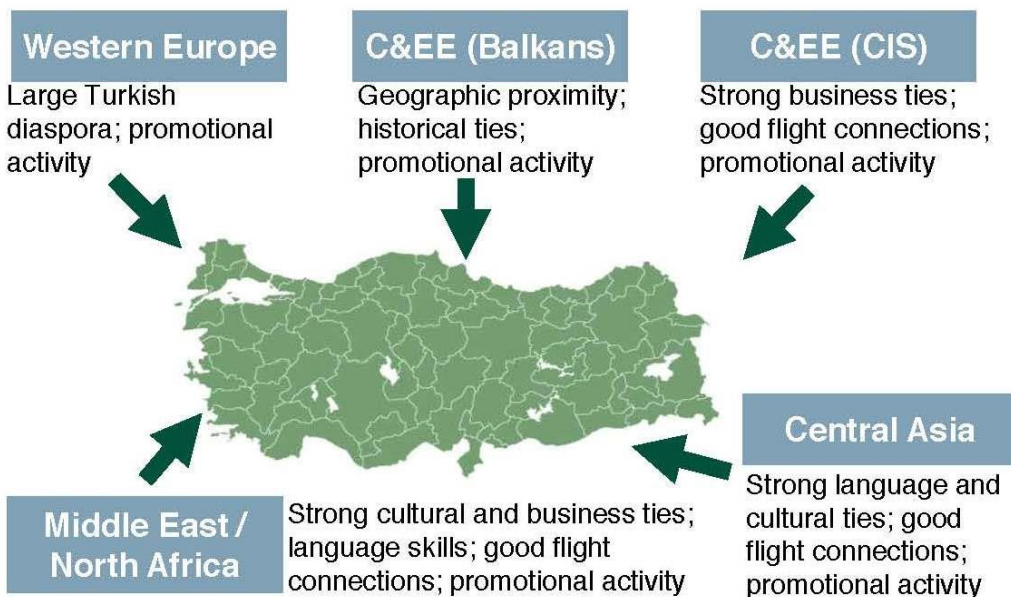


# Sectoral Outlook of Turkey

# Medical Tourism

# Turkey's political and cultural setting makes it a perfect destination for medical tourists from Europe, Central Asia and MENA



- Turkey is able to attract medical tourists from a wide range of countries around the world due to its favourable geopolitical position
  - Turkey has business and/or cultural ties with MENA, central Asian, CIS, Balkan and Western European countries
  - patients from developed countries are typically seeking low-cost alternatives for private-pay procedures, while those from underdeveloped regions of the World look for access to treatment not available in their countries
  - long lasting relationships with Germany and c.4.5m citizens of Turkish origin in Germany places Turkey in a attractive position
- Compared to traditional medical tourist destinations, such as Switzerland, the US or London, Turkey has far more 'economy' positioning ideal for the vast majority of its patient origins
  - in addition, Turkey's growing quality of service and infrastructure is starting to attract patients from developed countries of Western Europe and high-net-worth individuals from the Middle East

# Main Advantages of Turkish Medical Tourism



**Physician, nurse  
and qualified  
human  
resources**



**Turkey's  
geographical  
position**



**State-of-the-art  
medical  
technology and  
infrastructure**



**Ranks 3rd in  
world, in terms  
of JCI  
accredited  
hospitals**



**Tourism- Spill  
over Effect  
Historical, cultural  
attractive  
destination.**



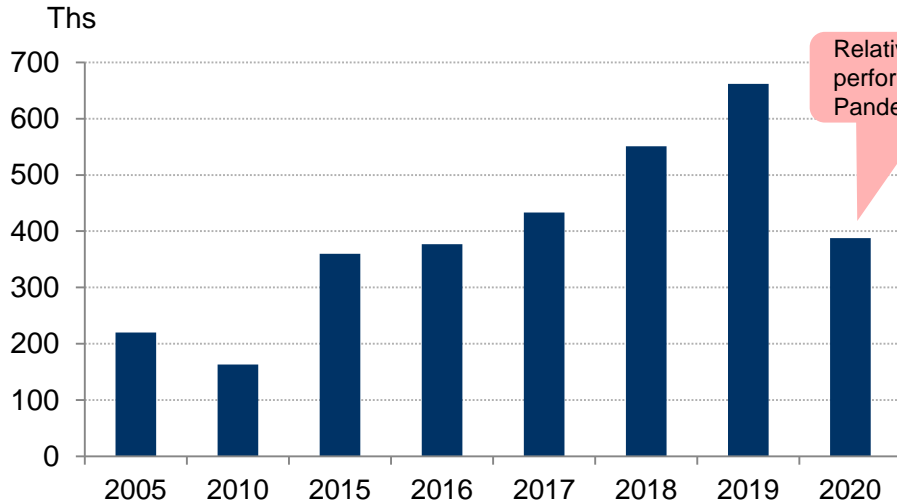
**Reliable and  
consistent  
price**



**Government  
incentives**

# Dynamically developing medical tourism is becoming a significant part of healthcare market, generating annually over \$2 Bn revenue before pandemic

## Incoming Visitors for Medical Purposes



Relatively high performance during Pandemic

- Due to favourable geographical setting, relatively low prices of medical services and marketing of its quality services, Turkey has become one of the major medical tourist destinations in Europe
- medical tourism is strongly supported by the Turkish government, planning to develop the sector into a national champion
- The MoH estimated the Turkish medical tourism market value at over \$2bn in 2023
  - medical tourists on average spend c.\$12k in private and c.\$9k in public providers, with private sector accounting for more than 90% of the volume
- Treatment for cardiovascular diseases, organ transplants, dentistry, and plastic surgery are the most common health services provided by the authorized health providers.

### Popular Treatments

1. Eye operations
2. Oncology
3. Orthopedics
4. Organ Transplantation
5. Plastic Surgery

### Top Incoming Patients by Country of Origin



## Strenghts of Turkish Healthcare Services

- Cardiology & Cardiovascular Surgery (*Adult & Pediatric*)
- Organ Transplantation (*Liver and Kidney Transplantation*)
- Bone Marrow Transplantation (*Autologous, Allogeneic, Haploidentical*)
- Medical, Surgical and Radiation Oncology & Sophisticated Cancer Treatments (*Including Cyberknife, GammaKnife, Truebeam, Rapidarc, Intra-Operative Radiation Therapy*)
- Robotic Surgery (*Gynecology, Urology, General Surgery and Cardiovascular Surgery*)
- Orthopedics & Traumatology
- In Vitro Fertilisation (*Including Pre-Implantation Genetic Diagnosis*)
- Stem Cell Treatments
- Ophthalmology and Dental Treatments

### Promising Treatment «Organ Transplantation»



- Today +150 transplantaion center in Turkey
- 57 organ (kidney) transplantation centers
- Liver transplant centers 30
- Cornea transplant centers stand at 25
- Heart transplantation centers are 12
- Heart valve transplantation centers are 13

**+9500**  
Transplantaion  
in 2019



## Contact

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DEİK was established with this objective in 1986 and adopted a new structure with the Law No. 6552 enacted on 11 September 2014, being further empowered and assuming full responsibility of "managing the foreign economic relations of the Turkish private sector." As the end of 2021, DEİK has 97 founding institutions and 146 business councils, and approximately +1200 member companies which form these councils, as well as 2200 representatives from the member companies.