

# **Vietnam Pharma Hub And Patient Access Support Service Market, By Service (Program Enrollment, Order Processing, Application Processing, Ease of Enrollment (Through Phone, Face, Portal, or App), Program Data, Treatment Navigators, Process Flows and Standard Operating Procedures, Program Literature and Scripts, Care Team Training, Systems Testing and Optimization, Reimbursement Services/Affordability Services, Clinical Educator, Coordination of Specialty Pharmacy/Dispensing, Others), By Delivery Type (Integrated Services, Standalone Services), By Region, Competition, Forecast & Opportunities, 2020-2030F**

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## **Abstracts**

Vietnam Pharma Hub And Patient Access Support Service Market was valued at USD 10.25 Million in 2024 and is anticipated to project robust growth in the forecast period with a CAGR of 11.45% through 2030. Vietnam's pharmaceutical market is undergoing rapid growth and is positioned for sustained expansion. This trajectory is propelled by strategic public-private partnerships, robust government initiatives, and a rising prevalence of chronic and infectious diseases. Despite these advancements, the sector faces critical barriers, including stringent regulatory processes, inadequate infrastructure, and limited public awareness of healthcare solutions.

In response, domestic and international investors are channeling significant resources

into the market, targeting innovation and capacity building. Companies such as Imexpharm have emerged as industry leaders, making substantial investments in research and development as well as advanced pharmaceutical manufacturing technologies to bolster their competitive edge. These targeted efforts are instrumental in driving Vietnam's ambition to establish itself as a pharmaceutical production hub in Southeast Asia.

While the industry presents lucrative growth prospects, its success hinges on overcoming persistent challenges and aligning with international standards to unlock its full potential and achieve long-term strategic goals.

## Key Market Drivers

### Increasing Disease Burden and Healthcare Needs

The rising disease burden in Vietnam, coupled with evolving healthcare needs, is a critical driver of the Pharma Hub and Patient Access Support Service market. This trend is reshaping the industry and creating unprecedented opportunities for growth. Non-communicable diseases such as cardiovascular diseases, diabetes, cancer, and chronic respiratory illnesses are on the rise due to lifestyle changes, urbanization, and an aging population. In Vietnam, non-communicable diseases (NCDs) now account for 80% of all deaths. While the country has made significant strides in improving maternal and child health and reducing infectious diseases such as malaria and tuberculosis, NCDs continue to pose a substantial public health challenge. A large proportion of the population remains undiagnosed, with approximately 70-80% of individuals with hypertension or diabetes not receiving appropriate treatment. This highlights a critical gap in healthcare delivery and underscores the need for enhanced detection and management of chronic conditions in the country. This rising prevalence necessitates the development and accessibility of specialized medications, innovative therapies, and long-term patient management programs, driving demand for patient access services and tailored support solutions. The burden of communicable diseases in Vietnam has notably decreased, from accounting for 38% and 33% of the morbidity and mortality burdens in 1996 to an anticipated 18% and 6%, respectively, by 2026. The projected 6% mortality burden from communicable diseases is considerably lower than the average rates seen across Southeast Asia. This remarkable reduction in disease burden is largely attributed to Vietnam's successful efforts in combating communicable diseases, which has directly contributed to the country's significant increase in life expectancy.

Vietnam continues to face challenges from infectious diseases such as tuberculosis (TB), dengue fever, and hepatitis B. The recent global pandemic has also underscored the need for robust pharmaceutical infrastructure to manage outbreaks effectively. Government initiatives like the National Tuberculosis Program and efforts to eliminate hepatitis B by 2030 are fueling demand for vaccines, antivirals, and patient support services. The pharmaceutical sector is responding by expanding manufacturing capabilities and launching patient education campaigns to ensure medication adherence and better health outcomes. Cancer rates in Vietnam have been escalating, with an estimated 182,563 new cases diagnosed annually. High treatment costs and limited access to advanced therapies have historically hindered effective treatment. Patient Access Support Services, including financial assistance programs, are bridging the gap by enabling affordability and adherence to costly cancer treatments such as targeted therapies and immunotherapies. Improved public awareness and government-led health initiatives are driving early diagnosis and treatment, particularly for chronic and infectious diseases. Nationwide campaigns for NCDs, such as hypertension and diabetes, have led to increased detection rates, creating demand for both pharmaceutical products and patient support services. Companies are leveraging these programs to expand their outreach, offering medication access programs and fostering adherence to prescribed treatments.

