

Home Is the New Hospital: Your Playbook for Entering Saudi’s Booming Remote Patient Monitoring (RPM) Market

AI-powered RPM is redefining healthcare in Saudi Arabia, fueled by Vision 2030, hybrid care adoption, and a surge in chronic and geriatric conditions. With virtual hospitals expanding and continuous glucose monitoring (CGM) demand rising, startups have a golden opportunity to offer culturally localized, scalable solutions that blend tech innovation with outcome-based pricing and care.



Source(s): World Bank, Saudi Public Health Authority, Invest Saudi, International Diabetes Federation Diabetes Atlas, Saned Health, Arab News, GrandView Research, World Health Expo

How big is the opportunity?



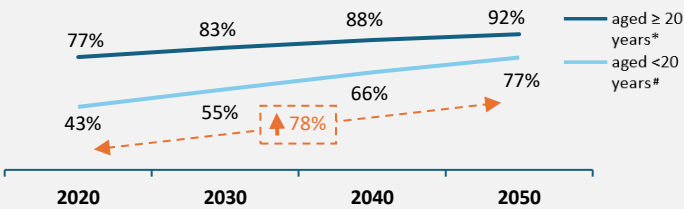
KSA accounts for **65% of the GCC’s CGM market**, with the country reporting a **projected CAGR of ~12%** through 2035

What’s driving the market?

Top 3 Prevalence of NCDs (share of population, aged ≥15 years)

NCDs	2023	2025	2030
Chronic Kidney Disease	13%	14%	16%
Diabetes	11%	12%	14%
Ischemic Heart Disease & Stroke	7%	7%	9%

People with Overweight & Obesity (share of population, by age group)



KSA stands **ninth in the world** with **~46,500** children and adolescents under 20 living with **T1 Diabetes** in 2024

Where is the market headed?

- Integration of cloud-based platforms, wearables, and AI-powered diagnostic tools**
- Clearer guidelines and regulations around data privacy and interoperability** may lead to international players exploring the market
- Public-private partnerships** between the Saudi MoH, local hospitals, and tech RPM vendors



Market Entry Strategy Framework



Build for B2B2C + Government

Digital health in KSA thrives on ecosystem partnerships

-  *Position solution for hospital groups, insurers, employers, and public entities. Follow a Govt-first approach—set up a JV and secure contracts via MoH procurement pathways*



Localization = Adoption

Cultural factors (language, camera reluctance) and a shortage of local professionals can stall RPM adoption

-  *Address cultural/language barriers, build Arabic UI/UX, partner with local care providers*



Mental + Geriatric RPM

With Alzheimer’s cases tripling by 2060 and mental health disorders peaking in youth, niche RPM tools (e.g. cognitive tracking, behavioral analytics) will matter

-  *Focus beyond vitals—develop solutions for long-term cognitive and behavioral monitoring*



Home is the New Hospital

By 2035, KSA will need 40,000+ long-term care and rehab beds—RPM-enabled homecare solutions are primed to fill that gap

-  *Design solutions that offer post-discharge care, remote vitals, and real-time caregiver alerts*



Regulatory Readiness = Speed to Market

SFDA certifications, CHI mandates, and MoH’s telehealth standards are not just red tape—they’re GTM accelerators

-  *Pre-qualify your tech stack for regulatory fast-tracking before launch*



Smart Pricing Models

Value-based care pricing models (like outcome-linked subscriptions) are gaining traction

-  *Experiment with tiered B2C pricing, SaaS for B2B, and bundled B2B2C models*

*Living with overweight or obesity (>1SD above median WHO weight)
*Living with overweight or obesity (BMI>25kg/m²)