Aditya GROUP

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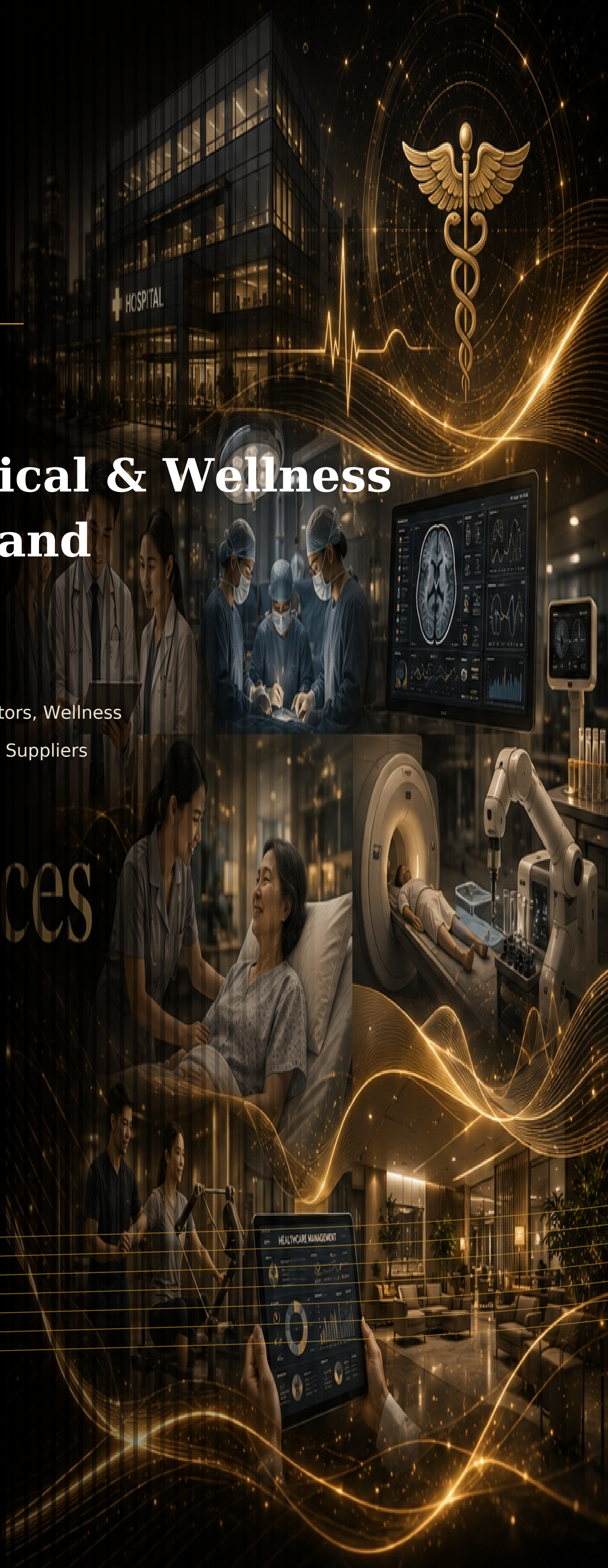
INDUSTRY INTELLIGENCE SERIES

Healthcare, Medical & Wellness Services in Thailand

Strategic Market Report

For Healthcare Investors, Medical Service Operators, Wellness Platforms, HealthTech Firms and Medical-Device Suppliers

Thailand | 2026 Website Edition



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1. Executive Summary

Thailand's healthcare, medical and wellness services industry is moving from a hospital-led medical tourism story to a broader health-economy platform. The market now includes private hospitals, specialty clinics, health check-ups, rehabilitation, elderly care, wellness retreats, aesthetic medicine, home-care services, medical devices, health technology, insurance-linked services and hospitality-integrated wellness journeys. [1] [2]

BOI positions Thailand as a globally recognised healthcare and wellness destination. Its healthcare services market is projected to rise from USD 18.3 billion in 2024 to more than USD 26.6 billion by 2030 at around 5% CAGR, while private-sector spending is expected to grow faster than public spending. [1]

The industry's credibility is supported by clinical infrastructure and international service capability. BOI cites 65 JCI-accredited medical facilities as of 18 November 2025, and government communications highlight Thailand's 2025-2034 medical-hub strategy, designed to develop the country into an integrated medical-industry centre. [1] [2]

At the same time, the sector requires careful execution. Healthcare is trust-sensitive, regulated, relationship-driven and operationally complex. Foreign investors and service providers must assess licensing, ownership structure, clinical governance, Thai FDA requirements, professional staffing, insurance linkages, location strategy, quality assurance, patient-acquisition economics and local partner reliability.

