



Sustainable healthcare and global population growth – Future scenarios

Position Paper

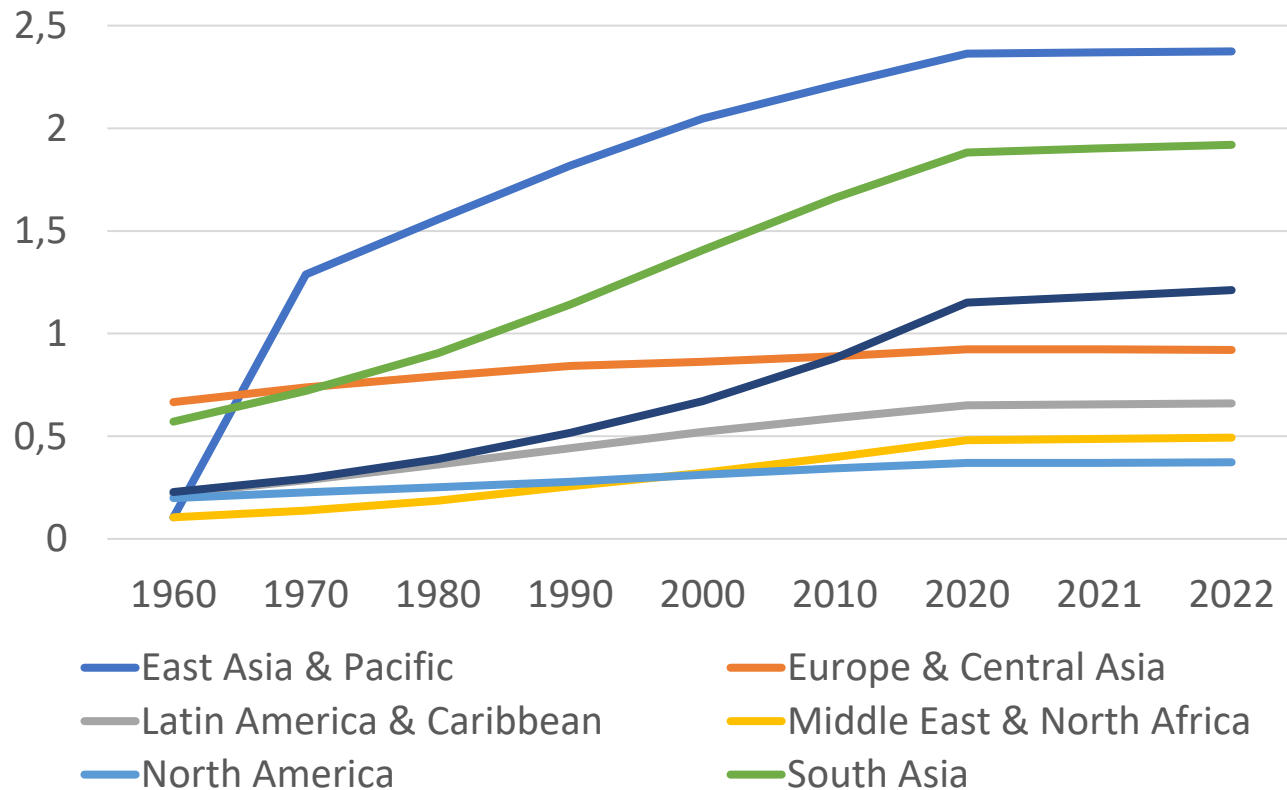
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Introduction

Global population has been rising at a different pace in each region of the world

Population growth
(billions), 1960-2022



Global population has been growing at a fast rate over the last decades and it is expected to keep rising.

According to the UN, world population is projected to increase from 7.9 billion in 2022 to **10.9 billion by 2100**, when it is expected to peak.

