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Vietnam Clinics Market, By Type (General Clinics, Polyclinics), By Therapy Area (Gynaecology & Obstetrics, General & Sports Physiotherapy, Dermatology, Psychiatry, Orthopedics, Dentistry, Others), By Services (Diagnostic, Consultation, Treatment, Immunization, Pharmacies, Others), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

Vietnam Clinics Market was valued at USD 1.25 Billion in 2024 and is anticipated to project robust growth in the forecast period with a CAGR of 9.85% through 2030. Vietnam's clinic market is undergoing rapid expansion, fueled by rising healthcare demand, increased private-sector investment, and a surge in medical tourism. The sector is benefiting from a growing middle class, accelerated urbanization, and shifting patient preferences, which are driving significant structural transformation. As a result, Vietnam is emerging as a critical hub for outpatient medical services in Southeast Asia.

The market is set on a strong growth trajectory, underpinned by higher disposable incomes, government-led healthcare reforms, and rising demand for specialized treatments. Despite regulatory hurdles and workforce shortages, the industry is evolving with digital health integration, expanded private-sector participation, and the development of advanced specialty clinics.

Southern Vietnam, particularly Ho Chi Minh City and surrounding provinces, remains the epicenter of private healthcare expansion, attracting domestic and international investments. As the sector continues to scale, clinics are focusing on enhancing service

quality, integrating advanced medical technology, and expanding accessibility, making Vietnam a competitive destination for both local and international patients seeking premium healthcare solutions.

Key Market Drivers

Growing Urbanization and Changing Demographics

Vietnam’s rapid urbanization and evolving demographic landscape are playing a crucial role in driving the expansion of the country’s clinics market. In 2022, Vietnam's urban population reached 37.4 million, accounting for 37.55% of the total population. Despite ongoing urban development, the country’s urbanization rate remains relatively low compared to neighboring Asian nations. These factors are reshaping healthcare demand patterns, creating opportunities for both domestic and international healthcare providers to establish and expand clinical services. The following key aspects illustrate how urbanization and demographic shifts are influencing the growth of clinics across Vietnam. Vietnam is experiencing a rapid shift from a predominantly rural population to an increasingly urbanized society. Major cities such as Ho Chi Minh City, Hanoi, Da Nang, and Hai Phong are witnessing a surge in population due to rural-to-urban migration. This trend is being driven by industrialization, job opportunities, and improved living standards in urban centers. As of 2021, Vietnam had 868 urban areas, categorized as follows: 2 special-grade urban centers, 22 first-tier cities, 33 second-tier cities, 47 third-tier cities, 90 fourth-tier towns, and 674 fifth-tier settlements.

Key Market Challenges

Regulatory and Licensing Constraints

Vietnam’s healthcare sector is governed by strict regulations and bureaucratic licensing procedures, which pose significant challenges for both domestic and foreign clinic operators. Setting up a new clinic or expanding an existing one requires multiple approvals from various government agencies, often leading to delays. Foreign investors face additional challenges due to unclear legal frameworks governing foreign ownership in the private healthcare sector. Inconsistent enforcement of regulations across different provinces creates operational uncertainty, making it difficult for clinics to standardize services.

Frequent policy shifts and updates to medical regulations require clinics to constantly adapt, increasing operational complexity. Compliance with import regulations for medical equipment is particularly challenging, as high tariffs and lengthy approval processes delay the adoption of advanced medical technologies. Limited clarity in insurance reimbursement policies makes it difficult for private clinics to attract insured patients, reducing their potential market reach.

Restricts foreign investment and limits the entry of international healthcare providers. Increases the cost and time required to establish and expand private clinics. Creates barriers to innovation, as clinics struggle to integrate new medical technologies due to compliance hurdles.

Key Market Trends

Rise of Integrated Healthcare Ecosystems

Vietnam’s healthcare industry is shifting towards integrated healthcare ecosystems, where clinics, hospitals, pharmacies, and diagnostic centers operate within interconnected networks to provide seamless patient experiences. Private healthcare groups are expanding their presence by establishing clinic chains across multiple cities, allowing patients to receive consistent and standardized medical care regardless of location. Investors and healthcare providers are focusing on vertical integration, linking clinics with laboratories, imaging centers, and telehealth services to offer comprehensive healthcare experience. Partnerships between local clinics and international healthcare providers are strengthening Vietnam’s position as a regional healthcare hub.

The focus is shifting from one-time consultations to long-term patient management, where clinics track medical histories, preventive care, and chronic disease management through connected health systems. Clinics are collaborating with insurance providers and wellness programs, enabling patients to access tailored healthcare plans and subscription-based medical services. Home healthcare services are becoming a part of the ecosystem, where in-home diagnostics, remote monitoring, and follow-up care reduce the burden on hospital infrastructure. Creates scalable business models that increase patient retention and loyalty. Encourages investment in clinic chains and healthcare franchises, leading to sector-wide standardization. Improves healthcare accessibility and efficiency, attracting a wider patient base.

Key Market Players

- TE Healthcare (TE Asia Healthcare Partners)

Raffles Medical Group (International SOS)

Hanoi Family Medical Practice

Dr. Binh Tele_Clinic

Columbia Asia International Clinic-Saigon

CarePlus International Clinic

Lotus Clinic

Victoria Healthcare Vietnam

Centre Medical International

Kim's Eye & Dasom Polyclinic

Report Scope:

In this report, the Vietnam Clinics Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Vietnam Clinics Market, By Type:

General Clinics

Polyclinics

Vietnam Clinics Market, By Therapy Area:

Gynaecology & Obstetrics

General & Sports Physiotherapy

Dermatology

Psychiatry

Orthopedics

Dentistry

Others

Vietnam Clinics Market, By Services:

Diagnostic

Consultation

Treatment

Immunization

Pharmacies

Others

Vietnam Clinics Market, By Region:

Northern Vietnam

Central Vietnam

Southern Vietnam

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Vietnam Clinics Market.

Available Customizations:

Vietnam Clinics market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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