Strategic theme	Implication for investors and operators
Medical hub, not just hospitals	Growth is shifting toward integrated healthcare, wellness, diagnostics, rehabilitation, elderly services and cross-border patient journeys.
Premium private care	Private hospitals and specialty clinics continue to attract Thai middle/upper-income patients and international visitors, but competition is intense.
Wellness convergence	Preventive health, anti-ageing, longevity, spa, nutrition, sleep, mental wellness and rehabilitation are becoming part of the broader healthcare proposition.
Ageing society demand	Chronic disease, elderly support, home-care devices, rehabilitation, mobility products and health monitoring are structural opportunities.
Execution gap	Many entrants underestimate licensing, Thai-language operations, doctor networks, patient trust, clinical compliance and channel economics.

Aditya Group view The most attractive opportunities are in professionally governed, compliance-ready, partnership-led health and wellness models, not generic "medical tourism" marketing. Foreign entrants need a Thai execution bridge covering market research, partner validation, setup, local representation, supplier networks, regulatory mapping and go-to-market coordination. Healthcare opportunities should be evaluated through both commercial and trust lenses: who owns the patient relationship, who carries clinical accountability, and who controls service quality.

2. Industry Overview

The healthcare, medical and wellness services sector includes curative care, preventive care, rehabilitation, long-term care, clinical support services, medical devices, digital health, wellness tourism and health-adjacent lifestyle services. In Thailand, the industry sits at the intersection of public healthcare, private hospitals, tourism, insurance, real estate, hospitality, medical education, digital infrastructure and government investment promotion.

2.1 Value chain

Layer	Examples	Key economics and success factors
Primary and preventive care	Check-ups, screenings, diagnostics, chronic disease management, vaccinations, lifestyle medicine	Trust, convenience, doctor access, preventive packages, data continuity and insurance linkage.
Private hospitals and specialty care	Tertiary hospitals, surgery, oncology, orthopaedics, cardiology, dental, fertility, aesthetic medicine	Clinical reputation, JCI/quality systems, specialist networks, international patient services and pricing transparency.
Wellness and rehabilitation	Wellness resorts, spa, physiotherapy, sleep programs, nutrition, longevity, anti-ageing, post-operative care	Hospitality-quality service design, outcome credibility, safe referral pathways and differentiated positioning.
Elderly and home-care ecosystem	Nursing care, assisted living, home monitoring, mobility support, rehabilitation devices, family support	Staff training, regulatory compliance, family trust, service reliability and emergency escalation.
Medical products and technology	Medical devices, health monitors, hospital systems, telemedicine, cybersecurity, AI diagnostics support, wearables	Thai FDA pathway, technical service, data protection, channel access and after-sales support.

2.2 Sector boundaries

Healthcare services: hospitals, outpatient clinics, diagnostic centres, dental clinics, specialty clinics and rehabilitation providers.

Medical wellness: health check-ups, longevity, preventive care, anti-ageing, integrative medicine, spa and wellness retreats linked to clinical or semi-clinical services.

Medical products: medical devices, consumables, home-care devices, mobility aids, rehabilitation equipment and diagnostic tools.

Digital health: hospital IT, patient engagement tools, appointment platforms, remote monitoring, electronic records, clinical workflow systems and cybersecurity.

Support ecosystem: insurers, hotels, travel agencies, interpreters, patient coordinators, nursing agencies, real estate operators and family-office support services.

