

# **Middle East & Africa Health Economics and Outcome Research (HEOR) Services Market Size and Forecast (2021-2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Service (Economic Modelling or Evaluation, Real World Data Analysis and Information System, Market Access Solutions and Reimbursement, Clinical Outcome, Other Services), Service Provider (Contract Research Organizations and Consultancy), and End User (Biotechnology and Pharmaceutical Companies, Healthcare Payers, Government Organizations, and Healthcare Providers)**

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## **Abstracts**

The Health Economics and Outcomes Research (HEOR) services market in the Middle East and Africa (MEA) is projected to experience significant growth, with an expected market size of approximately US\$ 114.15 million by 2031, up from US\$ 61.15 million in 2024. This growth translates to a compound annual growth rate (CAGR) of 9.3% from 2024 to 2031, reflecting the increasing demand for healthcare solutions in the region.

### **Executive Summary**

The MEA HEOR services market is expanding rapidly, driven by a combination of rising healthcare demands and increased pharmaceutical activities. Key countries in this region include the United Arab Emirates, Saudi Arabia, South Africa, and others. Among

these, Saudi Arabia stands out as the largest and most dynamic market, bolstered by substantial investments in health infrastructure and policy reforms under the Vision 2030 initiative. The growing prevalence of chronic diseases such as diabetes, cardiovascular diseases, and cancer is further fueling the demand for evidence-based healthcare solutions, which in turn drives the utilization of HEOR services.

Pharmaceutical and biotechnology companies are increasingly launching products across the region, seeking market access solutions and value-based outcomes to meet payer and regulatory requirements. The rise in healthcare spending, supported by both public and private funding, continues to enhance the market environment. Consequently, the MEA HEOR services market is well-positioned for sustained growth, presenting significant opportunities for stakeholders and service providers.

## **Market Segmentation Analysis**

The MEA HEOR services market can be segmented based on service type, service provider, and end user.

- 1. Service Type:** The market is divided into several categories, including economic modeling or evaluation, real-world data analysis and information systems, market access solutions and reimbursement, clinical outcomes, and others. In 2024, the economic modeling or evaluation segment is expected to hold the largest market share.
- 2. Service Provider:** The market is further categorized into contract research organizations (CROs) and consultancy firms. The CRO segment is anticipated to dominate the market in 2024 due to its extensive capabilities in conducting research and analysis.
- 3. End User:** The end users of HEOR services include biotechnology and pharmaceutical companies, healthcare payers, government organizations, and healthcare providers. The biotechnology and pharmaceutical companies segment is projected to hold the largest share in 2024, reflecting the critical role of HEOR in drug development and market access strategies.

## **Market Outlook**

The healthcare industry consistently demands innovative product development, which is essential for delivering quality healthcare solutions. The increasing incidence of both acute and chronic diseases, along with a growing preference for minimally invasive

treatments, is driving healthcare expenditures and the need for advanced technologies. Innovations in genomics, artificial intelligence, minimally invasive procedures, point-of-care services, and robotic treatments are reshaping the healthcare landscape.

Manufacturers are focused on providing cost-effective and efficient products, which enhances communication between healthcare providers and patients. This improved communication fosters greater awareness and knowledge, contributing to the growth of both companies and the healthcare industry as a whole. HEOR plays a crucial role in this process by helping stakeholders understand the value of healthcare interventions and their outcomes, bridging the gap between clinical trials and real-world health results.

HEOR service providers assist pharmaceutical, biotechnology, and medical device companies in articulating the value of their innovations to various stakeholders, including physicians, payers, and patients. As product development accelerates, the demand for HEOR services is expected to rise, further propelling market growth.

## **Country Insights**

The MEA HEOR services market encompasses several key countries, including Saudi Arabia, South Africa, the UAE, and others. Saudi Arabia is projected to hold the largest market share in 2024. The HEOR services market in Saudi Arabia is emerging as a vital resource for healthcare coverage and access decisions, driven by the rapid increase in pharmaceutical spending and a growing interest in the economic evaluation of healthcare interventions.

The Vision 2030 initiative in Saudi Arabia is pivotal in diversifying the economy and modernizing various sectors, including healthcare. This initiative promotes the integration of HEOR into the national health strategy, emphasizing value-based care that focuses on patient outcomes and cost-effectiveness. The shift from traditional fee-for-service models to value-based reimbursement systems is accelerating the adoption of HEOR methodologies, as healthcare providers seek to optimize resource allocation and improve patient access to innovative treatments.

## **Company Profiles**

Key players in the MEA HEOR services market include PharmaLex GmbH, ICON Plc, IQVIA Holdings Inc, Syneos Health Inc, Optum Inc, Certara Inc., ExlService Holdings, Inc., Avalon Health Economics LLC, Axtria, Inc., and McKesson Corp, among others.

These companies are employing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and deliver innovative solutions to their clients.

