

Vietnam In-Vitro Diagnostics Market By Product & Service (Reagents, Instruments, Software & Services), By Technique (Immunodiagnosics, Hematology, Molecular Diagnostics, Tissue Diagnostics, Clinical Chemistry, Others), By Application (Infectious Diseases, Cancer, Cardiac Diseases, Immune System Disorders, Nephrological Diseases, Others), By End User (Hospitals & Clinics, Diagnostic Laboratories, Others), By Region, Competition, Forecast and Opportunities, 2020-2030F

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Report description:

Vietnam In-Vitro Diagnostics Market was valued at USD 336.07 Million in 2024 and is expected to reach USD 441.23 Million by 2030 with a CAGR of 4.60% during the forecast period. The In-vitro Diagnostics (IVD) market in Vietnam is witnessing significant growth, fueled by various factors reflecting the country's healthcare advancements and the evolving needs of its population. This market includes a broad spectrum of diagnostic tests conducted on biological samples such as blood, urine, and tissues, aimed at detecting diseases, conditions, and infections.

The rising incidence of chronic diseases like diabetes, cardiovascular diseases, and cancer in Vietnam has heightened the demand for early and accurate diagnostic solutions. The Vietnam IVD market is set for robust expansion, supported by favorable demographic trends, government initiatives, and technological innovations. However, addressing regulatory, economic, and educational challenges will be essential for sustaining this growth and ensuring widespread access to advanced diagnostic solutions. Companies in this market must navigate these complexities while continuing to innovate and adapt to the evolving healthcare landscape in Vietnam.

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Key Market Drivers

Epidemiological Shifts and Rising Chronic Disease Burden

Vietnam is witnessing a substantial increase in chronic diseases, which significantly drives the demand for In-vitro Diagnostics (IVD). Chronic diseases such as diabetes, cardiovascular diseases, and cancer have become more prevalent due to factors like aging population, urbanization, and lifestyle changes. The incidence of diabetes in Vietnam is growing at a concerning rate. This chronic condition requires continuous monitoring of blood glucose levels, which relies heavily on IVD tools. Frequent diagnostic testing helps in managing the disease, adjusting treatments, and preventing complications. As one of the leading causes of death in Vietnam, cardiovascular diseases necessitate extensive diagnostic testing for early detection, risk assessment, and monitoring of treatment efficacy. The increasing number of patients with hypertension and heart diseases translates into higher utilization of IVD tests such as lipid profiles, cardiac biomarkers, and coagulation tests. The rise in cancer cases highlights the need for early and precise diagnosis, which is crucial for effective treatment. Vietnam ranks among the top 10 countries globally in terms of tuberculosis (TB) burden. According to data from USAID, over 170,000 individuals are diagnosed with TB annually, but less than 60% receive adequate treatment. Furthermore, government statistics report a significant surge in confirmed TB cases, with a >400% increase in 2022 compared to 2021, resulting in over 360,000 reported cases and approximately 140 deaths. This growing epidemic, combined with the rise in chronic diseases, highlights the increasing demand for in-vitro diagnostics in Vietnam, as the healthcare system faces pressure to enhance diagnostic capabilities and treatment outcomes. Advanced IVD techniques, including molecular diagnostics and tissue biopsies, are essential for detecting various types of cancers, understanding their progression, and tailoring personalized treatment plans.

Vietnam's demographic trends reveal a rapidly aging population, which naturally leads to an increase in age-related chronic conditions. Older individuals are more prone to diseases such as diabetes, hypertension, and cancer, all of which require ongoing diagnostic monitoring and management. According to a 2019 UNFPA report, nearly 11.9% of the population was aged 60 and above, a proportion expected to exceed 25% by 2050. To address the health needs of this growing demographic and achieve the country's 2030 health objectives, the government has implemented several initiatives, including the National Strategy to End the AIDS Epidemic by 2030, approved in August 2020. The elderly typically undergo more frequent health screenings and diagnostic tests to manage existing conditions and detect new health issues early, driving the demand for in-vitro diagnostics (IVD) services. Additionally, rapid urbanization and changing lifestyle habits are significantly contributing to shifts in Vietnam's epidemiological landscape. The transition from rural to urban living often leads to reduced physical activity, poor dietary habits, and higher stress, which are all major risk factors for chronic diseases. As urban lifestyles contribute to rising rates of obesity and associated disorders like diabetes and cardiovascular diseases, the need for a broad spectrum of diagnostic tests is increasing, further fueling the growth of the IVD market. Urbanization also introduces new occupational health risks, requiring regular monitoring through diagnostic testing, thereby enhancing market demand.