Vietnam's aging population is contributing to a higher incidence of age-related illnesses, while rising income levels are empowering patients to seek better healthcare solutions. With approximately 12% of the population aged 60 and above, demand for treatments for chronic illnesses, osteoporosis, and degenerative conditions is surging. Growing healthcare spending by the middle class is enabling wider adoption of advanced medications and support services, which were previously unaffordable to many. Programs that reduce out-of-pocket costs for high-cost treatments. Access to expert advice and treatment plans. Initiatives to ensure patients follow prescribed regimens, minimizing relapses and complications. The increasing disease burden and evolving healthcare needs in Vietnam are driving both demand and innovation in the pharmaceutical sector and patient access support services. These challenges, while significant, present opportunities for stakeholders to develop comprehensive, patient-centered solutions that enhance treatment accessibility and outcomes. By addressing these healthcare demands, Vietnam is not only transforming its domestic pharmaceutical landscape but also strengthening its position as a regional pharma hub.

### Growing Middle-Class Population and Healthcare Spending

Vietnam's growing middle-class population and the corresponding rise in healthcare

spending are pivotal forces driving the development of the Pharma Hub and Patient Access Support Service market. This socio-economic transformation is reshaping healthcare consumption patterns, creating significant opportunities for the pharmaceutical industry and support services. Vietnam aims to achieve upper-middle-income status by 2030 and transition to a high-income country by 2050. The country's middle class is projected to grow significantly, reaching 26% of the population by 2026, up from 13% (approximately 13 million people) in 2023. This expansion presents substantial growth opportunities for businesses, particularly in sectors poised to serve the evolving needs and purchasing power of an increasingly affluent consumer base. This demographic shift brings about increased purchasing power and a higher demand for quality healthcare services and products. As incomes rise, middle-class families allocate a larger portion of their budgets to healthcare, prioritizing preventive care, early diagnosis, and access to advanced treatments. This shift drives the consumption of branded medicines, innovative therapies, and health supplements, boosting the overall pharmaceutical market.

Vietnam's healthcare expenditure has been growing steadily, driven by government investments, insurance coverage expansion, and private spending. According to the Economist Intelligence Unit (EIU), Vietnam's healthcare expenditure reached approximately USD 18.5 billion in 2022, accounting for 4.6% of the country's GDP. Coupled with a declining birth rate, the country's aging population is driving an increased demand for healthcare services and products, creating significant market opportunities in the healthcare sector. Despite progress in public healthcare, out-of-pocket expenditures remain substantial, creating demand for patient support services that alleviate financial burdens. As the middle class grows, so does the demand for high-quality healthcare, including specialized treatments for chronic diseases and access to cutting-edge medications. Patients are increasingly seeking advanced treatments like biologics, targeted therapies, and immunotherapies for diseases such as cancer, diabetes, and cardiovascular conditions. This trend incentivizes pharmaceutical companies to introduce and localize production of high-cost therapies while enhancing access through support programs. The rising middle class is fueling the growth of private hospitals and clinics that offer premium healthcare services. These institutions collaborate with pharmaceutical companies to ensure the availability of high-cost drugs and implement patient access programs (PAPs) tailored to their clientele. Pharmaceutical firms are leveraging partnerships with private healthcare providers to increase their market penetration and support patient-centric solutions.

