

Vietnam Health Check-up Market, By Type (General Health Check-up, Preventive Health Check-up, Specialized Health Check-up, Routine & Wellness Check-up), By Test Type (Blood Glucose Tests, Kidney Function Tests, Bone Profile, Electrolytes, Liver Function Tests, Lipid Profile, Cardiac Biomarkers, Special Biochemistry, Hormones & Vitamins, Tumor Biomarkers, Others), By Application (Cardiovascular Diseases, Metabolic Disorders, Cancer, Inflammatory Conditions, Musculoskeletal Disorders, Neurological Conditions, Other), By Service Providers (Hospital-Based Laboratories, Central Laboratories, Stand-Alone Laboratories), By End User (Enterprise, Individuals), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

Vietnam Health Check-up Market was valued at USD 329.95 Million in 2024 and is anticipated to project impressive growth in the forecast period with a CAGR of 6.25% through 2030. The Vietnamese health check-up market is witnessing robust expansion, primarily fueled by heightened health consciousness, the growing incidence of chronic conditions, and proactive government policies aimed at bolstering preventive care. The increasing recognition among the Vietnamese population of the critical role regular health screenings play in early detection and disease prevention is accelerating market

growth. Additionally, the integration of digital health solutions, such as telemedicine and online consultations, is significantly improving both the accessibility and efficiency of health check-up services. However, a critical challenge remains the scarcity of qualified healthcare professionals in certain regions, which could hinder the delivery and quality of these services.

Key Market Drivers

Increasing Health Awareness

The increasing health awareness among the Vietnamese population is a pivotal driver behind the growth of the health check-up market in Vietnam. This rising consciousness is influencing individuals to prioritize their health and well-being, particularly through preventive healthcare measures such as regular health screenings. This trend is becoming more prominent across various segments of the population, from urban professionals to rural communities, and is significantly shaping market dynamics. As individuals become more informed about the risks associated with undiagnosed health conditions, there is a noticeable shift in behavior towards preventive care rather than reactive treatments. In the past, healthcare in Vietnam was predominantly sought in response to illness. However, as people increasingly recognize the importance of early detection in preventing serious health issues, demand for routine health check-ups has surged. This shift not only encourages a more health-conscious society but also prompts individuals to invest in health check-up packages offered by both private and public healthcare providers. A significant aspect of the increasing health awareness is the growing concern over lifestyle-related diseases, such as obesity, diabetes, hypertension, and cardiovascular conditions. As these diseases have become more prevalent due to changing diets, sedentary lifestyles, and stress, the public is more inclined to undergo regular screenings to detect these conditions early. Health check-ups that focus on diagnosing these prevalent issues are in high demand, contributing to the overall market growth. Health awareness campaigns, coupled with media coverage on the dangers of such diseases, play a central role in reinforcing this mindset shift. Vietnam, a country with a rich history and dynamic culture, has made notable advancements in its healthcare system over the past few decades. The country's life expectancy has risen from 72.91 years in 2000 to an expected 75.91 years in 2024, reflecting significant improvements in public health outcomes.

Government-led health awareness programs are integral in educating the population about the benefits of regular check-ups. Campaigns emphasizing the importance of preventive healthcare, early disease detection, and regular screenings are creating a

culture of health consciousness. In addition, private healthcare providers are leveraging marketing strategies to promote awareness about the services they offer. Educational initiatives, such as advertisements, seminars, and partnerships with local organizations, further drive public interest in maintaining good health through proactive health check-ups. With rising health awareness, there is a growing recognition that early detection of diseases can lead to more effective treatment outcomes and reduce long-term healthcare costs. This realization is prompting more individuals to seek out health check-ups as a way to assess and manage their health risks proactively. Health check-ups are no longer seen merely as a diagnostic tool, but as an integral component of a strategy for maintaining long-term health. This proactive approach, fueled by awareness, is fostering sustained demand for comprehensive health check-up services.