3. Thailand Market Context

Thailand's healthcare proposition is shaped by four structural strengths: relatively advanced private medical infrastructure, a large domestic care base, strong tourism and hospitality capability, and government policy support for the medical-hub agenda. The country's private hospitals are experienced in serving both domestic premium patients and cross-border visitors, while wellness services benefit from Thailand's hospitality culture and spa reputation. [1] [2]

Government communications state that travellers in Thailand's medical and wellness segment spend an average of THB 107,662 per person per trip, around 102.67% more than general tourists. This illustrates why the sector is strategically important not only for hospitals but also for hotels, wellness resorts, travel agencies, insurance partners and premium service providers. [2]

The market is also underpinned by demographic change. Krungsri Research notes that Thailand remains on track to become a super-aged society by 2033, creating demand for chronic-disease management, home-care devices, health monitors, mobility aids and rehabilitation equipment. [3]

Market driver	What it means in practice
Ageing population	Higher demand for NCD management, rehabilitation, long-term care, home-care services and elderly-friendly products.
Medical tourism recovery	International patient flows support premium hospitals, dental, cosmetic, wellness, check-up and post-treatment recovery services.
Preventive health awareness	Growth in check-ups, longevity programs, nutrition, fitness diagnostics, sleep management and corporate wellness.
Digital adoption	Hospitals and clinics need stronger CRM, appointment systems, cybersecurity, patient data governance and remote care tools.
Hospitality integration	Hotels, resorts and travel operators can package wellness, recovery, check-ups and high-value health journeys.

4. Market Intelligence & Key Trends

4.1 From treatment to lifetime health management

Thailand's health economy is expanding beyond acute treatment into prevention, rehabilitation and long-term management. Investors should therefore evaluate recurring-care models, memberships, chronic-care programs, preventive screening, wellness packages and family-led healthcare support, rather than viewing the sector as a one-time patient transaction.

4.2 Medical tourism becoming more specialised

Thailand's medical tourism proposition is shifting from broad affordability to more specialised, trusted care journeys. Government messaging highlights specialisation, Gulf and regional cooperation, beauty and anti-ageing, medical innovation and partnerships across airlines, hotels, spas, rehabilitation centres, travel agencies and insurers. [2]

4.3 HealthTech and hospital digitalisation

Healthcare operators increasingly need appointment automation, patient relationship management, secure medical data handling, digital payments, remote monitoring, cybersecurity, AI-supported workflows and operational analytics. However, adoption depends on clinical governance, PDPA compliance, change management and integration with existing hospital systems.

4.4 Medical devices and home-care demand

Krungsri Research expects domestic medical-device sales to grow around 2.0-3.0% annually in 2026-2027, with opportunities linked to ageing, rehabilitation, home-health monitoring, mobility aids, wearables and emergency/first-aid equipment. [3]

4.5 Wellness moving upmarket

Wellness is becoming more evidence-sensitive. High-value customers increasingly expect credible programs, not only spa experiences. This favours operators that can combine hospitality design with measurable outcomes, qualified professionals, differentiated treatments, nutrition, sleep, rehabilitation, diagnostics and safe referral partnerships.

Trend	Opportunity	Execution requirement
Longevity and preventive care	Check-up packages, nutrition, biological-age testing, sleep and metabolic programs	Credible clinical partners, safe claims, clear protocols and premium service design.
Elderly and family health support	Assisted living, nursing coordination, home-care support, rehabilitation and family concierge services	Staff quality, trust, privacy, emergency protocols and recurring service management.
International patient journeys	Dental, aesthetic, orthopaedic, cardiology, fertility, wellness recovery and executive check-ups	Patient acquisition, multilingual support, hotel/travel integration and transparent pricing.
Medical devices and health monitoring	Home BP/glucose monitoring, wearables, mobility aids, rehabilitation equipment	Thai FDA classification, local importer, after-sales support and training.
Clinic and wellness platforms	Specialty clinics, wellness resorts, medical-spa alliances and corporate wellness	Licensing, doctor affiliation, brand trust and operating controls.