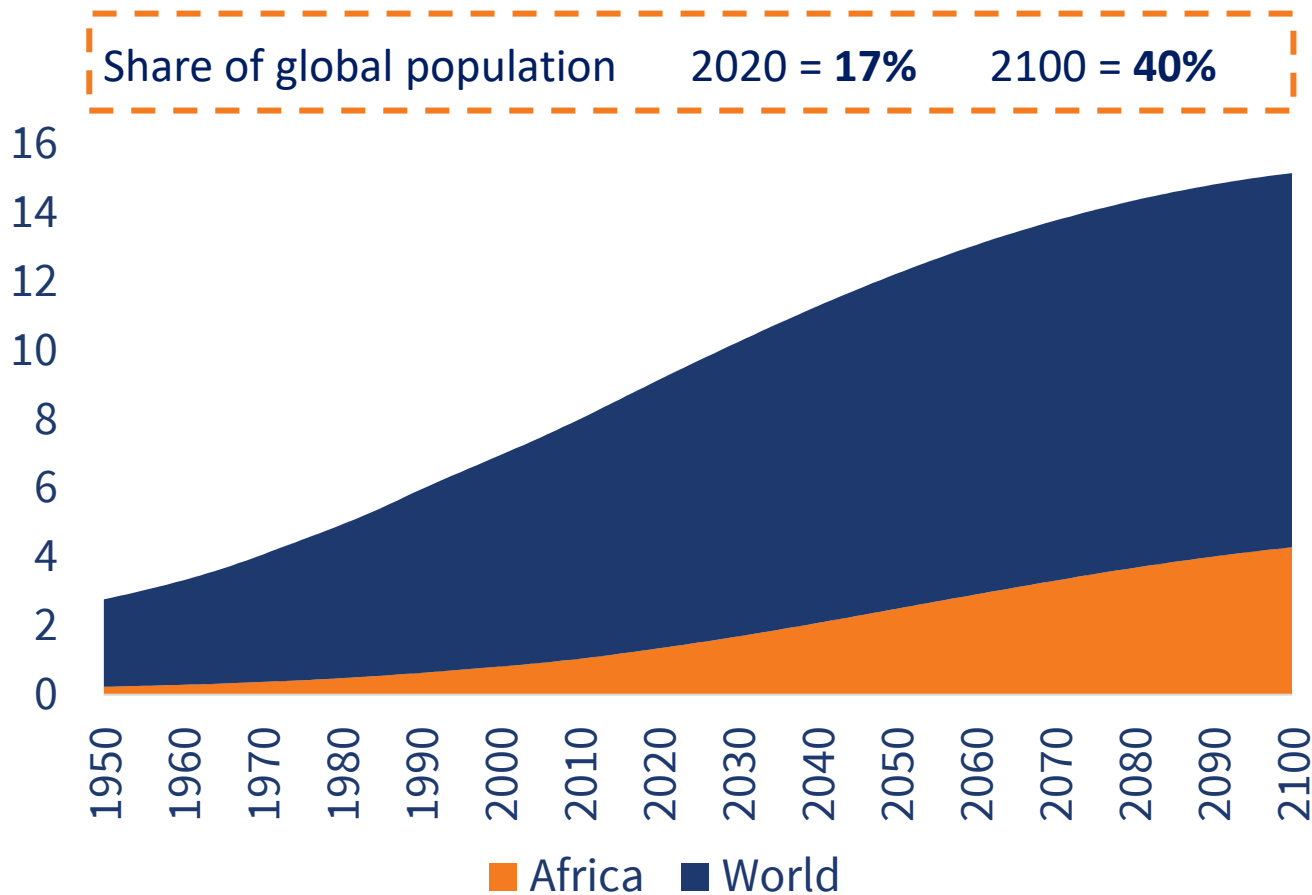


Spotlight on Africa and Europe

Africa's 1.3 billion population is expected to more than triple by 2100, accounting for 40% of global population

- Africa will play an enormous role in global population growth. Currently, its population is about 1.3 billion and by 2100 it is projected to more than triple to **4.3 billion**
- Today, Africa represents just over 17% of the global population; by 2100 this is projected to rise to **40%**