In the digital age, information about health and wellness is more accessible than ever before. With the rise of the internet, social media, and mobile health apps, individuals are becoming more knowledgeable about the significance of maintaining their health. This access to a wealth of information has empowered consumers to make more informed decisions about their health. As a result, people are increasingly seeking health check-ups as a means of managing their well-being. Healthcare providers are also tapping into this trend by offering easy-to-understand resources and health check-up information online to educate and attract potential customers. As Vietnam's middle class continues to expand, a growing number of individuals have the financial capacity to prioritize their health. This economic shift has also led to changes in lifestyle, including greater emphasis on wellness and longevity. Individuals are more willing to invest in preventive health measures, including routine health screenings, as they see these services as an investment in their future health. The greater disposable income of this demographic is helping to drive demand for both general and specialized health check-up services, particularly among urban populations.

Rising Prevalence of Chronic Diseases

The rising prevalence of chronic diseases in Vietnam is a critical factor driving the expansion of the health check-up market. As the incidence of conditions such as diabetes, hypertension, cardiovascular diseases, and cancer continues to rise, there is an increased demand for regular health check-ups as a preventive measure, early detection tool, and management strategy. This growing burden of chronic diseases has profound implications for healthcare practices in Vietnam, contributing directly to the increased adoption of health screening services. Chronic diseases, by their nature, often develop gradually and can remain undiagnosed until they reach advanced stages, making early detection essential for effective treatment and management. As chronic

diseases like diabetes and hypertension become more widespread in Vietnam, there is a heightened focus on the importance of early detection through regular health check-ups. Individuals are increasingly seeking routine screenings to identify risk factors such as elevated blood pressure, cholesterol levels, or glucose levels, allowing for early intervention before conditions worsen. This growing demand for preventive care is a key driver of the health check-up market, as people realize that timely detection can significantly improve long-term health outcomes. The leading causes of death included stroke, ischemic heart disease, diabetes, chronic obstructive pulmonary disease (COPD), and lung cancer. The country also saw a rise in cancer incidence, with 165,000 new cases reported in 2018, up from 126,000 in 2010. Vietnam is ranked among the top 10 countries with the highest burden of tuberculosis (TB), yet it lacks adequate infrastructure to effectively combat the disease. According to USAID, while over 170,000 people contract tuberculosis annually, fewer than 60% receive the necessary treatment.

Chronic diseases often lead to long-term healthcare costs due to the need for ongoing medical treatment and management. As the population ages and the burden of chronic diseases increases, both individuals and the healthcare system are recognizing the importance of preventive measures to reduce future healthcare expenditures. Regular health check-ups are viewed as an investment in reducing the overall financial burden of chronic disease by identifying potential health risks early and enabling timely intervention. Preventive screenings allow for cost-effective management of chronic diseases, as addressing issues before they escalate can reduce the need for expensive emergency treatments and long-term care. The rise in chronic diseases is closely tied to shifting lifestyle patterns, such as poor diet, sedentary behavior, and increasing stress. As these risk factors become more prevalent, there is a growing recognition among the Vietnamese population of the need to adopt healthier lifestyles and monitor their health more closely. The realization that lifestyle changes can mitigate the risk of chronic diseases has spurred an interest in regular check-ups as a means of proactively managing one's health. Furthermore, individuals diagnosed with conditions such as diabetes or high blood pressure are now more inclined to undergo regular screenings to monitor their disease progression and prevent complications, creating an ongoing demand for health check-ups.

The Vietnamese government has increasingly focused on addressing the public health challenges posed by the rising prevalence of chronic diseases. National healthcare programs, campaigns, and initiatives aimed at reducing the burden of chronic conditions emphasize the importance of regular health check-ups as part of a broader strategy to combat non-communicable diseases (NCDs). Non-communicable diseases (NCDs)

were responsible for 81% of deaths in Vietnam in 2019, according to the World Health Organization (WHO). Government-backed health education campaigns raise awareness about the early signs of chronic diseases and the benefits of regular screenings. Public health policies that promote preventive care are instrumental in driving consumer behavior toward more frequent health check-ups, particularly for individuals at higher risk of chronic diseases. Vietnam's population is aging, leading to a higher incidence of chronic diseases associated with older age, such as cardiovascular conditions, arthritis, and certain types of cancer. The increasing life expectancy, coupled with the rise in age-related chronic health issues, is driving demand for regular health check-ups. Older individuals are more likely to suffer from multiple chronic conditions (comorbidities), which necessitate continuous monitoring and management through health screenings. As the population ages, there is a greater focus on managing chronic diseases holistically, further contributing to the demand for comprehensive health check-up services.