4.6 Customer-segment intelligence

Customer segment	Primary need	Commercial implication
Thai affluent families	Trusted specialists, discreet service, preventive screening, elderly coordination and fast access	High relationship value; requires Thai-language service, family trust and clear escalation routes.
International medical tourists	Quality treatment, transparent pricing, travel support, accommodation, recovery and follow-up	Requires bundled journey design, multilingual support, hospital coordination and response discipline.
Corporate employers	Health checks, wellness programs, mental wellbeing, executive health and productivity-linked outcomes	Requires measurable packages, HR-friendly reporting, privacy safeguards and repeatable service delivery.
Hospitals and clinics	Technology, devices, patient acquisition, operations, compliance and supplier reliability	B2B sales cycles require decision-maker mapping, product validation and after-sales commitments.
Hotels and resorts	Wellness differentiation, medical partnerships, premium guest programs and recovery stays	Needs careful partner selection, service design, insurance clarity and guest-safety protocols.

4.7 Strategic opportunity heatmap

Segment	Demand strength	Entry complexity	Aditya Group assessment
Executive check-ups and preventive health	High	Medium	Strong fit where hospitals/clinics need premium packaging, corporate access and international patient support.
Wellness retreats with medical adjacency	High	Medium	Strong fit when positioned around credible partners, safe claims and high-value travel experiences.
Elderly support and home-care coordination	High	Medium-High	Long-term opportunity driven by ageing and family trust; requires operating discipline and vetted caregivers.
Medical devices and home monitoring	Medium-High	High	Attractive for distribution/sourcing, but Thai FDA, training and after-sales capability are mandatory.
HealthTech software	Medium-High	High	Good fit for Arahant/technology capabilities; requires pilot proof, cybersecurity and hospital stakeholder mapping.

Segment	Demand strength	Entry complexity	Aditya Group assessment
Generic spa/wellness services	Medium	Low-Medium	Crowded market; only attractive with distinctive concept, location, outcomes and hospitality integration.

5. Opportunity Landscape

Thailand offers opportunities for both investors entering the market and existing operators seeking growth. The strongest prospects are where clinical credibility, customer experience, operational discipline and partnership execution converge.

Opportunity area	Potential users / investors	Why Thailand is relevant
Specialty clinics	Foreign medical groups, doctors, investors, aesthetic and dental operators	Thailand has strong private healthcare demand, international patients and high service expectations.
Medical wellness and recovery	Hotels, resorts, wellness brands, hospitals, travel companies	Thailand can combine clinical access, hospitality, spa, food, travel and long-stay recovery.
Elderly care and home-care services	Care operators, family offices, insurers, medical-device suppliers	Ageing demographics and affluent families create demand for reliable, discreet and professional support.
Medical devices and consumables	Device manufacturers, distributors, hospital suppliers, home-care brands	Ageing, chronic disease, rehabilitation and hospital upgrades create recurring demand.
HealthTech and hospital IT	Software vendors, cybersecurity firms, cloud providers, CRM and workflow platforms	Hospitals and clinics need digital modernisation but require local adaptation and trust.
Medical tourism partnerships	Hospitals, hotels, insurers, travel agencies, concierge operators	Higher-spending medical/wellness visitors require bundled, coordinated experiences.

> Most practical entry points Start with market validation: customer segment, price band, regulatory pathway, partner ecosystem and realistic sales cycle. Build a credible local model before scaling: pilot with trusted partners, controlled service quality and measurable conversion data. Separate wellness marketing from medical claims. The wrong claim can create regulatory, reputational and legal exposure.

5.1 Opportunity-by-business-model view

Business model	Revenue logic	Critical success factors
Clinic / specialty centre	Consultation, procedures, packages, memberships and follow-up care	Doctor brand, facility licence, patient conversion, claims control and quality assurance.
Wellness-resort partnership	Program fees, room revenue, treatment packages, referrals and repeat retreats	Hotel alignment, qualified practitioners, safety protocols, measurable experience and premium positioning.
Medical-device distribution	Importer margin, distributor margin, service contracts, consumables and replacement parts	Registration, hospital access, product training, inventory, service support and documentation.
HealthTech SaaS / implementation	Subscription, implementation fees, support, integration and data services	Hospital stakeholder mapping, cybersecurity, PDPA controls, localisation and ROI proof.
Elderly care coordination	Monthly retainers, caregiver management, emergency support, vendor coordination and family reporting	Trust, background checks, service-level discipline, privacy and escalation design.

