

# **Vietnam Diagnostic Imaging Market By Type (X-Ray Imaging Solutions, Ultrasound Systems, MRI Systems, CT Scanners, Nuclear Imaging Solutions, Mammography, Others), By Mobility (Portable and Standalone), By Source (Domestic and Import), By Application (Cardiology, Oncology, Neurology, Orthopedics, Gastroenterology, Gynecology, Others), By End User (Hospitals & Clinics, Diagnostic Centers, Ambulatory Care Centers, Others), By Region, Competition, Forecast and Opportunities, 2019-2029F**

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## **Abstracts**

Vietnam Diagnostic Imaging Market was valued at USD 201.04 Million in 2023 and is anticipated to project impressive growth in the forecast period with a CAGR of 5.20% through 2029. The Vietnam Diagnostic Imaging Market is being primarily driven by several key factors. There is a growing prevalence of chronic diseases and age-related conditions in Vietnam, leading to an increased demand for diagnostic imaging services to facilitate early detection, accurate diagnosis, and effective treatment. Additionally, rising healthcare expenditure and investments in healthcare infrastructure are fueling the expansion of diagnostic imaging facilities across the country, particularly in urban areas. Moreover, technological advancements in diagnostic imaging modalities, such as X-ray, ultrasound, computed tomography (CT), magnetic resonance imaging (MRI), and nuclear medicine, are driving the adoption of advanced imaging techniques and improving diagnostic accuracy and efficiency. Furthermore, increasing awareness among healthcare providers and patients about the benefits of early disease detection and preventive healthcare measures is contributing to the growing demand

for diagnostic imaging services in Vietnam. Overall, these factors are propelling the growth of the Vietnam Diagnostic Imaging Market and creating opportunities for manufacturers, healthcare providers, and investors in the healthcare sector.

## Key Market Drivers

### Increasing Prevalence of Chronic Diseases and Age-Related Conditions

Vietnam is experiencing a demographic shift characterized by an aging population and an increasing prevalence of chronic diseases. Factors such as changing lifestyles, urbanization, and improved healthcare access have contributed to the rise in non-communicable diseases (NCDs) like cardiovascular diseases, cancer, and diabetes. As these conditions often require regular monitoring and diagnostic evaluation, there is a growing demand for diagnostic imaging services to facilitate early detection, disease staging, and treatment planning. The expanding elderly population, coupled with the rising burden of chronic diseases, is driving the need for advanced diagnostic imaging modalities such as X-ray, ultrasound, MRI, and CT scans in Vietnam.

### Rising Healthcare Expenditure and Investments in Healthcare Infrastructure

Vietnam has been increasing its healthcare expenditure and making significant investments in healthcare infrastructure to improve healthcare access, quality, and affordability. The government's focus on healthcare reform and development initiatives has led to the expansion of healthcare facilities, including hospitals, clinics, diagnostic centers, and medical laboratories, across the country. This expansion of healthcare infrastructure is driving the demand for diagnostic imaging equipment and services, as healthcare providers seek to enhance their diagnostic capabilities, improve patient care, and meet the growing healthcare needs of the population.

### Technological Advancements in Diagnostic Imaging Modalities

Technological advancements in diagnostic imaging modalities have revolutionized the field of medical imaging, enabling healthcare providers to obtain detailed anatomical and functional information for accurate diagnosis and treatment planning. Advanced imaging techniques such as digital radiography, 3D/4D ultrasound, multi-slice CT, high-field MRI, and PET-CT have become increasingly accessible in Vietnam, offering superior image quality, faster scan times, and enhanced diagnostic capabilities. These technological innovations not only improve diagnostic accuracy and efficiency but also enable early detection of diseases, reduce radiation exposure, and enhance

patient comfort and safety. The adoption of advanced diagnostic imaging modalities is driven by the desire to provide high-quality healthcare services, attract patients, and stay competitive in the rapidly evolving healthcare landscape of Vietnam.