Growth of the Middle-Class Population

The growth of Vietnam's middle-class population is a significant driver of the expansion of the health check-up market. As the country's economy continues to develop, the middle class is increasing in both size and affluence. Vietnam's middle and affluent class has experienced substantial growth in recent years. By 2024, households with annual incomes of USD13,450 or more are projected to account for nearly 20% of the population, up from 12% in 2019. This demographic shift is reshaping consumption patterns and driving demand for higher-quality healthcare services, including routine health check-ups. Several factors contribute to how the growing middle class is stimulating the health check-up market in Vietnam. The expanding middle class is accompanied by rising disposable incomes, allowing a larger segment of the population to access healthcare services that were previously out of reach. As more people achieve financial stability, there is a growing willingness to spend on preventive care, including regular health check-ups. Health check-ups, once seen as a luxury, are now viewed as an essential part of maintaining overall well-being. The increased purchasing power enables individuals to opt for premium health services, including comprehensive and specialized check-up packages offered by private healthcare providers. This shift toward consumer-driven healthcare is directly boosting the market for health check-up services.

With the rise of the middle class, there is a heightened demand for high-quality healthcare. People are no longer just seeking basic medical treatment but are looking for advanced, personalized services. This trend extends to preventive healthcare, where

Individuals now seek health check-ups that offer more than just standard assessments. The middle class is more likely to invest in comprehensive packages that include screenings for chronic diseases, cancer, and genetic testing, among other specialized services. The growth in demand for higher-quality, customized health check-ups is pushing healthcare providers to innovate and expand their offerings, further propelling market growth. As the middle class becomes more health-conscious, there is a noticeable shift from reactive treatment to proactive, preventive care. The middle class is increasingly aware of the long-term benefits of early detection and disease prevention. Health check-ups are now seen not just as a response to illness but as a routine practice to maintain good health and prevent future medical issues. As these individuals have access to information and resources about health risks and preventive measures, they are more inclined to schedule regular check-ups, contributing to sustained demand in the market.

With rising income levels, the middle class is experiencing lifestyle changes, many of which can contribute to health issues, such as sedentary behavior, unhealthy diets, and high stress levels. These factors have led to an increase in lifestyle-related diseases such as diabetes, hypertension, and cardiovascular conditions. As the middle class becomes more aware of the risks associated with these conditions, there is a growing interest in regular health check-ups as a means of monitoring and managing health. This demographic is particularly driven to undergo routine screenings for early signs of chronic diseases to mitigate health risks before they become severe. This shift toward health-conscious living is contributing to the demand for a wide range of health check-up services. Urbanization in Vietnam has led to better access to healthcare services, especially in cities where the majority of the middle class resides. As urban centers continue to expand, healthcare infrastructure has improved, making health check-up services more accessible to a larger population. The middle class, residing predominantly in urban areas, is better positioned to take advantage of modern healthcare facilities, such as private hospitals and specialized clinics, which offer tailored health check-up packages. These areas also see an influx of international healthcare providers, bringing global standards to local healthcare services and further increasing the attractiveness of health check-ups among the middle class.

Key Market Challenges

Limited Healthcare Infrastructure and Regional Disparities

One of the key challenges facing the growth of the health check-up market in Vietnam is the uneven distribution and limited capacity of healthcare infrastructure, particularly

outside major urban centers. While cities such as Hanoi and Ho Chi Minh City have seen significant improvements in healthcare facilities, rural areas and smaller provinces often lack sufficient medical resources and specialized services. This infrastructure gap limits the accessibility of high-quality health check-up services for a large portion of the population.

In many rural areas, residents have to travel long distances to access even basic health screenings, which discourages regular check-ups and preventive healthcare. The shortage of modern diagnostic tools and healthcare facilities in these regions further compounds the issue. Despite the increasing health awareness and demand for health check-ups, individuals in less accessible areas are left with limited options, which stunts the potential market growth in those regions.

Affordability and Insurance Coverage

The affordability of health check-ups remains a significant barrier for a large segment of the Vietnamese population. While the middle class has expanded, a considerable portion of the population, particularly in rural areas, still faces financial constraints when it comes to accessing regular health screenings. Private health check-up services, which are often perceived as more comprehensive and of higher quality, are costly and may be out of reach for many, even within the growing middle class.

