

Japan Hospital Supplies Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The Japan hospital supplies market is expected to register a CAGR of 6.9% over the forecast period.

COVID-19 significantly impacted the hospital supplies market and the entire healthcare industry in Japan during the initial phases, as the shortage of hospital devices, needles, and syringes led to a problematic situation due to the upsurge of the large patient pool. For instance, as per the February 2021 report by NPR, Japan struggled to obtain special syringes to maximize the number of COVID-19 vaccine shots used from each vial. Even though manufacturers strained to ramp up production rapidly, it still prompts concerns that millions of doses might go to waste. However, in the post-pandemic situation, the market is growing and likely to witness more growth in the coming years. The demand for hospital supplies is supported by increased infectious diseases, hospital-acquired infections, and surgical site infections prevalent in Japan in the post-pandemic era.

The factors, such as increased incidences of communal diseases and growing public awareness about the conditions, will likely increase the Japan hospital supplies market. For instance, according to a Plos One article published in January 2022, influenza, pharyngoconjunctival fever, group A streptococcal pharyngitis, chicken pox, erythema infectiosum, epidemic keratoconjunctivitis, Mycoplasma pneumoniae pneumonia, and pertussis, showed an epidemic in Japan before COVID-19. Furthermore, the presence of competitors, product launches, and collaboration in Japan relating to hospital supplies will likely boost market growth over the forecast period. Similarly, in September 2021, 10,000 pulse oximeters and 1,008 oxygen concentrators were donated to Japan which was staged by the Ministry of Foreign Affairs in Taipei City, underscoring the government's commitment to helping the East Asian country. The hospital supply market demand is also rising due to the increasing geriatric population. As the geriatric population is more prone to infection and diseases, this factor is expected to positively impact Japan's hospital supplies market. For instance, as per the Statistics Bureau of Japan, in 2021, the aged population (65 years old and over) was 36.21 million, constituting 28.9% of the total population (i.e., 1 in every four persons) and marking a high record.

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Hence, due to the rise in infectious diseases and rapid expansion of healthcare infrastructure, Japan's hospital supplies market is likely to witness growth over the forecast period. However, stringent regulations by approval authorities and the emergence of homecare services have been restraining the market growth.

Japan Hospital Supplies Market Trends

Sterilization and Disinfectant Products Segment is Expected to Register High Growth in the Forecast Period

Disinfection is the process of eliminating or reducing harmful microorganisms from inanimate objects and surfaces. Sterilization kills all microorganisms, destroying the spores of various organisms on surfaces, in liquids, in medication, or in compounds such as biological culture media.

Sterilization and disinfectant products are necessary for hospitals to prevent the spreading of diseases like hospital-acquired infections (HAI). In addition, the geriatric population is more prone to chronic diseases. Thus, Japan's rising geriatric population that acquires chronic diseases leads to increased hospital admissions. For instance, according to the Japan Statistics Bureau 2022 update, the composition of age distribution above 65 is estimated to be 38.1% by 2060. Moreover, as per the article published in June 2022 in Hindawi, the medical records of the 1,485 hospitalized patients in a tertiary Hospital in Shanghai showed that most of the patients were affected with hospital-acquired infections compared to nosocomial diseases. Hence, the market will likely witness growth in the coming years due to Japan's high prevalence of hospital-acquired infections.

Furthermore, government initiatives and funding relating to the disinfection and sterilization field are anticipated to boost market growth over the forecast period. For instance, in July 2022, the Government of Japan granted additional funding to the GARDP to support its vital work in developing new treatments for drug-resistant infections. The budget is anticipated to support GARDP's work in developing treatments for hospital-acquired infections, sexually transmitted infections, and infections in newborns. Japan provided over USD 1.8 million in funding to GARDP from April 2022 to March 2023. Additionally, key players are implementing strategic plans such as product launches, mergers, and acquisitions to boost market growth over the forecast period. For instance, in January 2021, IKEUCHI launched a new fogging device named Dry-Fog HIGHNOW (DFH) for quick, easy, and effective disinfection. It is a backpack-type disinfection device that sprays a disinfectant solution, "Dry Fog," with a mean droplet size of 10 µm or less using a special nozzle patented by IKEUCHI. Unlike conventional sprayers that produce coarse droplets, spraying a disinfectant solution using DFH makes it possible to thoroughly apply the disinfectant to hard-to-reach small gaps and blind spots.

Thus, due to the rise in hospital-acquired infections, the increase in the geriatric population, and the surge in disinfection product launches, the segment studied is anticipated to witness growth over the forecast period.

Syringes and Needles Segment is Anticipated to Witness a Notable Growth in the Japan Hospital Supplies Market Over the Forecast Period

The syringes and needles segment is anticipated to witness growth in the Japan hospital supplies market owing to the factors such as a rise in infectious diseases that require vaccinations, an increase in healthcare expenditure, and a rise in product launches in Japan. For instance, as per the NIID Japan 2022 surveillance update, 1,738 cumulative cases of tuberculosis were reported in Tokyo in 2022. As the number of infectious diseases increases, the demand for immunization rises, thereby driving the syringes and needles segment growth over the forecast period.

Furthermore, product launches, collaborations, and partnerships regarding the sale and availability of needles and syringes are anticipated to boost market growth over the forecast period. For instance, in March 2021, Terumo Corp. developed a syringe that extracts seven shots from a vial of the COVID-19 vaccine, compared to five shots using existing syringes. Furthermore, the rise in

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vaccinations and immunization in the studied region is anticipated to promote the growth of the syringes and needles market. For instance, according to Our World In Data October 2022 update, 95% of children under one were immunized with the BCG vaccination in Japan in 2021.

Hence, due to the infectious diseases increase and the increase in vaccination and immunization programs, the syringes and needle segment is anticipated to witness growth in the market over the forecast period.

Japan Hospital Supplies Market Competitor Analysis

The Japanese hospital supplies market is fragmented due to several companies operating globally and regionally. Japan is a developed country and has trade relations with other developed nations. As a result, it enjoys the presence of most of the global players in the Japan hospital supplies market. Moreover, some domestic Japanese companies also have a presence in the hospital supplies market. Other global players have made the Japanese market competitive for hospital supplies. Some significant players include 3M, Medtronic, Cardinal Health, Boston Scientific Corporation, and B. Braun SE, among others.

Additional Benefits:

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

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