The Vietnamese government and various health organizations have launched initiatives aimed at increasing public awareness about chronic diseases and the importance of early detection and management. These initiatives often include free or subsidized screening programs that utilize IVD tests extensively. Nationwide screening programs for diseases like diabetes and cancer are increasing the use of diagnostic tests, thereby driving market growth. For example, mass screenings for hepatitis B and C, prevalent in Vietnam, are critical for early intervention and treatment, leading to higher demand for relevant IVD tests. Public health campaigns aimed at educating the population about the risks of chronic diseases and the benefits of early detection have led to an increase in health-seeking behavior, with more individuals opting for regular check-ups and diagnostic testing. Advancements in diagnostic technology have made it possible to perform more accurate, faster, and less invasive tests. These innovations are particularly beneficial for managing chronic diseases, where continuous monitoring is often required. The development of portable diagnostic devices and point-of-care testing solutions allows for immediate results, making it easier to manage chronic conditions effectively, especially in remote and underserved areas. Cutting-edge molecular diagnostics provide detailed insights into genetic predispositions and disease mechanisms, facilitating personalized medicine approaches that are becoming increasingly important in chronic disease management.

Government Initiatives and Healthcare Infrastructure Development

In recent years, the Vietnamese government has substantially increased its healthcare spending, recognizing the vital need to enhance public health outcomes. As reported by 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. This increase in funding has driven several key developments that positively impact the in-vitro diagnostics (IVD) market. The additional resources have facilitated the modernization and expansion of healthcare facilities across the country, enabling hospitals and clinics to better integrate advanced IVD technologies and improve diagnostic capabilities. This financial boost is also enabling healthcare institutions to acquire cutting-edge diagnostic equipment, enhancing diagnostic accuracy and expanding the range of available tests. The Vietnamese government has introduced several national health programs aimed at early disease detection and prevention, which have significantly increased demand for IVD testing.

The government has made strides in reforming regulatory frameworks, streamlining approval processes for medical devices, including IVD products, to reduce the time and cost involved in bringing new innovations to market. These reforms, aligned with international standards, facilitate the entry of high-quality diagnostic products into the Vietnamese market, ensuring improved diagnostic outcomes. Vietnam has also committed to upgrading its healthcare infrastructure in response to increasing numbers of citizens seeking medical treatment abroad. Starting in March 2024, six hospitals in Hanoi, Ho Chi Minh City, and Thua Thien-Hue will be modernized to international standards, equipped with advanced technologies, and offer world-class medical services. By 2025, the country aims to meet ambitious targets such as 33 hospital beds, 15 doctors, 3.4 pharmacists, and 25 nurses per 10,000 people for healthcare accessibility. By 2050, Vietnam plans to further enhance its healthcare sector, establishing modern, internationally accredited facilities and expanding private healthcare options. The government has also provided incentives to private investors, such as tax breaks and subsidies, to encourage the development of advanced diagnostic centers. These collaborations are helping establish facilities equipped with the latest IVD technologies. Furthermore, the government is working to expand healthcare access in rural areas, where healthcare has historically been limited. Initiatives to build rural health clinics and mobile health units are increasing the demand for portable, user-friendly IVD devices. Additionally, government support for telemedicine and remote diagnostics is expanding access to healthcare, with IVD technologies playing a crucial role by enabling remote diagnostic analysis by specialists.

Technological Advancements and Innovation

Technological advancements in IVD have significantly improved the accuracy and efficiency of diagnostic tests, which is a critical driver for market growth in Vietnam. Innovations in molecular diagnostics, such as PCR (Polymerase Chain Reaction) and next-generation sequencing, allow for highly precise detection of genetic mutations, pathogens, and biomarkers. These technologies provide definitive diagnoses, enabling better patient management and personalized treatment plans. Advances in immunoassay techniques, including chemiluminescent and fluorescent immunoassays, have increased the sensitivity and specificity of tests for various diseases. These improvements are crucial for early disease detection and monitoring, particularly in chronic and infectious diseases.