5.2 Priority opportunity filters

Does the model solve a specific healthcare or wellness pain point, rather than only relying on Thailand's broad medical-hub reputation?

Can the service be operated legally with the right licences, professionals, claims and supervision?

Is there a clear local partner or channel with access to patients, hospitals, hotels, corporates or distributors?

Can the company explain its quality standard, patient-safety process, data protection and complaint-handling process?

Is the pricing commercially viable after partner margins, marketing costs, staffing, compliance, rent and after-sales obligations?

6. Competitive & Operating Environment

Thailand's private healthcare market is competitive, brand-sensitive and relationship-based. Large hospital groups dominate premium medical care, while specialty clinics compete through doctor reputation, location, technology, celebrity influence, pricing and patient experience. Wellness operators compete through location, brand design, service quality, practitioner credibility and package differentiation.

6.1 Competitive realities

Hospital groups have strong brand equity, doctor networks, insurance relationships and international patient departments.

Specialty clinics can scale faster but face stronger risks around claims, staffing, quality control and patient trust.

Wellness operators must differentiate beyond ambience; credible outcomes, repeatable protocols and professional integration are increasingly important.

Medical-device distributors must manage registration, training, after-sales service, spare parts and hospital procurement relationships.

HealthTech vendors face long sales cycles because healthcare buyers are cautious about data, interoperability and clinical risk.

6.2 Buyer behaviour

Domestic premium patients often choose providers based on doctor reputation, hospital brand, recommendations, convenience, language, insurance coverage and perceived safety. International patients add other criteria: total package cost, visas, travel logistics, accommodation, post-treatment support and trust in the care pathway. Corporate buyers prioritise measurable value, safety, privacy and employee uptake.

7. Regulatory & Compliance Considerations

Healthcare is one of the most compliance-sensitive sectors in Thailand. Licensing and operational requirements vary depending on whether the business is a hospital, clinic, medical-device importer, wellness operator, digital-health provider, insurance-linked service, travel service or advertising/marketing operation. Investors should obtain qualified legal and regulatory advice before committing capital.

Area	Common considerations
Healthcare facility licensing	Hospitals and clinics require appropriate licensing, qualified medical professionals, facility standards, clinical protocols and ongoing regulatory compliance.
Foreign ownership and BOI	Structure must be assessed case by case. BOI incentives may be relevant for certain healthcare, medical technology, digital or R&D activities, but not every service model qualifies.
Medical-device import/manufacture	Thai FDA requires establishment registration for commercial manufacture/import, risk classification and registration according to device class.
Advertising and claims	Medical, device and wellness claims must be carefully reviewed. Thai FDA notes that medical-device advertising requires approval.
Data protection	Patient data, health records and digital-health systems require strict privacy governance and PDPA-aware operating practices.
Professional staffing	Doctor, nurse, therapist and practitioner qualifications, work permits, professional licences and scope of practice must be validated.

Thai FDA states that anyone wishing to manufacture or import medical devices for commercial purposes must register the establishment, determine the device risk classification and follow registration requirements aligned with the ASEAN Medical Device Directive. Advertising medical devices also requires approval. [4]

8. Market Entry & Execution Considerations

A successful entry strategy should begin with clarity on whether the company is entering as an investor, healthcare operator, clinic brand, technology vendor, product supplier, wellness service provider, medical tourism coordinator or strategic partner. Each route has different licensing, ownership, partner and execution requirements.

Entry route	Suitable for	Execution focus
Representative / partner-led entry	Foreign suppliers, wellness brands, HealthTech vendors, device companies	Partner validation, distributor agreement, pricing, compliance mapping and first customer pilots.

