

Japan Digital X-Ray - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Japan Digital X-Ray Market size is expected to grow from USD 560.8 million in 2024 to USD 885.08 million by 2029, at a CAGR of 9.54% during the forecast period (2024-2029).

The COVID pandemic has significantly impacted the digital X-ray market since chest X-rays were widely taken for detecting the complications in the lungs that mostly occurred during the pandemic. For instance, as per the article published in December 2022 in Springer, the researchers from Japan demonstrated that, since COVID-19 cases presented radiological findings of pneumonia, radiologic examinations can be useful for fast detection. Chest radiography was, therefore, used to quickly screen for COVID-19 during patient triage, helping overburdened hospitals in a pandemic situation by identifying priority in patient care. Due to this, the pandemic had a significant impact on the market studied. In the current scenario, the majority of diagnostic and screening facilities have returned to regular operations and are rescheduling screening appointments for patients who missed diagnostic scans owing to the emergency in Japan. As a result, substantial future growth is anticipated for the digital X-ray devices market.

The market for digital X-ray devices is expanding in Japan due to factors such as the growing prevalence of chronic diseases, technological advancements in the field of imaging, etc. Investments from various organizations are also contributing to the growth of the studied market. For instance, according to the Cancer Statistics in Japan 2022, 127,400 cases of lung cancer were diagnosed in 2021 in Japan. Thus, a high prevalence of lung cancer is expected to bolster the demand for digital X-rays in Japan over the forecast period. Furthermore, numerous advancements are happening in the market for digital X-rays, including new launches and approvals, partnerships, collaborations, mergers, and acquisitions, which are expected to bolster the market growth in Japan. For instance, in August 2021, a mobile X-ray system, "MobileArt Evolution MX8 Version," was introduced to the Japanese and international markets by Shimadzu Corporation. The MobileArt Evolution MX8 Version makes radiography possible for patients

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who have difficulty moving to an X-ray room by bringing the system to the patient's bedside. Patients with heart conditions benefit more from these gadgets. Hence, the above developments are further expected to improve the market growth in the forecast period.

Thus, owing to the increase in cancer cases and the rise in strategic product launches with advanced technologies, the studied market is expected to witness significant growth over the forecast period. However, the high cost of the equipment is expected to restrain the market growth over the forecast period.

Japan Digital X-Ray Market Trends

Cancer Segment is Expected to Hold a Significant Market Share Over the Forecast Period

The rise in the prevalence of cancer disorders, increase in technological developments, and more applications of digital X-ray equipment in diagnosing different types of cancer cases are the major factors attributing to the growth of this segment in Japan. For instance, according to the Cancer Statistics in Japan 2022, the number of incidence of cancer cases in Japan was approximately 1 million in 2021. Prostate cancer was the most common cancer for males, followed by stomach, colon, lung, and liver cancers. The most common cancer in females was breast cancer, followed by colon, lung, stomach, and uterus. Hence, a high incidence of cancer cases in Japan is expected to increase the demand for digital X-ray systems, thereby contributing to market growth.

The market for digital X-rays is witnessing a number of advancements in Japan, including new launches and partnerships, which is thereby expected to foster the growth of the market. For instance, in September 2021, Shimadzu Corporation unveiled the new Xslicer SMX-1010 and SMX-1020 microfocus X-ray inspection devices in Japan and other countries. With a vertical emission X-ray configuration, a 90 KV microfocus X-ray generator, and a high-resolution flat panel detector, both X-ray inspection systems are built for a wide range of applications. Furthermore, various government initiatives are actively engaged in cancer digital X-ray support, which is expected to augment the market growth over the forecast period. According to the 2023 update from the Lung Cancer Policy Network, Japan has offered chest X-ray screening to people aged 40 or older, with LDCT screening commonly performed on a voluntary basis. In 2021, over 20,000 participants had enrolled from across 25 prefectures in Japan, including the Tokyo metropolitan area, and follow-up is expected to end in 2035. Such strategic alliances and government initiatives are expected to bolster the production of digital X-ray devices in the country, making them available across all healthcare facilities, including diagnostic centers.

Thus, it is anticipated that the introduction of such cutting-edge technical innovations and the rise in cancer cases in Japan are likely to further enhance market expansion in this sector.

Portable Segment is Expected to Witness a Significant Growth Over the Forecast Period

A portable X-ray device is a wireless digital X-ray imaging device for mobile health providers, such as doctors and first-aid workers in field situations, during home care, and in nursing homes and hospitals. Portable digital X-ray systems directly convert the transmitted X-ray radiation into a digital image using an array of solid-state detectors, such as amorphous selenium or silicon and display the image directly on the computer. The digital X-ray emits very little radiation than analog (traditional) X-rays, making it highly safer. The images produced by the digital system are of high quality. They are produced immediately after the procedure, thus reducing the waiting time.

The portable segment is expected to witness significant growth in the studied market owing to the rise in the geriatric population, the launch of technologically advanced products, and the surge in chronic diseases in Japan. According to the September 2022 report published by the Internal Affairs Ministry of Japan, as of September 2022, the population of elderly people aged 65 and over

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was 36.27 million, which was an increase of 60,000 compared to the previous year (36.21 million), reaching a record high. Hence, the presence of a high geriatric population and continuous increase in their number is expected to play a significant role in the growth of portable digital X-ray devices in Japan over the forecast period. Furthermore, an increase in strategic activities by the key players in Japan is expected to bolster market growth over the forecast period. For instance, in March 2022, Konica Minolta, Inc., launched AeroDR TX m01, a mobile X-ray system featuring a wireless dynamic digital radiography function in Japan. AeroDR TX m01 is a mobile X-ray system with dynamic digital radiography capability at the bedside in intensive care units (ICUs), hospital wards, and operating rooms. It offers dynamic radiography in addition to conventional static radiography without having to transfer a patient to an X-ray room.

Thus, owing to the increase in the geriatric population and various product launches, the studied segment is expected to witness significant market growth over the forecast period.

Japan Digital X-Ray Industry Overview

Japan's digital X-ray market is moderately competitive and consists of several major players. Some of the companies that are currently dominating the market are Canon (Canon Medical Systems Corporation), Siemens Healthineers AG, GE Healthcare, Fujifilm Holdings Corporation, and Koninklijke Philips NV, among others.

Additional Benefits:

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

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