The middle class's emphasis on quality of life has amplified the importance of preventive care and wellness. Higher disposable incomes have led to increased

participation in regular health check-ups, early screenings for chronic diseases, and the uptake of vaccinations. This trend drives demand for pharmaceutical products, vaccines, and support services that promote adherence to preventive measures and treatments. The expansion of health insurance coverage, driven by both government schemes and private insurance providers, has enabled middle-class consumers to access previously unaffordable treatments. Increased insurance adoption reduces the financial barriers to high-cost treatments, creating opportunities for pharmaceutical companies to expand their patient access programs. Medication Access Programs (MAPs) and financial assistance initiatives complement insurance coverage, ensuring comprehensive access to essential medications. The middle class's tech-savvy nature has accelerated the adoption of digital healthcare solutions, such as telemedicine, online pharmacies, and app-based patient support services. These platforms cater to the middle-class demand for convenience, enabling easy access to medications and support services. Pharmaceutical companies are integrating digital tools into their patient access programs to improve education, adherence, and health outcomes.

### Rising Investments in R&D and Manufacturing Needs

Increasing investments in research and development (R&D) and pharmaceutical manufacturing capabilities are pivotal to the growth of Vietnam's Pharma Hub and Patient Access Support Service market. These investments address critical market needs, bolster domestic production, and position Vietnam as a competitive player in the global pharmaceutical landscape. The National Strategy for the Development of the Domestic Pharmaceutical Industry through 2030, with a vision towards 2045, aims for the domestic pharmaceutical sector to meet 80% of local demand in terms of production capacity. Additionally, it is projected that domestic products will account for 70% of the total pharmaceutical market value, reinforcing the country's ambition to strengthen its self-reliance and competitiveness within the industry. Tax breaks, subsidies, and streamlined regulatory processes are attracting local and foreign investors to establish manufacturing facilities and R&D centers.

Vietnam is transitioning from basic drug production to high-value pharmaceutical manufacturing, including biologics, biosimilars, and advanced formulations. Investments in state-of-the-art facilities meeting international standards have boosted production quality, enabling Vietnamese manufacturers to compete globally and expand exports. Companies are focusing on producing niche drugs, such as oncology treatments and vaccines, to cater to both domestic and international markets. Significant investments are being directed toward R&D to innovate and localize the production of advanced medicines. Companies are investing in R&D for cutting-edge therapies to meet the



growing demand for personalized medicine, especially for chronic diseases like cancer and diabetes. Partnerships between local firms, global pharmaceutical companies, and academic institutions are fostering innovation and technology transfer. Investments in R&D and manufacturing directly enhance patient access support services by reducing costs and improving availability. Local production of high-cost medications, such as biosimilars and generics, lowers prices, making treatments more affordable for patients. Enhanced manufacturing capacity ensures a steady supply of essential drugs, reducing stockouts and improving accessibility, especially in underserved areas.

Vietnam's favorable investment climate and strategic location in Southeast Asia are attracting multinational pharmaceutical companies to establish operations. Companies like Sanofi, Pfizer, and Takeda have made significant investments in local production and R&D. Foreign investment brings advanced technologies and expertise, accelerating the development of Vietnam's pharmaceutical infrastructure. With improved manufacturing capabilities, Vietnam is emerging as an exporter of high-quality pharmaceuticals. Strengthened R&D and manufacturing allow Vietnamese companies to meet international quality standards, opening export opportunities to ASEAN, Europe, and beyond. Export success reinforces Vietnam's reputation as a regional pharmaceutical hub, attracting further investment and partnerships. The COVID-19 pandemic highlighted the importance of domestic vaccine production, leading to increased investments in this area. Companies and government entities are investing in facilities to produce vaccines for infectious diseases like COVID-19, dengue fever, and influenza. These efforts aim to reduce reliance on imports and improve national healthcare security. The integration of advanced technologies in pharmaceutical manufacturing is improving efficiency and scalability. Automation, AI, and IoT are being incorporated into production processes to enhance productivity and ensure quality. Investments in technology also streamline supply chains, ensuring timely delivery of drugs and patient support services.

## Key Market Challenges

### Regulatory Barriers and Compliance Issues

Regulatory challenges represent one of the most significant barriers to growth within Vietnam's pharmaceutical market. The complexity and length of regulatory processes can impede the timely introduction of new drugs and therapies, impacting market dynamics.