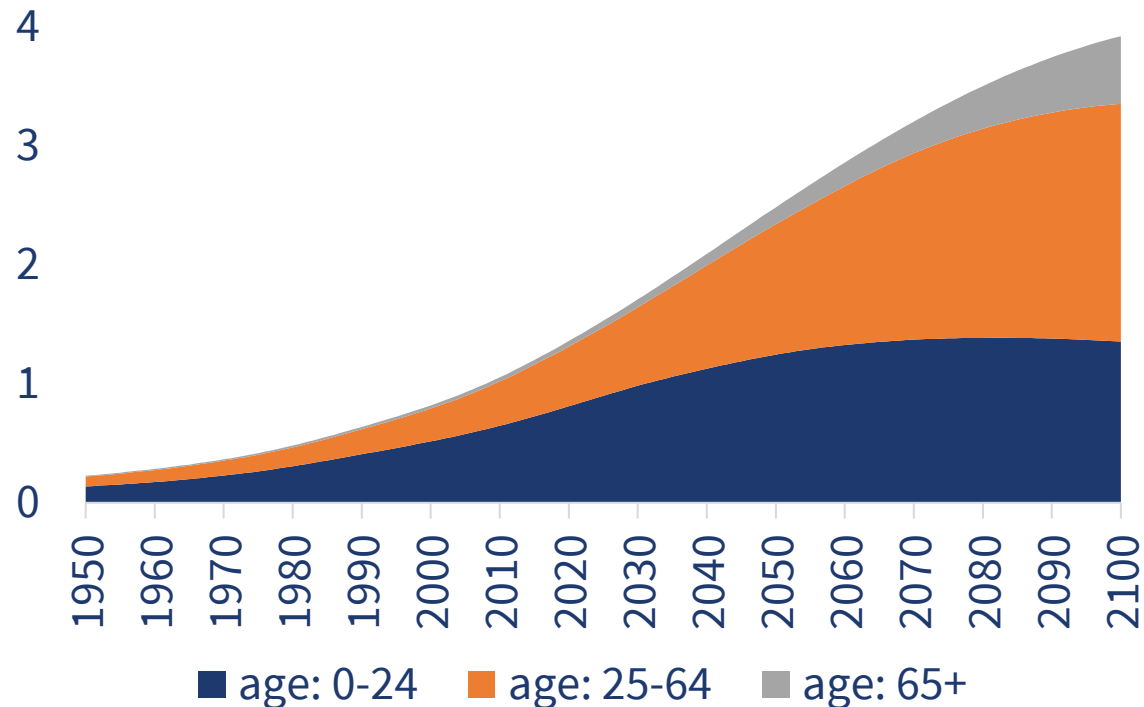
Estimates and projection of population in the world and in Africa (billions), 1950-2100p



While the rest of the world is aging, Africa will become increasingly younger with 94% of its population under 65 by 2050...

- Due to high fertility rates, the share of **population under 25** will increase from 800 million in 2020 to over **1.2 billion** by 2050, accounting for **50%** of the African population
- Between 2020 and 2050, the share of **productive, working-age population aged 25-64** will also increase significantly by 500 million individuals, reaching **1 billion** by 2050, i.e., **44%** of the total African population
- This trend, coupled with rapid urbanization, leave the Continent more exposed and vulnerable to **disease**.

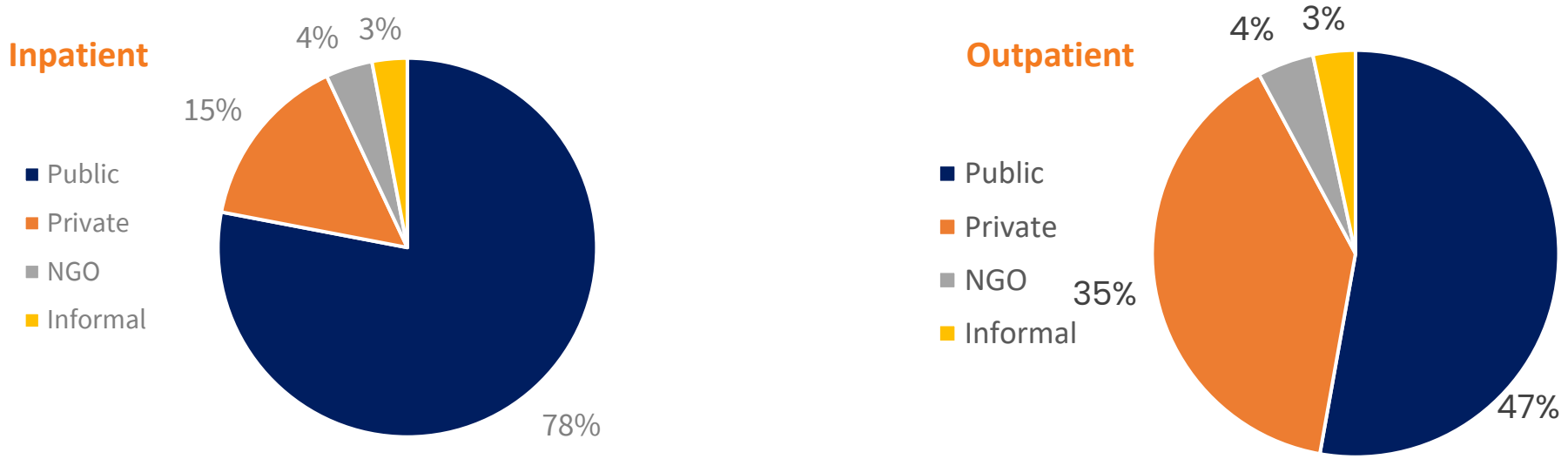
Population in Africa by age bracket
(billions), 1950-2100p