### Growing Awareness and Demand for Preventive Healthcare Services

There is a growing awareness among healthcare providers and patients in Vietnam about the importance of preventive healthcare measures and early disease detection. With increasing emphasis on disease prevention, health promotion, and lifestyle modifications, there is a rising demand for preventive healthcare services, including screening and diagnostic imaging. Patients are proactively seeking preventive health check-ups, screening tests, and diagnostic evaluations to detect diseases at an early stage when they are more treatable. Diagnostic imaging plays a crucial role in preventive healthcare by enabling early detection of abnormalities, facilitating timely intervention, and improving patient outcomes. The growing demand for preventive healthcare services is driving the uptake of diagnostic imaging services in Vietnam, leading to increased utilization of imaging modalities for screening, surveillance, and health monitoring purposes.

### Key Market Challenges

#### Infrastructure and Equipment Accessibility

One of the primary challenges in the Vietnam Diagnostic Imaging Market is the limited accessibility to advanced diagnostic imaging infrastructure and equipment, particularly in rural and remote areas. While major cities and urban centers have access to state-of-the-art imaging facilities, including MRI, CT, and PET-CT scanners, many rural regions lack such resources. The uneven distribution of imaging equipment across the country poses challenges in delivering timely and equitable healthcare services to underserved populations. Limited infrastructure and equipment availability hinder early diagnosis, disease monitoring, and treatment planning for patients residing in remote areas, exacerbating healthcare disparities and impacting patient outcomes.

#### Shortage of Skilled Healthcare Professionals

The shortage of skilled healthcare professionals, including radiologists, radiologic technologists, and medical physicists, poses a significant challenge in the Vietnam Diagnostic Imaging Market. Despite the increasing demand for diagnostic imaging services, there is a scarcity of trained professionals with expertise in operating and

interpreting imaging modalities. The inadequate workforce capacity limits the availability of diagnostic imaging services, delays diagnosis and treatment, and compromises the quality of patient care. Addressing the shortage of skilled healthcare professionals requires investment in education and training programs, recruitment and retention initiatives, and capacity-building efforts to enhance the diagnostic imaging workforce in Vietnam.

## Key Market Trends

### Expanding Private Healthcare Sector and Medical Tourism

The expansion of the private healthcare sector and the growth of medical tourism in Vietnam are contributing to the demand for diagnostic imaging services. Private hospitals, clinics, and diagnostic centers are investing in state-of-the-art imaging equipment and facilities to attract patients seeking high-quality healthcare services. These facilities offer a wide range of diagnostic imaging modalities, personalized care, and shorter wait times, making them appealing to both domestic and international patients. Medical tourists from neighboring countries such as Laos, Cambodia, and Myanmar, as well as expatriates living in Vietnam, often seek diagnostic imaging services as part of their healthcare experience. The increasing demand from the private healthcare sector and medical tourists is driving the growth of the diagnostic imaging market in Vietnam.

### Government Initiatives to Expand Access to Healthcare Services

The Vietnamese government has been implementing various initiatives to expand access to healthcare services and improve healthcare outcomes across the country. These initiatives include the development of rural healthcare networks, the expansion of health insurance coverage, and the establishment of telemedicine and e-health platforms. As part of these efforts, the government is investing in the procurement of medical equipment, including diagnostic imaging systems, to enhance healthcare infrastructure in rural and underserved areas. Additionally, government-sponsored healthcare programs and screening campaigns are driving the demand for diagnostic imaging services, particularly in remote regions where access to healthcare is limited. The government's commitment to expanding access to healthcare services is expected to fuel the growth of the diagnostic imaging market in Vietnam.

## Segmental Insights

## Type Insights

Based on the type, X-Ray Imaging Solutions and Ultrasound Systems emerge as the dominant modalities, owing to their widespread availability, versatility, and cost-effectiveness. X-ray imaging, a fundamental diagnostic tool, remains the cornerstone of medical imaging in Vietnam, serving as the primary modality for various applications, including skeletal imaging, chest radiography, and trauma assessment. X-ray systems are widely deployed across healthcare facilities, from primary care clinics to tertiary hospitals, due to their affordability, ease of use, and rapid image acquisition capabilities. Moreover, X-ray imaging solutions are indispensable for screening, diagnosis, and treatment monitoring across a broad spectrum of medical specialties, ranging from orthopedics and pulmonology to emergency medicine and pediatrics. As the healthcare infrastructure continues to expand, technological advancements continue to evolve, and healthcare standards continue to improve, the role of various imaging modalities in the Vietnam Diagnostic Imaging Market is expected to evolve, with opportunities for growth and innovation in the years to come.