Pharmaceutical companies, both local and international, often face slow approval times

due to lengthy registration processes, inconsistent enforcement of regulations, and bureaucratic inefficiencies. This can result in delayed product launches and extended time-to-market. While Vietnam has made strides in aligning its regulations with international standards, discrepancies still exist. Companies often encounter challenges in obtaining EU-GMP or WHO-GMP certifications, which are crucial for both domestic and international market access. These regulatory bottlenecks hinder the entry of innovative medicines, prolong the availability of generic drugs, and slow down the overall pace of market expansion. This issue also discourages foreign investment, as companies may be wary of navigating an unpredictable regulatory landscape.

### Infrastructure Limitations in Manufacturing and Distribution

The growth of the Vietnam Pharma Hub is constrained by infrastructure challenges in both the manufacturing and distribution segments. Although significant investments have been made, there remain gaps that hinder efficiency, quality assurance, and supply chain management.

A large portion of Vietnam's pharmaceutical manufacturing facilities are still below international standards, with only a small fraction meeting EU-GMP or equivalent certifications. The lack of high-quality manufacturing infrastructure limits the production of high-value pharmaceuticals such as biologics, biosimilars, and specialized generics. The distribution network for pharmaceuticals, especially in rural or remote areas, remains underdeveloped. This results in uneven drug availability, which can create stockouts and delays in treatment for patients in need. Logistics infrastructure, including cold chain systems for temperature-sensitive medicines, is still limited in certain areas. These infrastructure limitations not only affect the quality and consistency of pharmaceutical products but also impede the ability to scale production and reach broader patient populations. Companies seeking to position Vietnam as a regional pharmaceutical hub must invest heavily in modernizing manufacturing plants and improving distribution channels, which presents both financial and logistical challenges.

### Key Market Trends

#### Digitalization and the Integration of Technology in Healthcare Delivery

The digital transformation of Vietnam's healthcare system is rapidly accelerating, significantly impacting the pharmaceutical and patient access markets. The integration of digital tools into both pharmaceutical production and patient support services is revolutionizing how healthcare is delivered and consumed.

The widespread adoption of telemedicine, especially in the wake of the COVID-19 pandemic, is reshaping healthcare delivery. Digital platforms allow patients to consult with doctors remotely, receive prescriptions electronically, and access pharmaceutical products through online pharmacies. This shift facilitates greater patient engagement and expands access to treatments, especially in underserved regions. Pharmaceutical companies are increasingly leveraging artificial intelligence (AI) and big data to accelerate drug discovery, personalize treatment regimens, and improve patient outcomes. AI-driven insights allow for faster identification of drug efficacy, while big data analytics enable companies to anticipate healthcare needs and improve the efficiency of patient access programs. Digital tools for remote monitoring of chronic diseases and medication adherence are becoming more prevalent. These tools help patients stay on track with their treatment plans, enhancing medication adherence and improving health outcomes, particularly for chronic conditions such as diabetes and cardiovascular diseases.

### Focus on Personalized Medicine and Tailored Patient Support

The growing emphasis on personalized medicine is driving the development of treatments that are specifically tailored to an individual's genetic profile, lifestyle, and health conditions. This trend is transforming the pharmaceutical market in Vietnam, creating demand for more specialized drugs and patient-centric support services.

The use of genetic testing to determine the most effective treatments for patients is gaining momentum. As the demand for precision medicine grows, pharmaceutical companies are focusing on developing biologics and targeted therapies that offer highly personalized treatment options. This trend is shifting the market from one-size-fits-all solutions to tailored drug regimens, which can be more effective and have fewer side effects. As treatments become more personalized, so too must the patient support services. This involves creating bespoke access programs that consider a patient's unique needs, including financial assistance, adherence support, and educational resources. Personalized patient support is becoming increasingly important as patients demand more tailored solutions to help manage complex conditions. With the increased use of genomic data, pharmaceutical companies can design more effective treatment protocols, enhancing patient outcomes and reducing healthcare costs by focusing on the most effective treatment for individual patients.