The emergence and development of point-of-care testing (POCT) devices have revolutionized the IVD market by enabling immediate diagnostic results at the site of patient care. POCT devices offer rapid turnaround times, which is particularly beneficial in emergency and critical care settings. Immediate results can lead to faster clinical decision-making and improved patient outcomes. Portable and easy-to-use POCT devices enhance diagnostic accessibility, especially in rural and remote areas where laboratory infrastructure may be lacking. This accessibility is vital for expanding healthcare services to underserved populations. Automation and the integration of AI in IVD are transforming laboratory operations and diagnostic capabilities. Automated diagnostic systems streamline laboratory workflows, reduce manual errors, and increase throughput. These systems can handle high volumes of tests efficiently, meeting the growing demand for diagnostic services in Vietnam. AI and machine learning algorithms are being integrated into diagnostic platforms to analyze complex data sets and provide accurate interpretations. AI-driven diagnostics can identify patterns and anomalies that may be missed by human analysis, enhancing the reliability of test results.

Technological advancements in sample collection and processing are improving the efficiency and comfort of diagnostic testing. The development of non-invasive and minimally invasive sample collection methods, such as saliva-based tests and micro-sampling, reduces patient discomfort and encourages more frequent testing. This is particularly important for chronic disease management and population screening programs. Innovations in sample preservation and transport technologies ensure the integrity of biological samples from collection to analysis, which is crucial for accurate diagnostic outcomes. The integration of digital health technologies with IVD is enhancing the overall diagnostic process and patient management. Digital platforms enable

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telemedicine and remote monitoring, where patients can use home-based diagnostic kits and share results with healthcare providers via digital channels. This approach increases convenience for patients and allows continuous monitoring of chronic conditions. The integration of IVD results with EHRs facilitates comprehensive patient data management, enabling healthcare providers to make informed decisions based on a complete medical history.

Key Market Challenges

Regulatory Hurdles and Compliance Issues

The regulatory landscape for medical devices, including IVD products, in Vietnam can be complex and stringent, posing significant challenges for market entry and expansion. The approval process for new diagnostic products is often lengthy and involves multiple bureaucratic layers. This can delay the introduction of innovative diagnostic technologies into the market, limiting the availability of advanced diagnostic tools. Ensuring compliance with local regulatory standards, which may differ from international norms, can be challenging for multinational companies. This often requires additional adjustments to products and documentation, increasing time and costs. The regulatory environment in Vietnam is evolving, with frequent updates and changes. Keeping up with these changes requires continuous monitoring and adaptability, which can be resource-intensive for companies.

Economic Disparities and Limited Healthcare Access

Economic disparities and limited healthcare access, particularly in rural and underserved areas, present significant barriers to the widespread adoption of IVD technologies. Significant income disparities exist between urban and rural populations. High costs of advanced diagnostic tests may not be affordable for a large segment of the population, restricting the market reach of IVD products. Rural areas often lack the necessary healthcare infrastructure, including diagnostic laboratories and trained personnel, to effectively utilize advanced IVD technologies. This limits the penetration of IVD services outside major urban centers. Although healthcare insurance is expanding, coverage for diagnostic tests remains limited. Out-of-pocket expenses for diagnostic services can be prohibitively high for many patients, reducing the demand for these services.

Shortage of Skilled Healthcare Professionals

The effective utilization of advanced IVD technologies requires a skilled workforce, which is currently in short supply in Vietnam. There is a shortage of healthcare professionals trained in the latest diagnostic technologies. This gap affects the quality and reliability of diagnostic services, as well as the ability to fully leverage advanced IVD tools. Rapid technological advancements in the IVD sector necessitate continuous education and training for healthcare providers. The current educational infrastructure is often inadequate to keep pace with these needs, resulting in a skills gap. Retaining skilled professionals is challenging due to better opportunities and compensation packages in other countries. This brain drain further exacerbates the shortage of qualified personnel in Vietnam's healthcare sector.

Key Market Trends

Adoption of Personalized Medicine and Precision Diagnostics

The shift towards personalized medicine is a critical trend that will significantly drive the growth of the IVD market in Vietnam. Advances in genomic testing and molecular diagnostics are enabling more precise identification of genetic mutations and biomarkers associated with various diseases. This trend supports the development of targeted therapies, enhancing treatment efficacy and patient outcomes. As the Vietnamese healthcare system adopts these technologies, the demand for sophisticated IVD tests will increase. Personalized medicine involves tailoring treatment plans to individual patients based on their genetic profile and specific disease characteristics. This approach relies heavily on accurate and comprehensive diagnostic information provided by advanced IVD tests. As healthcare providers in Vietnam increasingly move towards personalized treatment strategies, the utilization of IVD technologies will expand. Personalized medicine is particularly beneficial for managing chronic diseases such as cancer, diabetes, and cardiovascular diseases. By using IVD tests to monitor disease progression and treatment response, healthcare providers can make more informed decisions, leading to better patient management and outcomes. This will drive continuous demand for IVD solutions.