## Contents

### **1. INTRODUCTION**

- 1.1 Report Guidance
- 1.2 Market Segmentation

### **2. EXECUTIVE SUMMARY**

- 2.1 Key Insights

### **3. RESEARCH METHODOLOGY**

- 3.1 Secondary Research
- 3.2 Primary Research
  - 3.2.1 Hypothesis formulation:
  - 3.2.2 Macroeconomic factor analysis:
  - 3.2.3 Developing base number:
  - 3.2.4 Data Triangulation:
  - 3.2.5 Country-level data:
- 3.3 Assumptions and Limitations

### **4. MIDDLE EAST AND AFRICA HEALTH ECONOMICS AND OUTCOME RESEARCH (HEOR) SERVICES MARKET - KEY MARKET DYNAMICS**

- 4.1 Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Key Market Dynamics
- 4.2 Market Drivers
  - 4.2.1 Increasing Product Development
  - 4.2.2 Growing Healthcare Spending
  - 4.2.3 Surge in Clinical Trials
- 4.3 Market Restraints
  - 4.3.1 Restrictions on Access to Real-World Data (RWD)
- 4.4 Market Opportunities
  - 4.4.1 Emergence of Precision Medicines
- 4.5 Future Trends
  - 4.5.1 Digitalization in Healthcare
- 4.6 Impact of Drivers and Restraints:

## **5. MIDDLE EAST AND AFRICA HEALTH ECONOMICS AND OUTCOME RESEARCH (HEOR) SERVICES MARKET - ANALYSIS**

5.1 Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market Revenue (US\$ Million), 2021-2031

5.2 Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market Forecast Analysis

## **6. MIDDLE EAST AND AFRICA HEALTH ECONOMICS AND OUTCOME RESEARCH (HEOR) SERVICES MARKET ANALYSIS - BY SERVICE**

6.1 Economic Modelling or Evaluation

6.1.1 Overview

6.1.2 Economic Modelling or Evaluation: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

6.2 Real World Data Analysis and Information System

6.2.1 Overview

6.2.2 Real World Data Analysis and Information System: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

6.3 Market Access Solutions and Reimbursement

6.3.1 Overview

6.3.2 Market Access Solutions and Reimbursement: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

6.4 Clinical Outcome

6.4.1 Overview

6.4.2 Clinical Outcome: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

6.5 Others

6.5.1 Overview

6.5.2 Others: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

## **7. MIDDLE EAST AND AFRICA HEALTH ECONOMICS AND OUTCOME RESEARCH (HEOR) SERVICES MARKET ANALYSIS - BY SERVICE PROVIDER**

7.1 Contract Research Organizations

### 7.1.1 Overview

7.1.2 Contract Research Organizations: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

## 7.2 Consultancy

### 7.2.1 Overview

7.2.2 Consultancy: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

## **8. MIDDLE EAST AND AFRICA HEALTH ECONOMICS AND OUTCOME RESEARCH (HEOR) SERVICES MARKET ANALYSIS - BY END USER**

### 8.1 Biotechnology and Pharmaceutical Companies

#### 8.1.1 Overview

8.1.2 Biotechnology and Pharmaceutical Companies: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

### 8.2 Healthcare Payers

#### 8.2.1 Overview

8.2.2 Healthcare Payers: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

### 8.3 Government Organizations

#### 8.3.1 Overview

8.3.2 Government Organizations: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

### 8.4 Healthcare Providers

#### 8.4.1 Overview

8.4.2 Healthcare Providers: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

## **9. MIDDLE EAST AND AFRICA HEALTH ECONOMICS AND OUTCOME RESEARCH (HEOR) SERVICES MARKET - COUNTRY ANALYSIS**

### 9.1 Middle East and Africa

9.1.1 Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast Analysis - by Country

9.1.1.1 Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast Analysis - by Country

9.1.1.2 Saudi Arabia: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9.1.1.2.1 Saudi Arabia: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market Share - by Service

9.1.1.2.2 Saudi Arabia: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market Share - by Service Provider

9.1.1.2.3 Saudi Arabia: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market Share - by End User

9.1.1.3 South Africa: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9.1.1.3.1 South Africa: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market Share - by Service

9.1.1.3.2 South Africa: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market Share - by Service Provider

9.1.1.3.3 South Africa: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market Share - by End User

9.1.1.4 United Arab Emirates: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9.1.1.4.1 United Arab Emirates: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market Share - by Service

9.1.1.4.2 United Arab Emirates: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market Share - by Service Provider

9.1.1.4.3 United Arab Emirates: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market Share - by End User

9.1.1.5 Rest of Middle East and Africa: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

9.1.1.5.1 Rest of Middle East and Africa: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market Share - by Service

9.1.1.5.2 Rest of Middle East and Africa: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market Share - by Service Provider

9.1.1.5.3 Rest of Middle East and Africa: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market Share - by End User

## **10. INDUSTRY LANDSCAPE**

10.1 Overview

10.2 Expansion

- 10.3 Collaboration
- 10.4 Merger and Acquisition
- 10.5 Partnerships
- 10.6 Other Business Strategies