Expanding the African healthcare sector will be a key opportunity to unlock public-private partnerships

The private sector is already playing a relevant role in care-seeking patients, yet it can be a game changer to help bridge the health financing gap of **US\$66 billion per year**. By 2030, business opportunities in the healthcare and wellness sector in Africa are estimated to be worth **\$259 billion**, with the potential to create 16 million jobs.

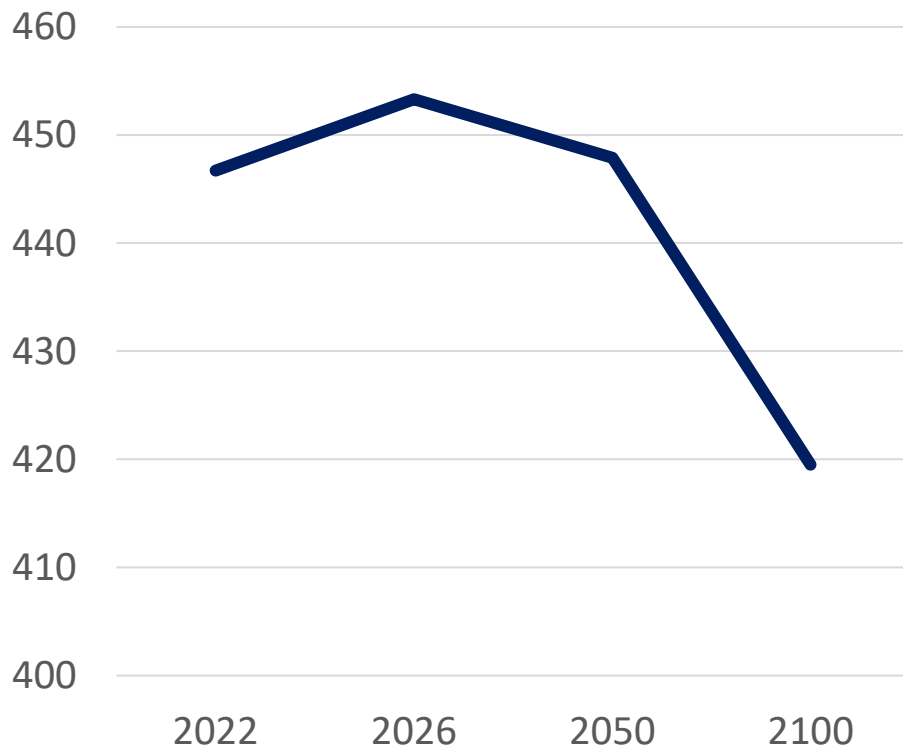
Care-seeking by type of inpatient and outpatient care in Africa, (% of total patients) latest data available



Source: Elaboration by The European House–Ambrosetti on World Health Organization data, 2022.

On the other side, Europe will face rapid ageing population growth, posing a significant burden on the healthcare sector