Integration of Digital Health and Telemedicine

The integration of digital health technologies and telemedicine is transforming the delivery of healthcare services in Vietnam, creating new opportunities for the IVD market. The rise of telemedicine and remote healthcare services, especially accelerated by the COVID-19 pandemic, has increased the need for remote diagnostic capabilities. Home-based diagnostic kits and portable IVD

devices that patients can use at home and share results with their healthcare providers remotely are becoming more popular. This trend is likely to continue, boosting the demand for user-friendly and reliable IVD products. Digital health platforms are increasingly incorporating data analytics and artificial intelligence (AI) to enhance diagnostic accuracy and efficiency. AI algorithms can analyze large datasets from IVD tests to identify patterns and provide actionable insights. This not only improves diagnostic outcomes but also streamlines workflows in clinical settings. The integration of AI and data analytics in IVD will drive market growth by improving the value proposition of diagnostic solutions. Over 92% of public hospitals in Vietnam have partnered with local IT companies, such as FPT, Link Toan Cau, Dang Quang, and OneNET, to develop and implement digital health solutions. In contrast to public hospitals, private healthcare facilities in Vietnam have more advanced health management systems. Prominent hospital chains, such as Hoan My and Vinmec, have upgraded their digital infrastructure to better manage their expanding networks of branches. Additionally, many foreign-invested hospitals are increasingly prioritizing investments in digital platforms to enhance service delivery and optimize operational efficiency. This growing integration of digital health solutions is driving innovation within the healthcare sector, creating new opportunities for digital health technologies and further expanding the market for diagnostic and healthcare services. The push for interoperable healthcare systems and connected devices is facilitating better data sharing and integration across various healthcare platforms. This connectivity ensures that diagnostic information from IVD tests is readily accessible and usable by healthcare providers, enhancing the overall efficiency and effectiveness of patient care. The trend towards greater interoperability will support the widespread adoption of IVD technologies.

Expansion of Point-of-Care Testing (POCT) and Decentralized Diagnostics

The expansion of point-of-care testing (POCT) and decentralized diagnostic solutions is a significant trend driving the growth of the IVD market in Vietnam. POCT devices provide rapid and accurate diagnostic results at the site of patient care, such as clinics, community health centers, and even at home. This accessibility is particularly important in Vietnam, where rural and underserved areas may lack advanced laboratory facilities. The convenience and immediacy of POCT are driving their adoption across various healthcare settings. POCT devices are crucial for the ongoing monitoring of chronic diseases, allowing for regular and immediate assessment of conditions such as diabetes and cardiovascular diseases. This continuous monitoring helps in timely intervention and better disease management, thus increasing the reliance on POCT solutions. Advances in POCT technologies, including miniaturization, enhanced sensitivity, and integration with mobile health platforms, are making these devices more effective and user-friendly. Innovations such as multiplexing capabilities, which allow multiple tests to be conducted simultaneously on a single device, are expanding the range of applications for POCT. This technological progress will continue to drive the growth of the IVD market by making diagnostic testing more versatile and accessible.

Segmental Insights

Technique Insights

Based on Technique, the Immunodiagnostics emerged as the fastest growing segment in the Vietnam In-Vitro Diagnostics market during the forecast period. Immunodiagnostic tests, such as enzyme-linked immunosorbent assays (ELISAs) and rapid immunochromatographic assays, are extensively used for screening and diagnosing conditions like hepatitis B and C, as well as HIV. The high prevalence of these diseases ensures sustained demand for immunodiagnostic testing. Additionally, the rise of emerging infectious diseases, including zoonotic infections and tropical diseases, further drives the need for these tests, which are critical for early detection and effective outbreak management, thus supporting public health efforts.

According to the World Health Organization (WHO), Vietnam ranks 5th in life expectancy for men and 2nd for women among 10 Southeast Asian countries. On average, the Vietnamese population has a life expectancy of 73.7 years, although they live with chronic illness for approximately 10 years. This increasing incidence of chronic conditions such as diabetes, cardiovascular diseases, and cancer in Vietnam is another key factor fueling the growth of the immunodiagnostics segment. Immunodiagnostic tests are vital for detecting cardiac biomarkers, such as troponins and BNP, which aid in diagnosing and managing heart diseases. The rising prevalence of cardiovascular conditions further amplifies the demand for these tests. In oncology, immunodiagnostic tests are essential for detecting specific tumor markers (e.g., PSA for prostate cancer, CA-125 for ovarian cancer), enabling early detection and monitoring of cancer, which is critical for improving patient outcomes. Continuous advancements in immunodiagnostic technologies are enhancing test sensitivity, specificity, and overall diagnostic accuracy, making them more reliable and appealing for broader use. Innovations such as chemiluminescent immunoassays (CLIAs) and time-resolved fluorescence immunoassays (TRFIAs) offer improved sensitivity and specificity, essential for accurate diagnosis and monitoring.

