

## **Japan Minimally Invasive Surgery Devices Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

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### **Report description:**

The Japanese minimally invasive surgery devices market is expected to register a CAGR of 5.5% over the forecast period.

The COVID-19 pandemic impacted the growth of the market. The lockdown measures and restrictions imposed by the government disrupted the supply chain activities and suspended non-urgent scheduled visits and hospitalizations, which affected the demand for minimally invasive surgical devices during the pandemic. Canceling elective procedures to avoid the spread of COVID-19 and reserving resources for COVID patients has slowed down the market's growth. An article published in the Surgical Today Journal in January 2022 observed that most surgical procedures, such as oncological and cardiovascular procedures, decreased in 2020 in Japan, and the overall decline in the surgery rate was 10%-15%. Thus, the decreased surgical procedures have impacted the demand for surgical devices and monitoring devices used for minimally invasive surgeries. However, with the release restrictions and resumed surgical procedures, the market studied is expected to grow over the forecast period.

Certain factors propelling the market's growth are the increasing prevalence of lifestyle-related and chronic disorders, technological advancements, and the rising geriatric population in Japan.

Minimally invasive surgical (MIS) procedures have several advantages over conventional procedures, such as less post-operative pain, fewer major operative and post-operative complications, faster recovery times, less scarring, less stress on the immune system, and smaller incisions. These benefits of minimally invasive procedures reduce the overall hospital and the cost of the treatment, due to which MIS procedures are being preferred, which is expected to drive the market's growth.

The growing prevalence of chronic diseases such as cancer and cardiovascular diseases, among others, is driving the demand for surgical procedures for treatment, augmenting the growth of the market. For instance, according to the GLOBOCAN 2020 report,

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Japan reported 1,028,658 new cancer cases (599,243 new cancer cases in males and 429,415 new cancer cases in females) in 2020. The same report projected the number of cancer cases to reach 1,110,549 by 2030 and 1,128,057 by 2040. Thus, the increasing burden of cancer among Japanese people increases the demand for surgical procedures, which is expected to increase the demand for surgical devices, thereby boosting the market's growth.

According to the 2022 statistics published by IDF, 11 million people were living with diabetes in 2021 in Japan. In addition, this number is projected to increase by 2030. The high blood sugar caused by diabetes can damage the nerves that control the heart and blood vessels, leading to cardiovascular diseases like coronary artery disease and stroke, narrowing the arteries. This is anticipated to boost the demand for surgical procedures, fueling the demand for minimally invasive surgical devices.

New product launches and approvals due to technological advancements, collaborations, mergers, and acquisitions are the key strategic initiatives undertaken by the industry players, which are expected to drive the market's growth. For instance, in August 2022, Abbott Laboratories launched a TactiFlex SE irrigation catheter, a radiofrequency (RF) ablation catheter with a slit tip electrode with contact force technology, in Japan. In March 2022, Japan's PMDA approved Shockwave Medical's Shockwave C<sup>2</sup> Coronary Intravascular Lithotripsy (IVL) Catheter. In May 2021, Japan Lifeline and Galaxy Medical entered into an exclusive distribution agreement for the ALPHA1 ablation catheter in the United States. Under the terms of the agreement, Galaxy pursues US regulatory approval for ALPHA1 in support of the eventual commercialization of the CENTAURI PEF System.

However, the shortage of experienced professionals is expected to hinder the market's growth over the forecast period.

#### Japan Minimally Invasive Surgery Devices Market Trends

##### Gastrointestinal Segment Expects to Register a High CAGR Over the Forecast Period

The gastrointestinal segment is expected to witness significant growth in the minimally invasive surgery market over the forecast period due to the factors such as the rising incidence of gastrointestinal diseases among the population.

The major diseases associated with the gastrointestinal system are irritable bowel syndrome (IBS), Crohn's disease, peptic ulcers, and others.

The high burden of gastrointestinal diseases is the major factor driving the growth of the segment. For instance, an article published in the Journal of Anus, Rectum, and Colon in January 2020 observed that 180,000 patients were suffering from ulcerative colitis and 40,000 from Crohn's disease in Japan in 2020. Thus, the high number of people suffering from ulcerative colitis raises the need for surgery to remove the colon and lining of the rectum. This is anticipated to fuel the demand for advanced surgical devices, propelling the market's growth.