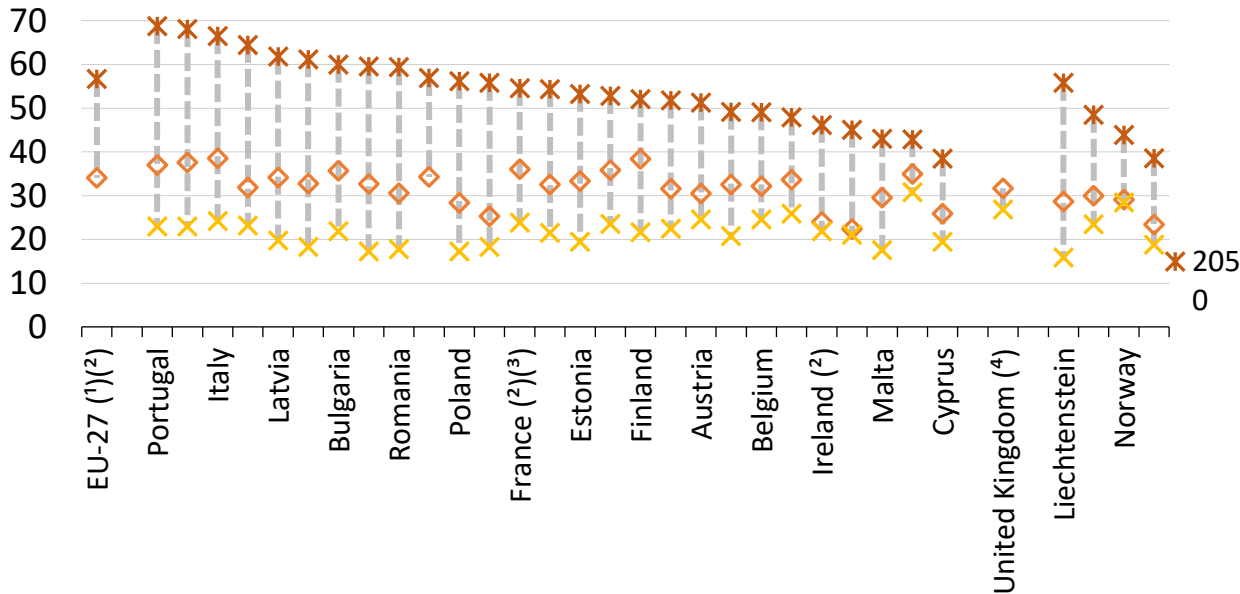
Population growth in Europe
(millions), 2022-2100p



- Projected population in Europe is expected to decrease overtime, with an overall **decrease of 27.3 million (-6.1 %) from 2022 to 2100.**
- The population of **older people** (aged 65 years or more) will increase significantly, rising **from 90.5 million** at the start of 2019 **to reach 129.8 million by 2050.** By the end of the century (**2100**), **more than 30%** of the region's population is expected to be 65 or older.
- At the same time, **there will be 13.5% fewer people aged under 55 years by 2050.**

Over a 50-year period, the old-age dependency ratio in Europe is projected to more than double

Old-age dependency ratio in Europe (%), 1990-2019-2050p



- The old-age dependency ratio expresses the **relative size of the older part of the population compared with the working-age population** to assess the level of support that potentially can be given to older people.
- By 2050, more than two-thirds of EU member states are projected to have an old-age dependency ratio **above 50%: they will have less than 2 persons of working age for every person aged 65 years or more**



Sustainable healthcare

– What scenarios for the near future?

Three mega trends contributing to the future of sustainable and equitable healthcare



Mental health



Digital health



Preventive &
lifestyle medicine

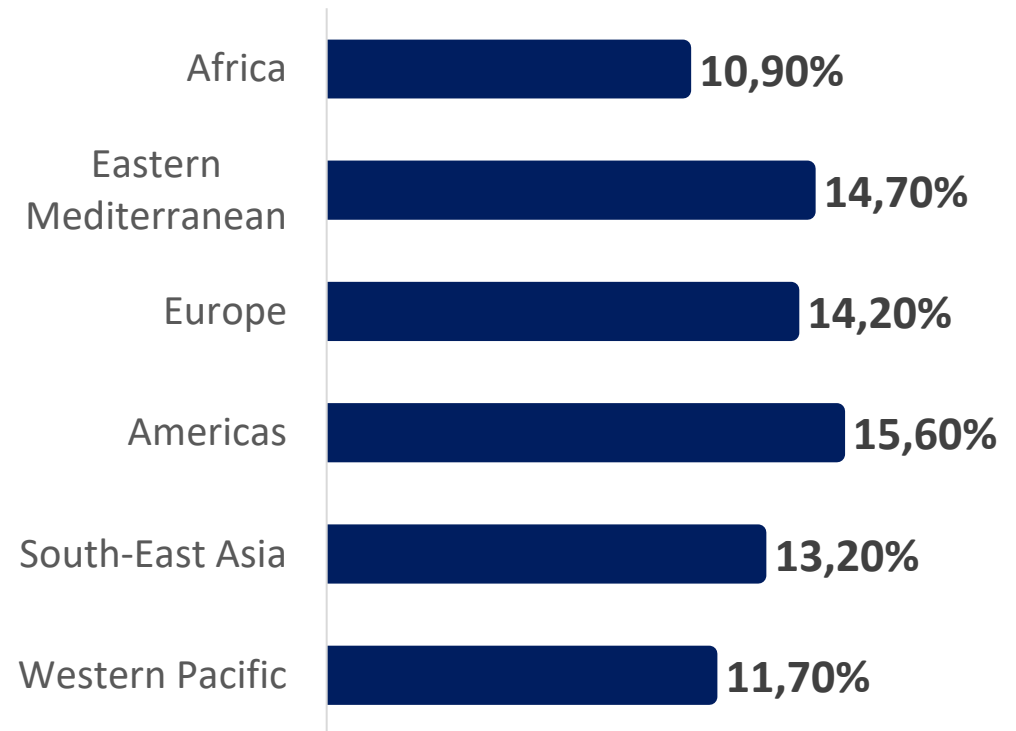
Opportunities for international cooperation

