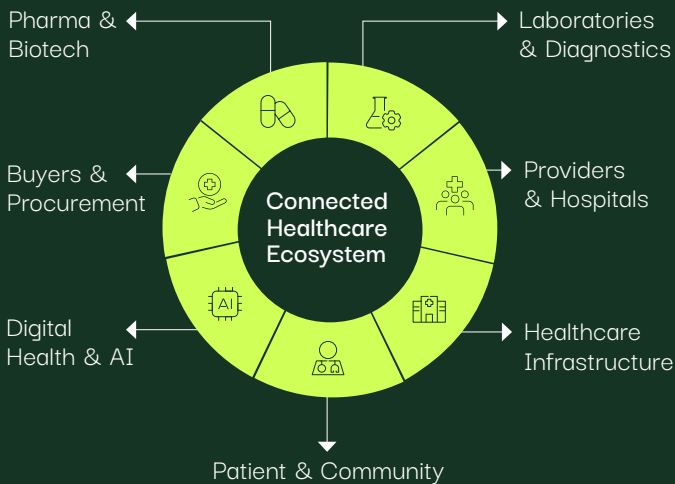
Emerging opportunities

- Preventive diagnostics
- AI decision support
- Precision medicine
- Remote monitoring
- Regenerative medicine
- Wearables
- Smart laboratories
- Wellness & longevity



WHX 2027 brings the connected healthcare ecosystem together

Building the next era of healthcare through innovation, collaboration and integration



WHX 2027

The strategic platform for innovation & Collaboration

- Unite the healthcare ecosystem
- Connect buyers & suppliers
- Showcase innovation
- Drive future healthcare growth





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