## End User Insights

Based on the end user segment, Hospitals & Clinics emerge as the dominant providers of diagnostic imaging services, playing a central role in meeting the healthcare needs of the population. Hospitals, ranging from large tertiary care centers to smaller community hospitals, serve as primary hubs for diagnostic imaging services, offering a comprehensive range of imaging modalities to support clinical diagnosis, treatment planning, and patient care across various medical specialties. These facilities house state-of-the-art imaging equipment, including X-ray machines, ultrasound systems, MRI scanners, CT scanners, and nuclear medicine cameras, enabling them to provide a wide array of imaging services to patients.

Hospitals & Clinics benefit from their multidisciplinary approach to healthcare delivery, with imaging services integrated into broader patient care pathways. Radiologists, radiologic technologists, and other healthcare professionals collaborate closely with physicians, surgeons, and specialists to interpret imaging studies, provide diagnostic insights, and facilitate optimal patient management. Additionally, hospitals often have specialized departments or centers dedicated to specific imaging modalities or clinical specialties, such as oncology imaging centers, cardiovascular imaging labs, and women's health centers, further enhancing the breadth and depth of diagnostic imaging services available to patients.

## Regional Insights

In the Vietnam Diagnostic Imaging Market, the South region emerges as the dominant region, spearheading the country's diagnostic imaging landscape. Comprising major cities such as Hanoi, Ho Chi Minh City, Can Tho, and Vung Tau, the South region serves as the epicenter of healthcare innovation, technological advancement, and medical infrastructure development in Vietnam. Ho Chi Minh City, the largest city in Vietnam and the economic powerhouse of the country, anchors the South region's prominence in the diagnostic imaging market. The city boasts a dense network of hospitals, clinics, diagnostic centers, and medical institutions, equipped with state-of-the-art imaging facilities and cutting-edge technologies. These healthcare facilities cater to a diverse patient population, offering a comprehensive range of diagnostic imaging services, including X-ray, ultrasound, MRI, CT, and nuclear medicine imaging.

Ho Chi Minh City serves as a hub for medical tourism and healthcare investment, attracting patients from across Vietnam and abroad seeking advanced diagnostic evaluations, specialized treatments, and quality healthcare services. The city's strategic location, modern infrastructure, and vibrant healthcare ecosystem make it a preferred destination for patients seeking diagnostic imaging services, driving the growth of the diagnostic imaging market in the South region.

## Key Market Players

Philips Electronics Vietnam Ltd

Siemens Healthcare Ltd

Neusoft Medical Systems Vietnam

FUJIFILM VIETNAM Co., Ltd.

Shimadzu Vietnam Co., Ltd.

IDS Medical Systems Vietnam Ltd.

MediGroup Asia Ltd.

Lab Group International Vietnam Company Limited

HORIBA Vietnam Company Limited

Nam Cuong Medical Technology Company Limited

### Report Scope:

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

#### Vietnam Diagnostic Imaging Market, By Type:

X-Ray Imaging Solutions

Ultrasound Systems

MRI Systems

CT Scanners

Nuclear Imaging Solutions

Mammography

Others

#### Vietnam Diagnostic Imaging Market, By Mobility:

Portable

Standalone

#### Vietnam Diagnostic Imaging Market, By Source:

Domestic

Import

### Vietnam Diagnostic Imaging Market, By Application:

Cardiology

Oncology

Neurology

Orthopedics

Gastroenterology

Gynecology

Others

### Vietnam Diagnostic Imaging Market, By End User:

Hospitals & Clinics

Diagnostic Centers

Ambulatory Care Centers

Others

### Vietnam Diagnostic Imaging Market, By Region:

South Vietnam

North Vietnam

Central Vietnam

### Competitive Landscape

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



### Available Customizations:

Vietnam Diagnostic Imaging Market report with the given market data, Tech Sci 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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