13% of global population (970million people) is living with mental disorders

Mental disorders are common in all countries, yet slight differences between high- and low-income regions can be explained by:

- **Demographic factors:** low-income countries tend to have a higher proportion of children under age ten
- **War and conflict** contribute to the relatively higher rates of mental disorders in the Eastern Mediterranean region
- **Socio-cultural factors:** differing cultural understandings of mental health

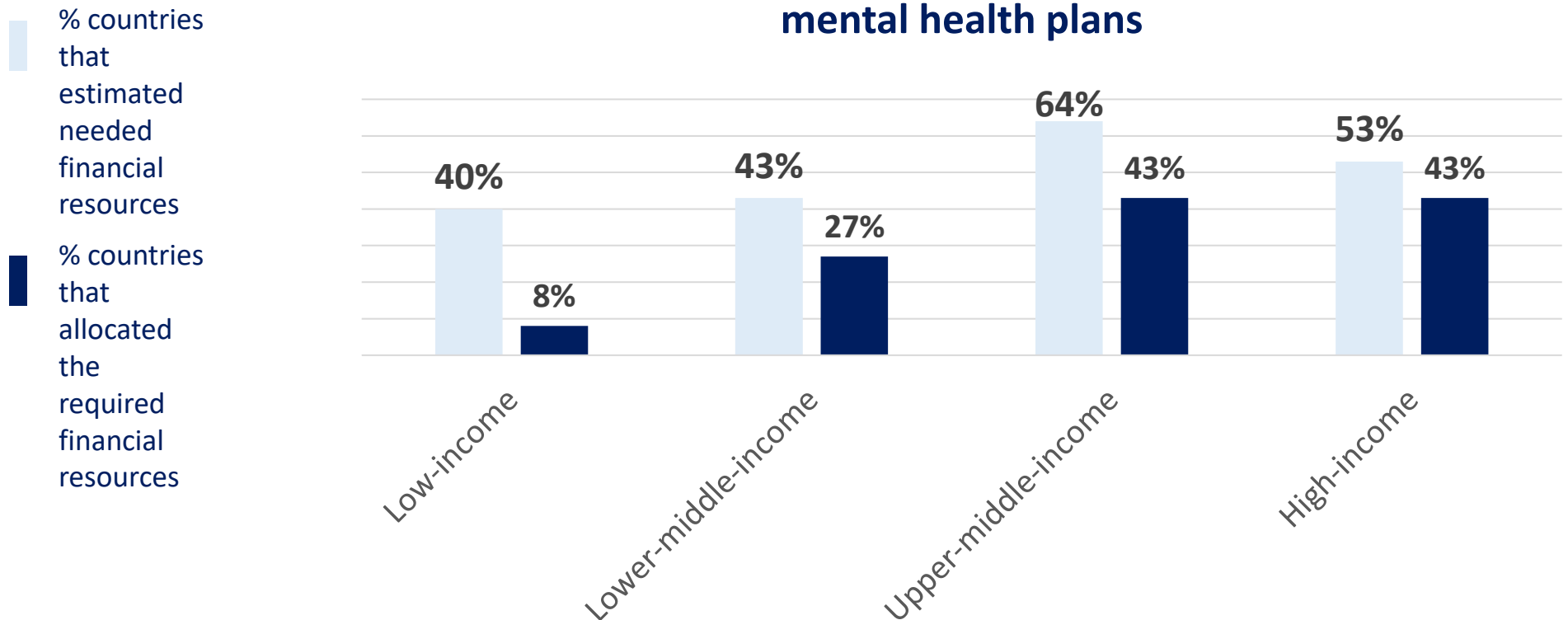
Prevalence of Mental Health Disorders across regions, (%), 2019



Governments around the world allocate just 2% of their health budgets to the treatment and prevention of mental health conditions

According to the World Health Organization, there still are **massive inequalities in the availability of mental health resources** and their allocation between **high- and low-income countries**.