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The development of multiplex immunoassays, which allow the simultaneous detection of multiple analytes from a single sample, enhances efficiency and reduces costs, making them particularly valuable for large-scale screening programs.

Application Insights

Based on application, Infectious Diseases emerged as the dominating segment in the Vietnam In-Vitro Diagnostics market in 2024. Vietnam continues to face a significant public health challenge due to the widespread presence of infectious diseases such as hepatitis B and C, HIV, and tuberculosis. These conditions create a persistent demand for diagnostic testing. Hepatitis B and C are especially concerning, while HIV remains a key focus for screening and early intervention initiatives. Additionally, the emergence of new infectious threats, including zoonotic and tropical diseases, has increased the need for fast and accurate diagnostic solutions. Outbreaks of diseases like dengue and influenza require constant monitoring, early identification, and rapid response, all of which rely on effective diagnostic tools. In response, the Vietnamese government has rolled out various public health programs aimed at controlling and preventing the spread of these infectious diseases. National screening campaigns and efforts to curb transmission, particularly for HIV and hepatitis, have driven up the use of IVD tests. Early detection is essential for controlling and halting the spread of these diseases, and immunodiagnostic tests, such as enzyme-linked immunosorbent assays (ELISAs) and rapid immunochromatographic assays, are crucial for this purpose. As these tests gain wider usage through government health initiatives, they play a major role in boosting demand for IVD products across the country. The ongoing prevalence of infectious diseases, supported by proactive public health programs and the increasing need for reliable, rapid diagnostics, positions this segment as the primary driver of the IVD market in Vietnam.

Regional Insights

Based on Region, Southern Vietnam emerged as the dominating region in the Vietnam In-Vitro Diagnostics market in 2024. South Vietnam, particularly major cities like Ho Chi Minh City (formerly Saigon), functions as the country's economic and financial nucleus. This region possesses sophisticated healthcare infrastructure, comprising contemporary hospitals, clinics, and diagnostic laboratories equipped with state-of-the-art IVD technologies. The concentration of healthcare facilities in South Vietnam facilitates widespread access to diagnostic services for a substantial portion of the population. South Vietnam exhibits a higher population density compared to other regions, characterized by both urban and suburban areas. This dense demographic creates a sizable market for healthcare services, including diagnostic testing. Additionally, South Vietnam attracts skilled healthcare professionals, encompassing doctors, laboratory technicians, and researchers, who actively contribute to the advancement and application of advanced IVD technologies within the region. The southern region of Vietnam, particularly urban centers like Ho Chi Minh City, stands at the forefront of technological advancements and innovation within the healthcare sector. The presence of eminent research institutions, medical universities, and biotechnology companies cultivates an environment conducive to innovation, driving the development of pioneering diagnostic solutions. South Vietnam thus serves as a focal point for research and development endeavors related to IVD technologies, facilitating the introduction of cutting-edge diagnostic products into the market.

Key Market Players

- F. Hoffmann-La Roche Ltd
- Abbott Laboratories GmbH
- Siemens Vietnam
- Thermo Fisher Scientific Inc
- Natera, Inc.
- Agilent Technologies, Inc
- BD Vietnam Co. Ltd.

Report Scope:

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

□□Vietnam In-vitro Diagnostics Market, By Product & Service:

- o Reagents
- o Instruments
- o Software & Services

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□□Vietnam In-vitro Diagnostics Market, By Technique:

- o Immunodiagnosics
- o Hematology
- o Molecular Diagnostics
- o Tissue Diagnostics
- o Clinical Chemistry
- o Others

□□Vietnam In-vitro Diagnostics Market, By Application:

- o Infectious Diseases
- o Cancer
- o Cardiac Diseases
- o Immune System Disorders
- o Nephrological Diseases
- o Others

□□Vietnam In-vitro Diagnostics Market, By End User:

- o Hospitals & Clinics
- o Diagnostic Laboratories
- o Others

□□Vietnam In-vitro Diagnostics Market, By Region:

- o Southern Vietnam
- o Northern Vietnam
- o Central Vietnam

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Vietnam In-vitro Diagnostics Market.

Available Customizations:

Vietnam In-vitro Diagnostics 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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