Moreover, health insurance coverage for preventive services, such as regular health check-ups, remains limited. While private insurers have begun to offer packages that include health screenings, these services are not yet universally available through government-backed health insurance programs. Many individuals either do not have health insurance or are covered by plans that do not include preventive care. This lack of widespread insurance coverage for routine check-ups creates a financial burden for those who might otherwise benefit from regular screenings, preventing them from seeking timely medical attention.

Key Market Trends

Integration of Digital Health Technologies and Telemedicine

One of the most transformative trends in the Vietnam health check-up market is the integration of digital health technologies and telemedicine into preventive care. The increasing penetration of smartphones, the internet, and wearable health devices has revolutionized the way people approach their health and wellness. These technologies

enable individuals to monitor their health more closely, track key metrics such as blood pressure, glucose levels, and heart rate, and share data with healthcare providers in real-time

Telemedicine platforms are allowing for remote consultations, follow-up appointments, and the interpretation of health check-up results, significantly increasing the accessibility and convenience of preventive healthcare. As more people embrace these digital solutions, health check-ups are becoming more integrated into everyday life. Patients can now receive consultations or even initial screenings remotely, making it easier for individuals, particularly in rural or underserved areas, to access healthcare services. This trend is expected to drive the future growth of the market by bridging the gap between patients and healthcare providers, expanding the reach of health check-up services to previously underserved populations.

Personalized and Specialized Health Check-up Packages

As healthcare becomes increasingly patient-centric, there is a growing trend towards offering personalized and specialized health check-up packages. Rather than a one-size-fits-all approach, healthcare providers are now designing tailored health screenings based on individual risk factors, family history, and lifestyle preferences. For example, packages focusing on cardiovascular health, cancer screening, mental health assessments, or screenings tailored to specific age groups or gender are becoming more popular.

This trend reflects a shift toward precision healthcare, where the aim is not just to diagnose but to tailor preventive care to the unique needs of everyone. Consumers are becoming more educated about their health risks and are seeking services that address their specific concerns. Healthcare providers are responding by developing specialized check-up packages that cater to these needs, offering more comprehensive and targeted assessments. This trend is expected to grow, as individuals look for more effective ways to manage their health and proactively address risks before they develop into serious conditions.

Segmental Insights

Type Insights

Based on the category of Type, the General Health Check-up segment emerged as the dominant in the Vietnam Health Check-up Market in 2024. General health check-ups

are the most widely adopted health screening service, appealing to a broad spectrum of the population across various demographic groups. Unlike specialized or advanced check-up packages, which may target specific health conditions or risk groups, general health check-ups provide a comprehensive assessment of an individual's overall health, making them accessible and relevant to most people. Whether for the purpose of routine health monitoring or as a precautionary measure, general health check-ups cater to individuals seeking a basic yet thorough examination of their health status. This wide accessibility is a critical factor driving the dominance of this segment in the Vietnam health check-up market. General health check-ups typically include a series of common tests, such as blood pressure monitoring, cholesterol and blood glucose screening, liver and kidney function tests, and basic health assessments. These are all widely understood, non-specialized tests that appeal to individuals who may not have specific health concerns but are seeking to ensure their overall well-being. Additionally, the simplicity and affordability of basic health check-ups compared to more specialized packages make them a popular choice among individuals across different income groups.

There is a noticeable shift in Vietnam toward a greater emphasis on preventive healthcare, driven by increasing health awareness, changing lifestyles, and the rising burden of chronic diseases. As the general population becomes more health-conscious, individuals are more inclined to seek routine health check-ups to monitor their well-being and catch potential health problems early. General health check-ups, which are designed to detect a broad range of health conditions before symptoms appear, are seen as a proactive approach to health management. The emphasis on early detection of common diseases like hypertension, diabetes, and cardiovascular issues aligns with the growing trend of prioritizing prevention over treatment in Vietnam's healthcare system. These check-ups are often seen as a first step in understanding one's health status, leading to early intervention and better health outcomes. As a result, general health check-ups are at the forefront of this preventive care movement and are expected to continue dominating the market.