The gap between estimating and allocating resources to implement mental health plans



Harnessing digital technologies to scale up access to care for common mental health conditions

In high-income countries, digital technologies have been able to help people achieve better mental health. Now, these **technologies are becoming more available and affordable** in many countries, and they are increasingly being harnessed to improve mental health, **especially in remote areas** where people are more likely to have access to a mobile phone than mental health care.

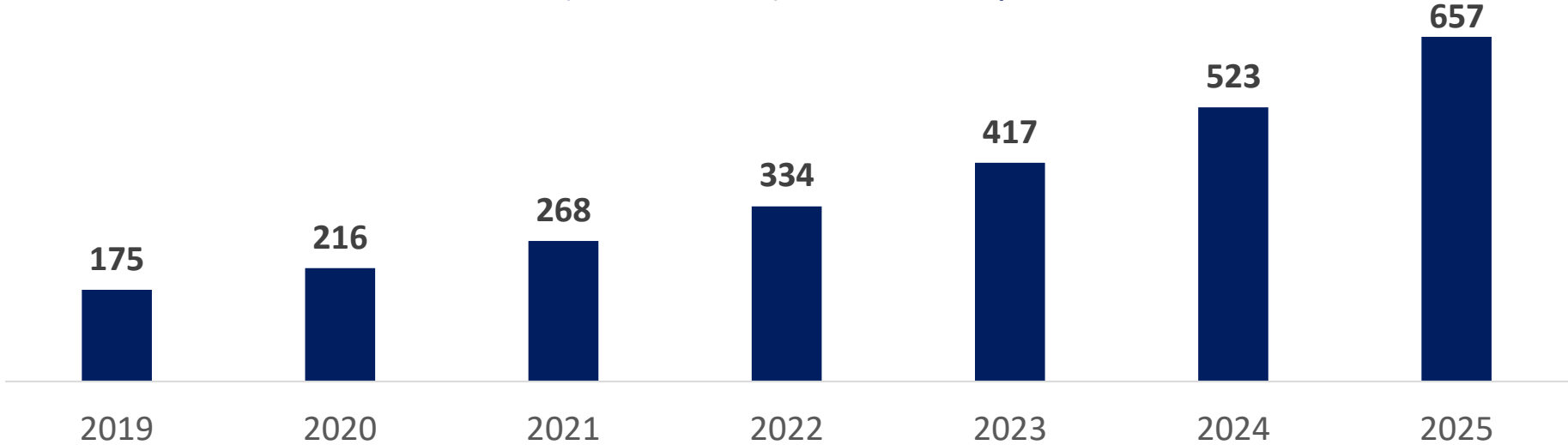
Areas of application of digital technologies to mental health



Digital Technologies – Shaping the future of global health

According to the World Health Organization, there will be a **shortage of about 10 million healthcare workers by 2030**, mostly in low- and lower-middle income countries, making it increasingly challenging to provide care to everyone in need. This suggests coordinated action for the adoption of **digital health solutions**. Forecasts show a sustained growth in the market at a global level.

Projected global digital health market size,
(billion US\$) 2019-2025p



Source: Elaboration by The European House–Ambrosetti on WHO data, 2023

The application of generative AI in healthcare will greatly contribute to achieve progress



Clinical decision-making

Generative AI can analyze data from a patient's medical records, lab results, previous treatments and medical imaging, to identify problem areas and suggest testing or treatment options.



Personalized medication and care

Through data collection, that feed generative AI algorithms, generative AI can analyze and interpret the data and offer tailored recommendations and treatment options.



Pandemic risk prediction

Generative AI models are a vital source of insights when studying the societal-scale effects of catastrophic events (modeling new pandemics and developing preventive measures).