### Segmental Insights



## Service Insights

Based on the category of Service, the Program Enrollment segment emerged as the dominant in the Vietnam Pharma Hub And Patient Access Support Service market in 2024. Program Enrollment services are crucial in facilitating access to these costly treatments by connecting eligible patients to financial assistance programs (FAPs), which reduce or eliminate out-of-pocket costs. This enables patients to enroll in drug access programs that offer subsidized or free medications, significantly improving treatment adherence and health outcomes. Pharmaceutical companies often establish these programs in partnership with local health authorities or nonprofit organizations to ensure that their innovative products are accessible to patients in need. Through Program Enrollment, companies can widen the reach of their products, while ensuring that patients do not forego treatment due to financial constraints.

The Program Enrollment segment addresses a key operational challenge in healthcare: ensuring that patients can enroll in patient assistance programs and access medications in a timely and efficient manner. In a market like Vietnam, where healthcare infrastructure may not be uniform across urban and rural areas, streamlined enrollment processes become crucial in ensuring accessibility and equity. By simplifying and digitalizing the enrollment process, pharmaceutical companies and healthcare providers make it easier for patients to sign up for various programs. This often involves collecting patient information, confirming eligibility for support programs, and registering them into databases that allow for seamless distribution of medications. The automation of this process reduces administrative burdens and ensures quicker access to treatment. The use of digital platforms for program enrollment, such as mobile apps and online portals, enhances the ease of registration. These platforms provide patients with real-time information about available assistance programs, eligibility criteria, and the steps involved in the enrollment process, making it more accessible for individuals with limited digital literacy or access to healthcare services. These factors are expected to drive the growth of this segment.

## Regional Insights

Southern Vietnam emerged as the dominant in the Vietnam's Pharma Hub and Patient Access Support Service Market in 2024, holding the largest market share in terms of value. The Southern region, with Ho Chi Minh City as the economic and pharmaceutical hub, plays a dominant role in Vietnam's pharmaceutical sector. The region benefits from robust healthcare infrastructure, better access to international markets, and stronger collaboration between the government, pharmaceutical companies, and

healthcare providers.

Ho Chi Minh City is the economic powerhouse of Vietnam, with the highest concentration of pharmaceutical companies, multinational drug manufacturers, research institutions, and healthcare providers. The city attracts both local and foreign investments due to its strong industrial base and connectivity to global trade networks. The region also houses many regional headquarters and production facilities for global pharmaceutical companies, which enhances the presence of multinational players in the local market and supports the overall growth of the Pharma Hub. The Southern region has the most advanced healthcare infrastructure in Vietnam, including hospitals, research centers, and diagnostic laboratories. Many top-tier medical institutions are located in Ho Chi Minh City, providing the foundation for sophisticated patient care services, including patient access programs for high-cost medications and advanced therapies. The well-established distribution channels for pharmaceutical products in the South ensure efficient and widespread availability of medicines, which is essential for patient access services. The region's robust logistical capabilities enable companies to scale their operations and provide timely deliveries across the country.

### Key Market Players

MCKESSON CORPORATION

Inizio

Cardinal Health

Envoy Health, Inc.

EVERSANA

### Report Scope:

In this report, the Vietnam Pharma Hub And Patient Access Support Service Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Vietnam Pharma Hub And Patient Access Support Service Market, By Service:

Program Enrollment

Order Processing

Application Processing

Ease of Enrollment (Through Phone, Face, Portal, or App)

Program Data

Treatment Navigators

Process Flows and Standard Operating Procedures

Program Literature and Scripts

Care Team Training

Systems Testing and Optimization

Reimbursement Services/Affordability Services

Clinical Educator

Coordination of Specialty Pharmacy/Dispensing

Others

Vietnam Pharma Hub And Patient Access Support Service Market, By Delivery Type:

Integrated Services

Standalone Services

Vietnam Pharma Hub And Patient Access Support Service Market, By Region:

Northern Vietnam

Central Vietnam

Southern Vietnam

### Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Vietnam Pharma Hub And Patient Access Support Service Market.

### Available Customizations:

Vietnam Pharma Hub And Patient Access Support Service 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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