

Middle East & Africa Occupational Health Market Forecast to 2030 - Regional Analysis - by Offering (Product, Solution, and Service), Category (Safety, Chemicals, Biological, Physical & Environmental, Ergonomics, Vaccination & immunizations, and Others), Employee Type (Remote, Hybrid, and Physical Presence), Site Location (On-Site, Off-Site, and Shared-Site), Type (Physical Wellbeing and Social & Mental Wellbeing), and Industry [Automobile, Chemical, Engineering, Government (including Federal), Manufacturing, Mining, Oil & Gas, Pharmaceutical, Ports, and Others]

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Abstracts

The Middle East & Africa occupational health market is expected to grow from US\$ 90.85 million in 2022 to US\$ 113.52 million by 2030. It is estimated to grow at a CAGR of 2.8% from 2022 to 2030.

Incorporation of Robotics for Enhancing Occupational Health Fuels Middle East & Africa Occupational Health Market

The availability of relatively inexpensive robots capable of performing in a shared environment with human workers has driven a new robotic era. For instance, human workers are equipped with performance-enhancing robotic devices, such as exoskeletons and capacity-enhancing prostheses. Collaborative robots are designed for

direct interaction with humans; they can be of three types—industrial, professional, and personal service. Implementing robotics in the workplace would protect workers from exposure to hazardous substances, environments, and physical agents. For example, robotics is deployed for handling radioactive materials and working in high-dust exposure environments, resulting in health and safety benefits, production efficiency, and quality improvements.

Additionally, several remote wireless sensors are now employed for monitoring worksites and facilities. Similarly, risk assessment of new technologies quickly determines workers' safety and health issues. Thus, robotics-led automation of tasks will start a new diverse trend in the Middle East & Africa occupational health market .

Middle East & Africa Occupational Health Market Overview

The Middle East & Africa occupational health market is categorized into the UAE, Saudi Arabia, South Africa, and the Rest of Middle East & Africa. Occupational stress can lead to poor health and work-related injuries. The organizational environment is considered an essential indicator of employee behavior as the working conditions are linked with employees' job performance and job satisfaction leading to better organizational performance. A stressful work environment affects employee performance severely, the higher the job stress, the lower the job performance. Healthcare Workers (HCWs), especially physicians and nurses, are exposed to various risk factors, such as long working hours, leading to work-related mental health issues, including anxiety and burnout, causing a negative impact on the health system. According to the study of "Occupational Health of Frontline Healthcare Workers in the United Arab Emirates," in 2020, half of HCWs (54.2%) reported having more than the normal musculoskeletal pain or discomfort in the one week, and from those, 59% identified back pain, 26% in their lower body, and 15% in their upper limbs. A prevalence of 26.3% anxiety and 28% depression was observed among HCWs. HCWs have identified the need for better occupational health services that focus on mental health, so occupational health services should be provided to ensure that HCWs can provide a high-quality standard of care to all patients. Nurses have a workplace environment that can impact job-related stress uniquely. According to "Job-related stress among nurses in primary healthcare centers in Arab city, Saudi Arabia" study in 2019, states that in nurses working at primary healthcare centers most frequent areas of work-related stress were boredom-induced stress (33%), pressure on the job (32%), work under load stress (27%), and disagreement and indecision (26%). Work-related stress is a considerably prevalent problem among nurses as it impacts nearly one-third of them.

The anxiety and pressure levels rapidly increased among individuals working from home during the pandemic. According to the 2021 Cigna 360 Wellbeing Survey, stress among the UAE workforce (~88%) is ranked among the highest in the world, and there is a rise in mental health issues induced due to changes in work environments. Also, the COVID-19 pandemic has negatively affected the mental health of the UAE workforce. Per the same source, 50% of UAE workers want to change their job over the next 12 months, compared to a global average of 31%. Also, a study published in 2021, "Job loss and mental health during the COVID-19 lockdown: Evidence from South Africa," states that the economic fallout of the COVID-19 pandemic resulted in unprecedented job losses that impaired mental wellbeing significantly. After HIV and other infectious disorders, mental health and nervous system disorders are the third-highest contributors to the burden of disease in South Africa. However, mental disorders are far less likely to be treated than physical disorders. In addition, the South African Declaration on the Prevention and Control of Non-Communicable Diseases is to increase the number of people screened and treated for mental illness by 30 percent by 2030. The application of interventional programs to relieve stress sources and training of nurses on stress management is crucial. Therefore, the increase in work stress is one of the factors that is creating opportunities for introduction of Middle East & Africa occupational health market in every industry in Middle East & Africa.

Furthermore, the Middle East & Africa economy continues to expand year after year, and this growth has driven the need for a robust labor force across multiple industries, due to this the government of countries in the Middle East & Africa are focusing on protecting the health and safety of the expanding workforce. For instance, the UAE has established a standardized approach for managing occupational health and safety (OHS) risks. The UAE Occupational Health and Safety Management System (OHSMS) Standard developed by the National Crisis Emergency and Disasters Management Authority (NCEMA) specifies the requirements for an organization to establish, implement and maintain an OHSMS to manage OHS risks. The Standard was developed based on research of international standards in occupational health and safety, study of incidents in the UAE, and with support of a nationwide stakeholder community. In addition, the Saudi Arabia Ministry of Labor and Social Development provided new guidelines that ensured workers' occupational health and safety. In compliance with the National Strategic Program for Occupational Safety and Health, the new resolution provided employers with a framework to manage all the occupational health and safety issues affecting their employees. Saudi Arabia seriously focused on the new occupational health and safety guideline, and the Ministry urged all employers in all environments to comply with this and work within the new framework.

Therefore, the increase in work-related stress in every industry and introduction of new policies by government for maintaining the occupation health of the employees is fueling the growth of the Occupational Health market in the Middle East and Africa region.

Middle East & Africa Occupational Health Market Revenue and Forecast to 2030 (US\$ Million)

Middle East & Africa Occupational Health Market Segmentation

The Middle East & Africa occupational health market is segmented into offerings, category, employee type, site location, type, industry, and country.

Based on offerings, the Middle East & Africa occupational health market is segmented into products, solutions, and services. The services segment held the largest share of the Middle East & Africa occupational health market in 2022.

Based on category, the Middle East & Africa occupational health market is segmented into safety, chemicals, biological, physical & environment, ergonomic, vaccination & immunizations, and others. The physical & environment segment held the largest share of the Middle East & Africa occupational health market in 2022.

Based on employee type, the Middle East & Africa occupational health market is segmented into remote, hybrid, and physical presence. The remote segment held the largest share of the Middle East & Africa occupational health market in 2022.

Based on site location, the Middle East & Africa occupational health market is segmented into on-site, off-site, and shared-site. The off-site segment held the largest share of the Middle East & Africa occupational health market in 2022.

Based on type, the Middle East & Africa occupational health market is segmented into physical wellbeing and social & mental wellbeing. The physical wellbeing segment held a larger share of the Middle East & Africa occupational health market in 2022.

Based on industry, the Middle East & Africa occupational health market is segmented into automobile, chemical, engineering, government (including federal), manufacturing, mining, oil & gas, pharmaceutical, ports, others. The government segment held the largest share of the Middle East & Africa occupational health market in 2022.

Based on country, the Middle East & Africa occupational health market is segmented

into the UAE, Saudi Arabia, South Africa, and the Rest of Middle East & Africa. Saudi Arabia dominated the Middle East & Africa occupational health market in 2022.

Alleanza Healthcare, Axa SA, Bureau Veritas, and UL Solutions Inc are some of the leading companies operating in the Middle East & Africa occupational health market.

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