Improved drug discovery

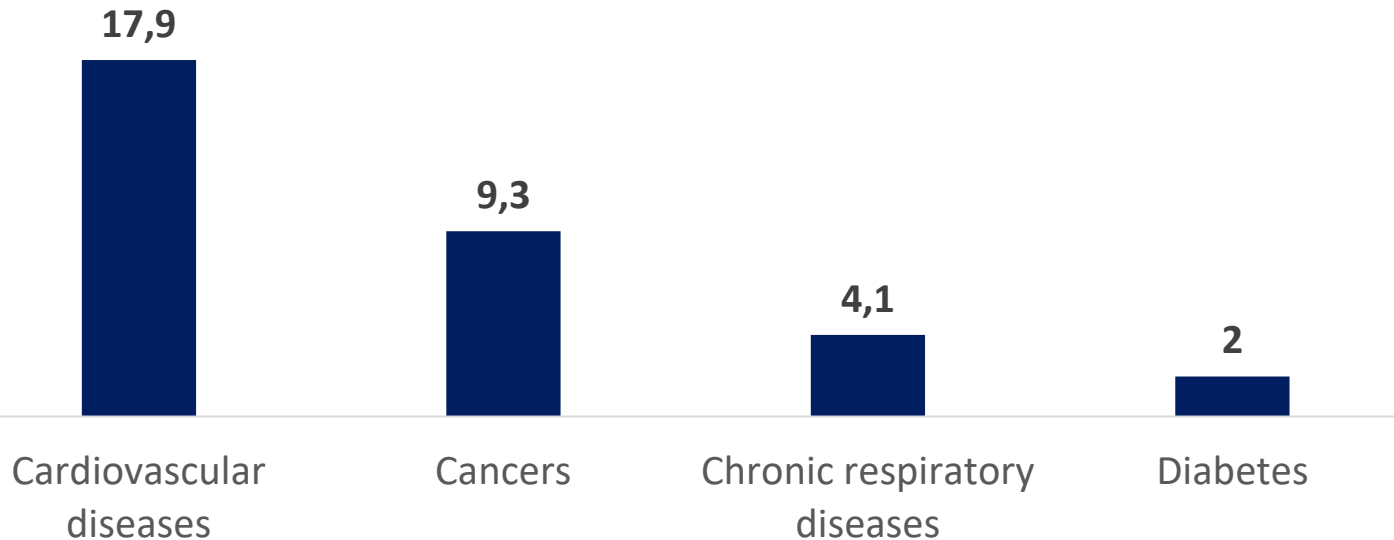
Generative AI shows promising results in drug discovery and development, marking a significant shift for the industry, which has conventionally relied on old-fashioned methods.

The potential of generative AI for revolutionary progress within healthcare is undeniable. The choices made by healthcare providers, practitioners, policymakers and other stakeholders in the coming years will be critical in shaping the evolution of this technology.

Noncommunicable diseases (NCDs) kill 41 million people each year, equivalent to 74% of all deaths globally

Noncommunicable diseases (NCDs), also known as chronic diseases, tend to be of long duration and are the result of a combination of genetic, physiological, environmental and behavioral factors. **NCDs disproportionately affect people in low- and middle-income countries**, where more than three-quarters of global NCD deaths (31.4 million) occur.

Causes of deaths from noncommunicable diseases,
(millions)



These four groups of diseases account for over 80% of all premature NCD deaths.

Prevention and control is key to lessen the impact of NCDs on individuals and society

To lessen the impact of NCDs on individuals and society, a **comprehensive approach** is needed requiring all sectors, including health, finance, transport, education, agriculture, planning and others, to collaborate to reduce the risks associated with NCDs.

Risk factors

- **Unhealthy diet**
- **Physical inactivity**
- **Exposure to tobacco smoke or harmful use of alcohol**
- **Rapid unplanned urbanization**
- **Globalization of unhealthy lifestyles**
- **Aging population**

Potential solutions

- **Detection, screening and treatment of NCDs**, as well as palliative care, are key components of the response to NCDs.
- High impact essential NCD interventions through a **primary health care** approach to strengthen early detection and timely treatment.
- **Public-private partnerships** to invest in screening and control—if provided early to patients, they can reduce the need for more expensive treatment.

Opportunities for public-private cooperation

To sustain progress in the healthcare sector, developing frameworks for public-private cooperation is key

The role of private sector engagement in fostering progress in the healthcare sector is key to ensure that innovation reaches all regions of the globe, providing equitable and sustainable access to healthcare, reducing mortality rates and promoting healthy lifestyles.



The contribution of the **private health** sector constitutes an important component of the healthcare system, **financing innovation and research to sustain progress**.



A stronger inclusion of the private sector can enable dissemination and adherence to **standards of practice for quality, access, transparency of pricing and reporting of care practice**. The improvement of health system governance would provide strategic direction as well as formalize effective public-private engagement.



Under this model, progress towards longer-term health goals, including the United Nations' goal of **Universal Health Coverage** can be attained.



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