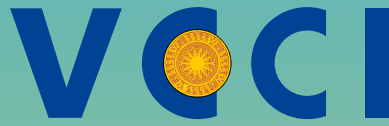




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COMMERCE AND INDUSTRY



United Nations Population
Fund

REPORT

MARKET OUTLOOK FOR ELDERLY CARE SERVICE IN VIETNAM



- HCMC, October, 2021 -

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MARKET OUTLOOK FOR ELDERLY CARE SERVICE IN VIETNAM

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REPORT

MARKET OUTLOOK FOR ELDERLY CARE SERVICE IN VIETNAM

1. BACKGROUND INFORMATION AND REPORT OBJECTIVE

Rapid population ageing have become an increasing concern and challenge for Vietnam. In 2009, Population Census reported 6.1 million of people above 60 years old, accounting for 8.1% (i.e. 1 out of every 12 citizens was at old age). By 2019, the figure reached 11.41 million, i.e. 11.86% of the population, a rise by 5 million old people. The trend is forecasted to accelerate and by 2035-2038, about 1/5 of Vietnam population will be elderly (TCTK, 2016). The absolute figure is projected to be about 21 million people, with 1 out of every 5 habitants will be old. By 2039, the quantile of elder will be larger than children portion. The decline of population quantile in working age will challenge economic development.

In some specific segments, the statistics flags different trends and considerations: 7.7 million old people are living in rural area (67.16%)¹ though seemed to steadily decline; the portion of elderly living in general poor households was about 25% (2016) and in multi-dimension poor household was 23.2% (2017). With the share of the elderly living in poor households doubling the national average in 2020, this raises the question whether the elderly care has increased burden for household living expensses, deepening their difficulties. In a broader context, this falls in line with recent policy recommendations that comprehensive care for the elderly is one key contributor for sustainable development².

On 20 Jan 2021, Ministry of Health issued the Decision 403/QĐ-BYT for the Action Plan for Elderly Health Care by 2030 of MOH. The Decision and the Plan state that “The 21st century is the century of population aging³. Around the world between 2000 and 2050, the proportion of the population over 60 years old will double from 11% to 22%. The number of people aged 60 and over (age 60+) is forecast to increase to 1,400 million by 2030 and 2,100 million by 2050⁴. In ASEAN countries, there will be nearly 60 million elderly people, accounting for 9.3% of the total population and by 2050, the projection is 24%⁵ of the total population and ASEAN will become an aging society.


¹ [The Population And Housing Census 2019: Population Ageing and Older Persons in Viet Nam, https://vietnam.unfpa.org/vi/publications?fbclid=IwAR1ATCd8JRZQK7CSlr3NY04uJYK0Xkysw3h_FpU0tdDohK5ywPOWo4bwKjc](https://vietnam.unfpa.org/vi/publications?fbclid=IwAR1ATCd8JRZQK7CSlr3NY04uJYK0Xkysw3h_FpU0tdDohK5ywPOWo4bwKjc)

² <https://www.helpage.org/what-we-do/post2015-process/>

³ UN, a country is defined as “aging” when the share of people aged 65+ is above 7%, “aged” when it is 14% or more, and “super-aged” when it exceeds 21%, for 60* will be 10%, 20%, 30%

⁴ WHO, Global Strategy and Action Plan on Ageing and Health, 2016

⁵ UN, World population Ageing 2015: UNFPA, State of World Population, 2015



Viet Nam has officially entered the "ageing phase" since 2011⁶; by 2019, the elderly population accounted for 11.86% of the population⁷. It is forecast that the proportion of elderly people will increase to 16.53% in 2029 and to 24.88% in 2049⁸. Viet Nam is one of the most rapidly ageing countries in the world. While it took several decades for developed countries to transition from aging to aged population, for instance France (115 years), Australia (73 years), it is estimated to take only 26 years for Viet Nam⁹.

The plan under Decision 403/ QD-BYT clearly defines: "Increasing life expectancy is one of the crucial achievements in socio-economic development in general and health care in particular. However, rapid population aging will also bring in mounting challenges for social assistance system, workforce and employment, transportation, entertainment and recreation, ... especially the elderly health care system in our country".

From a market development perspective, with rising income and a growing economy, these challenges and problems for the system are potential business opportunities for the development of services for the elderly in Vietnam. However, a preliminary screening found that the supply for elderly care service in Vietnam is still quite fragmented and scattered, remarkable under-developed compared to the diverse and fast emerging demands, especially with higher pressure in the context of the COVID-19 pandemic. Recognizing this potential, Vietnam Chamber of Commerce and Industry, branch in Ho Chi Minh City (VCCI-HCM) with the support of the United Nations Population Fund (UNFPA) and financial support from the Government of Japan, decided to conduct an assessment on potential needs and market outlook for elderly care service to determine the market development potential of elderly care services. The key research questions focus on current and future needs of the elderly and availability of these services in their neighborhoods to identify any demand-supply gaps for each service, with additional analysis based on gender, location, age, current generation of elderly people and the next generation (who will become the elderly in the future).

The results of this study are expected to provide a useful reference for state management agencies, service centers, service providers and the elderly, with the aim of facilitating the participation of the business community in developing and improving the quality of services for the elderly in the coming time. With this in mind, the study findings and this report focus on proposing business and service models that help build directions for businesses to leverage this potential and fast-growing market.

⁶ GSO, Results of the 2011 Population and Family Planning Survey, the rate of elderly people 65+ is 7%

⁷ GSO, Concensus 2019

⁸ GSO (2020), Population Forecast, 2019-2069

⁹ World Bank, live longer and prosper, 2016

2. RESEARCH METHODOLOGY

The initial design for the research included:

- Desk-study: literature review, (documents, reports, statistics); study and analyze documents, reports of a number of developed countries to identify some current needs and to predict future needs along with the trend of increasing incomes and living conditions;
- Primary data collection and by:
 - o Qualitative data through in-depth interviews with experts, key informants from Ministry of Health, Ministry of Labour, Invalids and Social Affairs, elderly care service providers;
 - o Surveying and interviewing the elderly in some areas and some facilities for the care and treatment of the elderly throughout the country.
- Gap analysis for shortages between demand forecast and supply capacity, thereby identifying opportunities for intervention, investment, and provision of products and services for different market segments and regions.

However, due to the impact of the 4th wave of the covid pandemic, primary data collection by direct visits to some elderly care facilities could not be realized. The modified alternative method is mapping with a quantitative survey using a simple and online questionnaire to capture an initial understanding of local needs and services.

The review team developed a questionnaire ANNEX 1.) on a google form and shared it through social media channels and other networks, using a team of local collaborators to assist with the interviews. In order to support the elderly to participate in the responses, the interview guide clearly states that questions 1-2 need to record and reflect truly opinions from the elderly, then self-assess their own needs and review the supply of health care services in these areas.

Although this online survey could help to enable fast outreach with more than 300

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