## **11. COMPANY PROFILES**

- 11.1 PharmaLex GmbH
  - 11.1.1 Key Facts
  - 11.1.2 Business Description
  - 11.1.3 Products and Services
  - 11.1.4 Financial Overview
  - 11.1.5 SWOT Analysis
  - 11.1.6 Key Developments
- 11.2 ICON Plc
  - 11.2.1 Key Facts
  - 11.2.2 Business Description
  - 11.2.3 Products and Services
  - 11.2.4 Financial Overview
  - 11.2.5 SWOT Analysis
  - 11.2.6 Key Developments
- 11.3 IQVIA Holdings Inc
  - 11.3.1 Key Facts
  - 11.3.2 Business Description
  - 11.3.3 Products and Services
  - 11.3.4 Financial Overview
  - 11.3.5 SWOT Analysis
  - 11.3.6 Key Developments
- 11.4 Syneos Health Inc
  - 11.4.1 Key Facts
  - 11.4.2 Business Description
  - 11.4.3 Products and Services
  - 11.4.4 Financial Overview
  - 11.4.5 SWOT Analysis
  - 11.4.6 Key Developments
- 11.5 Optum Inc
  - 11.5.1 Key Facts
  - 11.5.2 Business Description
  - 11.5.3 Products and Services

- 11.5.4 Financial Overview
- 11.5.5 SWOT Analysis
- 11.5.6 Key Developments
- 11.6 Certara Inc.
  - 11.6.1 Key Facts
  - 11.6.2 Business Description
  - 11.6.3 Products and Services
  - 11.6.4 Financial Overview
  - 11.6.5 SWOT Analysis
  - 11.6.6 Key Developments
- 11.7 ExlService Holdings, Inc.
  - 11.7.1 Key Facts
  - 11.7.2 Business Description
  - 11.7.3 Products and Services
  - 11.7.4 Financial Overview
  - 11.7.5 SWOT Analysis
  - 11.7.6 Key Developments
- 11.8 Avalon Health Economics LLC
  - 11.8.1 Key Facts
  - 11.8.2 Business Description
  - 11.8.3 Products and Services
  - 11.8.4 Financial Overview
  - 11.8.5 SWOT Analysis
  - 11.8.6 Key Developments
- 11.9 Axtria, Inc.
  - 11.9.1 Key Facts
  - 11.9.2 Business Description
  - 11.9.3 Products and Services
  - 11.9.4 Financial Overview
  - 11.9.5 SWOT Analysis
  - 11.9.6 Key Developments
- 11.10 McKesson Corp
  - 11.10.1 Key Facts
  - 11.10.2 Business Description
  - 11.10.3 Products and Services
  - 11.10.4 Financial Overview
  - 11.10.5 SWOT Analysis
  - 11.10.6 Key Developments

## **12. APPENDIX**

12.1 About the Insight Partners

12.2 Glossary of Terms for HEOR Services Market

## List Of Tables

### LIST OF TABLES

Table 1. Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market Segmentation

Table 2. Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Table 3. Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Service

Table 4. Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Service Provider

Table 5. Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by End User

Table 6. Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Country

Table 7. Saudi Arabia: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Service

Table 8. Saudi Arabia: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Service Provider

Table 9. Saudi Arabia: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by End User

Table 10. South Africa: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Service

Table 11. South Africa: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Service Provider

Table 12. South Africa: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by End User

Table 13. United Arab Emirates: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Service

Table 14. United Arab Emirates: Middle East and Africa Health Economics and

Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Service Provider

Table 15. United Arab Emirates: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by End User

Table 16. Rest of Middle East and Africa: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Service

Table 17. Rest of Middle East and Africa: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by Service Provider

Table 18. Rest of Middle East and Africa: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021 - 2031(US\$ Million) - by End User

Table 19. Glossary of Terms

## List Of Figures

### LIST OF FIGURES

Figure 1. Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market Segmentation - Country

Figure 2. Impact Analysis of Drivers and Restraints

Figure 3. Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market Revenue (US\$ Million), 2021-2031

Figure 4. Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market Share (%) - by Service (2024 and 2031)

Figure 5. Economic Modelling or Evaluation: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 6. Real World Data Analysis and Information System: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 7. Market Access Solutions and Reimbursement: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 8. Clinical Outcome: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 9. Others: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 10. Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market Share (%) - by Service Provider (2024 and 2031)

Figure 11. Contract Research Organizations: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 12. Consultancy: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 13. Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market Share (%) - by End User (2024 and 2031)

Figure 14. Biotechnology and Pharmaceutical Companies: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 15. Healthcare Payers: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 16. Government Organizations: Middle East and Africa Health Economics and

Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 17. Healthcare Providers: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 18. Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market Breakdown, by Key Countries, 2024 and 2031 (%)

Figure 19. Saudi Arabia: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 20. South Africa: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 21. United Arab Emirates: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 22. Rest of Middle East and Africa: Middle East and Africa Health Economics and Outcome Research (HEOR) Services Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

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