Entry route	Suitable for	Execution focus
Company setup and local operating entity	Operators requiring direct control, hiring, local contracting and long-term presence	Company structure, licences, tax, staffing, bank account, office, governance and local management.
Joint venture / strategic alliance	Hospitals, clinics, wellness resorts, medical-tourism operators	Partner due diligence, governance, service standards, revenue model and exit terms.
Acquisition / investment	Investors seeking immediate market access through existing clinics, operators or suppliers	Financial due diligence, licence review, doctor/staff retention, liabilities and integration plan.
Pilot program	HealthTech vendors, device brands, new wellness concepts	Controlled proof-of-concept, clinical or customer validation, compliance review and measurable KPIs.

8.1 Execution checklist

Define target segment: Thai premium patients, mass domestic healthcare, international medical tourists, elderly families, hotels, hospitals or corporate employers.

Map regulatory pathway before marketing: licences, Thai FDA classification, professional requirements, advertising limitations and data obligations.

Validate partner economics: referral fees, distributor margins, hospital procurement cycles, after-sales expectations and marketing cost per lead.

Build trust assets: doctor credentials, case studies, safety protocols, certifications, testimonials, multilingual materials and transparent pricing.

Plan operating controls: complaint handling, emergency escalation, data security, service-level agreements and partner performance reviews.

8.2 Suggested 90-180-365 day execution roadmap

Period	Primary objective	Outputs
First 90 days	Validate opportunity and de-risk market entry	Market scan, regulatory-route memo, competitor map, price benchmarks, partner shortlist and first commercial hypothesis.
90-180 days	Build local model and secure partners	Entity/partner decision, pilot design, commercial terms, compliance checklist, bilingual materials and first target-account outreach.
180-365 days	Scale controlled execution	Pilot results, channel refinement, operating SOPs, reporting dashboard, investor/board review and expansion decision.

8.3 Decision criteria before investment

Question	Why it matters
Who legally provides the healthcare service?	Determines licensing, liability, claims, staffing and patient accountability.
Who owns the patient or customer relationship?	Defines revenue control, data access, referrals, repeat business and brand risk.
What evidence supports the claims being made?	Healthcare and wellness claims affect trust, regulatory exposure and marketing approval.
How will emergencies and complaints be handled?	Patient safety and reputation require clear escalation, documentation and governance.
What is the real unit economics after all local costs?	Margins are often overstated before referral fees, rent, staffing, marketing, compliance and service costs.

9. Risks, Challenges & Watchpoints

Risk	Why it matters	Mitigation approach
Regulatory misclassification	A product or service may fall under medical-device, healthcare facility, clinic, advertisement or professional-practice rules.	Conduct early regulatory screening and avoid public claims before classification is clear.

Risk	Why it matters	Mitigation approach
Weak local partner selection	The wrong distributor, clinic partner or service provider can damage trust and delay market entry.	Use structured due diligence, reference checks, pilot KPIs and clear contract controls.
Overpromising wellness outcomes	Unverified claims can create reputational, regulatory and legal exposure.	Use evidence-based language and separate wellness positioning from medical claims.
Clinical governance gaps	Healthcare quality failures can have serious consequences beyond commercial loss.	Define accountability, escalation, professional supervision and quality documentation.
Patient acquisition cost	Medical and wellness leads can be expensive and conversion depends on trust and response speed.	Use segment-specific funnels, referral partnerships and content-backed authority.
Data and privacy exposure	Health data is sensitive and breaches can damage trust severely.	Implement PDPA-aware data handling, cybersecurity controls and limited-access protocols.

Common mistakes Treating healthcare as a standard consumer service without recognising licensing, claims, professional accountability and trust sensitivity. Entering through one enthusiastic partner without checking market access, compliance capacity and financial alignment. Building a "medical tourism" offer without hospital coordination, aftercare, travel logistics, transparent pricing and emergency protocols.

10. Aditya Group Perspective

Healthcare and wellness in Thailand should be approached as an execution-led opportunity, not only a branding opportunity. The market is attractive because Thailand has real strengths in hospitals, hospitality, wellness culture, international service delivery and policy direction. However, the gap between concept and commercial success is often wide.

The winning models are likely to be those that combine: strong trust architecture, clear regulatory positioning, focused customer segment selection, partner discipline, practical operating controls and localised execution. This is especially true for foreign entrants who may underestimate language, relationship, licensing and buyer-behaviour differences.