Test Type Insights

The Blood Glucose Tests segment is projected to experience rapid growth during the forecast period. The primary factors contributing to the dominance of blood glucose tests in the Vietnam health check-up market is the rising prevalence of diabetes, particularly type 2 diabetes. According to various studies, diabetes has become a significant public health issue in Vietnam, with an increasing number of people being diagnosed with the condition each year. This rising prevalence is largely driven by lifestyle changes, such

as poor diet, lack of physical activity, and increasing urbanization, leading to a higher incidence of obesity and metabolic syndrome. Given that blood glucose tests are the most effective and reliable means of diagnosing diabetes and monitoring its progression, these tests have become a central part of general health check-ups. Early detection through blood glucose testing enables individuals to take timely action in managing or preventing the development of diabetes. As a result, the demand for this test has surged, positioning it as one of the dominant test categories within the health check-up market.

Blood glucose tests are relatively simple and inexpensive compared to more specialized diagnostic tests, which makes them highly accessible to a broader segment of the population. In Vietnam, where affordability remains a key consideration for many individuals when accessing healthcare, the relatively low cost of blood glucose testing plays a critical role in its widespread adoption. Healthcare providers, ranging from government hospitals to private clinics, offer blood glucose tests as part of routine health check-ups, and these services are often included in standard health screening packages. Additionally, the simplicity of the test means that it can be performed quickly and with minimal inconvenience to the patient, further enhancing its appeal. The low cost, coupled with the high diagnostic value, makes blood glucose tests a popular choice among individuals seeking regular health monitoring, thereby cementing their position in the health check-up market.

Regional Insights

Southern Region emerged as the dominant in the Vietnam Health Check-up Market in 2024, holding the largest market share in terms of value. The southern region, with Ho Chi Minh City as its economic and commercial hub, dominates the Vietnam health check-up market. Ho Chi Minh City is Vietnam's largest and most economically developed city, contributing significantly to the national GDP. The city's robust economy, characterized by a high concentration of both local and multinational companies, generates higher disposable income for its residents. This economic affluence translates into a greater ability and willingness to spend on health services, including preventive care like regular health check-ups.

As a result, healthcare providers in HCMC are well-positioned to offer a wide range of health check-up services, catering to both individuals and corporate clients seeking comprehensive wellness packages. The region's higher income levels allow a larger portion of the population to access premium health check-up services, further solidifying its dominance in the market. Ho Chi Minh City boasts a well-developed healthcare

infrastructure, with numerous private hospitals, specialty clinics, and diagnostic centers offering a wide range of health check-up services. The presence of internationally accredited healthcare providers, such as the FV Hospital and the Vinmec International Hospital, ensures that the region maintains high standards of medical care and attracts both domestic and international patients.

Key Market Players

Quest Diagnostics Incorporated

Labcorp Central Laboratory Services (ASIA) PTE. LTD

Opko Health Inc

Eurofins Scientific

Sonic Healthcare

IQVIA Vietnam

SGS Soci?t? G?n?rale de Surveillance SA.

ARUP

Dr Lal Path Labs Limited

Report Scope:

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

Vietnam Health Check-up Market, By Type:

General Health Check-up

Preventive Health Check-up

Specialized Health Check-up

Routine & Wellness Check-up

Vietnam Health Check-up Market, By Test Type:

Blood Glucose Tests

Kidney Function Tests

Bone Profile

Electrolytes

Liver Function Tests

Lipid Profile

Cardiac Biomarkers

Special Biochemistry

Hormones & Vitamins

Tumor Biomarkers

Others

Vietnam Health Check-up Market, By Application:

Cardiovascular Diseases

Metabolic Disorders

Cancer

Inflammatory Conditions

Musculoskeletal Disorders

Neurological Conditions

Other

Vietnam Health Check-up Market, By Service Providers:

Hospital-Based Laboratories

Central Laboratories

Stand-Alone Laboratories

Vietnam Health Check-up Market, By End User:

Enterprise

Individuals

Vietnam Health Check-up Market, By Region:

Northern Vietnam

Central Vietnam

Southern Vietnam

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Vietnam Health Check-up Market.

Available Customizations:

Vietnam Health Check-up 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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