The high prevalence of cancer related to the gastrointestinal tract, such as colon and rectum cancers, is expected to drive the demand for minimally invasive procedures, augmenting the market's growth over the forecast period. For instance, as per GLOBOCAN 2020 factsheet, 99,862 new cases of colon and 46,940 cases of rectum cancer were reported in Japan in 2020. Thus, the rising burden of colon and rectum cancers is anticipated to increase the adoption of minimally invasive surgeries such as laparoscopic or robot surgery, which is expected to augment the segment's growth over the forecast period.

The rising company activities in developing minimally-invasive devices and increasing product launches contribute to the market's growth. For instance, in April 2022, Ambu Inc. received CE clearance for its Ambu aScope Gastro and Ambu aBox 2 in Japan. This helps the company expand the global launch of its single-use gastroscope and next-generation display ecosystem to include Europe and Japan. In January 2021, NEC Corporation launched WISE VISION Endoscopy, an AI diagnosis-support medical device software for colonoscopies, in Japan. In November 2021, the Shinmatsudo Central General Hospital in Matsudo, Japan, entered into

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an agreement with Asensus Surgical, Inc., to lease and utilize a Senhance Surgical System, a digital laparoscopic platform that leverages augmented intelligence to provide unmatched performance and patient outcomes through machine learning.

Thus, owing to the aforementioned factors, the segment studied is expected to grow significantly during the forecast period.

#### Robotic-Assisted Surgical System Segment is Expected to Have the Significant Market Share Over the Forecast Period

The robotic-assisted surgical systems segment is expected to grow over the forecast period owing to the factors such as the rising prevalence of chronic diseases, rising technological advancements, and the rising company focus on developing advanced products in the country.

The rising burden of cancer and other orthopedic diseases among the population is expected to increase the demand for robotic surgery that provides a clear view of the deep tissues and structures. This is anticipated to fuel the segment's growth over the forecast period. For instance, as per an article published in PLOS One, in August 2021, more than 25,000 new cases of renal cell carcinoma were reported in Japan in 2020, which is projected to increase to 30,000 by 2030. Thus, the high burden of kidney cancer among the population increases the need for effective treatment procedures, raising the demand for robots to perform complex surgeries and propelling the market's growth.

According to an article published in the Journal of Orthopaedic Science in September 2021, about 4052 knee arthroplasties are expected to be performed on men between the ages of 40 and 64 years, 6942 on men between the ages of 65 and 74 years, 14,986 on men over 75 years in Japan by 2030. In addition, as per the same source, about 7092 knee arthroplasties are expected to be performed on women between the ages of 40 and 64 years, 22,957 on women between the ages of 65 and 74 years, and 58,340 on women over 75 years in Japan by 2030. Thus, the expected increase in knee surgeries among the population increases the demand for robots to perform knee replacement surgeries to avoid certain complications and provide more precise surgical results. This is anticipated to augment the market's growth over the forecast period.

Increasing adoption of robotic-assisted surgery systems and increased awareness of the advantages of minimally invasive procedures are expected to boost the market's growth over the forecast period. For instance, in August 2020, Mediaroid Corp received health ministry approval to manufacture and sell a robotic-assisted surgery system, the hinotori surgical system, in Japan. In February 2022, Smith+Nephew launched a next-generation handheld robotics platform, the CORI Surgical System, in Japan. The robotic system combines 3-D intraoperative imagery with a sophisticated robotic precision milling tool to sculpt the bone and preserve structure during ligament-sparing surgeries.

The rising product approvals in the country are expected to increase the availability of robotic surgical systems in the market. This is anticipated to raise its adoption during complex surgeries, thereby propelling the market's growth. For instance, in September 2022, Japan's Ministry of Health, Labour, and Welfare (MHLW) approved Intuitive's da Vinci SP, the first robotic surgical system for use in general surgeries, thoracic surgeries, urologic surgeries, gynecological surgeries, and trans-oral head and neck surgeries. The system offers surgeons robotic-assisted technology designed for confined access to body tissue.

Thus, owing to the aforementioned factors, the segment studied is expected to grow significantly during the forecast period.

#### Japan Minimally Invasive Surgery Devices Market Competitor Analysis

The Japanese minimally invasive surgery devices market is consolidated, owing to the presence of a few key players in the market. The companies are focusing on adopting various business strategies such as mergers, acquisitions, product launches, product approvals, and collaborations to withhold their position in the minimally invasive surgery devices market. Some of the market players are GE Healthcare, Koninklijke Philips NV, Medtronic PLC, Olympus Corporation, Siemens Healthineers, Smith &

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Nephew, and others.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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