For Aditya Group, the sector connects naturally with market entry, business matching, technology, travel, premium family support, sourcing, medical-device distribution, wellness-product development and executive advisory. The opportunity is not to replace medical experts, but to help companies build the commercial, operational and local execution layer around qualified healthcare and wellness providers.

11. How Aditya Group Can Support

Client need	Aditya Group support
Market intelligence and opportunity assessment	Segment sizing, buyer mapping, competitor scan, regulatory-route screening, pricing benchmarks and channel analysis.
Thailand entry strategy	Entry model selection, company setup roadmap, BOI relevance review, partner strategy and staged execution plan.
Business matching and partnerships	Hospital, clinic, wellness, hotel, distributor, insurer, travel and service-provider identification with structured outreach.
Medical-device and health-product entry support	Importer/distributor mapping, Thai FDA pathway coordination through qualified specialists, pricing and after-sales model review.
HealthTech and enterprise software support	Hospital/clinic buyer mapping, pilot design, cybersecurity positioning, local representation and implementation coordination.
Wellness and medical tourism packages	Partnership model design across hospitals, hotels, wellness providers, concierge support and travel coordination.
Execution oversight	Project governance, vendor coordination, milestone control, local troubleshooting and management reporting.

11.1 Practical support modules

Healthcare market-entry diagnostic: 2-4 week review of opportunity, compliance route, partners, cost assumptions and go/no-go issues.

Partner validation sprint: shortlist, screen and qualify hospitals, clinics, wellness operators, distributors or service providers.

Pilot-to-market program: convert a concept into a controlled market pilot with KPIs, pricing, service flow and partner governance.

Thailand representative model: provide local coordination for foreign suppliers, service providers and investors that need a credible execution bridge.

12. Selected Relevant Experience

Aditya Group's relevant experience is strongest in cross-sector execution: market entry, sourcing, technology distribution, enterprise software, travel, hospitality, trading, partner development and business setup. In healthcare and wellness, the group's value lies in bringing structured execution capability to a sector where specialist medical advice must be combined with local commercial discipline.

Experience area	Relevance to this industry
Market-entry advisory in Thailand	Useful for foreign healthcare, wellness, medical-device and technology companies assessing setup, partner and distribution options.
Technology and enterprise software	Relevant to hospital IT, cybersecurity, patient engagement, CRM, workflow digitisation and HealthTech market access.
Travel and hospitality services	Relevant to medical tourism, wellness packages, premium travel, recovery stays and international patient journeys.
Trading and sourcing	Relevant to medical consumables, wellness products, packaging, hospitality supplies and cross-border procurement.
Private-client and family support concepts	Relevant to elderly-care coordination, family health support, household-level medical logistics and premium concierge models.

Note: Specific client references should be selected carefully for website publication to protect confidentiality and avoid implying medical endorsement unless formally approved.

13. Conclusion & Call to Action

Thailand's healthcare, medical and wellness services sector offers strong long-term potential, but it rewards disciplined execution. The market is attractive because of ageing demographics, private healthcare capability, medical-tourism demand, wellness credibility, hospital infrastructure and policy support. Yet successful entry requires more than demand analysis. It requires compliance planning, partner validation, credible positioning, patient trust and operational control.

Companies entering Thailand should start with a structured opportunity review before committing to setup, marketing or partnerships. The strongest strategies will define a narrow target segment, validate local economics, identify regulatory constraints, select trustworthy partners and build a phased execution roadmap.

> Recommended next step Request a Healthcare & Wellness Industry Discussion with Aditya Group. Use this report as a board-level starting point, then commission a market-entry diagnostic for your specific service, product or investment model. Explore related Aditya Group reports on Travel, Tourism & Hospitality; Personal Care, Spa & Wellness; Information Technology & Enterprise Software; and Export-Import & International Trade.

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Build the Right Thailand Entry Strategy

Aditya Group helps clients evaluate market potential, identify partners, structure practical entry routes and coordinate local execution in Thailand.

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Website: www.adityagroupthailand.com **Email:** contact@adityagroupthailand.com