

Japan Endoscopy Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2021 - 2029

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Report description:

The Japan Endoscopy Devices Market size is estimated at USD 2.76 billion in 2024, and is expected to reach USD 3.94 billion by 2029, growing at a CAGR of 7.39% during the forecast period (2024-2029).

The COVID-19 pandemic disrupted not only the research and development activities of other therapies and drugs for medical conditions other than COVID-19 but also impacted the treatment procedures and supply chain of medical devices around the world, which also impacted the studied market of endoscopy devices. According to a study published by WHO in September 2022, during the pandemic period, the number of endoscopies decreased during the pandemic period, and cancellations of endoscopy procedures also increased during this initial phase of the pandemic. In addition, endoscopic procedures in Japan rely on patient protective equipment, comprehensive room, equipment cleaning, and air circulation, which varies from endoscopy suites. Such reduction of endoscopy procedures in Japan during the pandemic period had a significant impact on the growth of the market. However, the resumption of endoscopy procedures during the post-pandemic period after the relaxation of strict lockdown regulations in Japan is expected to drive the growth of the market over the forecast period.

The growing preference for minimally invasive surgeries, increasing cases of diseases such as gastroenterology leading to the increasing adoption of endoscopes for treatment and diagnosis, and technological advancements leading to enhanced applications are the major factors leading to the growth of the endoscopic market.

As per the NCBI article published in October 2021, Japan has the highest prevalence of inflammatory bowel disease in Asia. The report also mentioned that the prevalence of ulcerative colitis was 172.9 per 1,00,000 people in Japan and Crohn's disease was 55.6 per 1,00,000 people. Therefore, the increasing number of cases of gastroenterology diseases in Japan is expected to increase the demand for endoscopic devices owing to the early and effective diagnostics, thereby boosting the growth of the market over

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the forecast period.

Moreover, the increasing development of various advanced endoscopy devices in Japan is also expected to drive the growth of the market. For instance, in January 2021, NEC Corporation announced the development of "WISE VISION Endoscopy," an AI diagnosis-support medical device software for colonoscopies, which was released in Japan. This software connects with existing endoscopy equipment as part of using AI to automatically mark potential lesions from images taken during endoscopic procedures.

Thus, owing to the above-mentioned factors, such as the rising prevalence of diseases leading to early and effective diagnostics and increasing product developments, the Japan endoscopy devices market is expected to show significant growth over the forecast period. However, the lack of skilled technicians and infections caused by few endoscopes is hindering the market growth.

Japan Endoscopy Devices Market Trends

Gynecology segment is Estimated to Witness a Healthy Growth in Future

Endoscopy devices in gynecology are estimated to witness healthy growth in the future. The high growth of the gynecology segment is attributed to the high demand for gynecologic laparoscopic procedures and minimally-invasive procedures. A pelvic laparoscopy can examine the uterus, ovaries, and fallopian tubes. These devices are also used for fibroids removal, uterus, ovarian cysts, lymph nodes, an ectopic pregnancy, and detection of cancer of the ovary, uterus, and cervix.

As per an NCBI article published in 2021, more than 10,000 women in Japan suffer from ovarian cancer annually. Therefore, with the rising burden of gynecologic cancer and the rising demand for these devices, the market is expected to witness rapid growth over the forecast period.

Moreover, as per the Springer study article published in August 2022, the combination of Caparo/endoscopic and posterior sagittal approach ensured a tumor-free macroscopic surgical margin with easier, cosmetically pleasing vaginal reconstruction while preserving the anorectal and urinary functions. The study believed this approach could be utilized not only for vaginal yolk sac tumors (YST) but also for any vaginal tumor, especially those arising from the posterior or lateral wall. Thus, the various advantage of the endoscopic approach to cure gynecological cancer is expected to boost the growth of the market segment over the forecast period.

Thus, owing to the above-mentioned factors, such as rising gynecological disorders and the effectiveness of endoscopy in various gynecological, the studied segment is expected to grow during the forecast period.

Cardiology is Expected to Hold a Notable Market Share Over the Forecast Period

Cardiopulmonary endoscopy is simple, safe, and effective in examining the cardiac chambers and the pulmonary arterial system. It can be performed with a sterilized flexible fibreoptic endoscope. It facilitates pulmonary embolectomy and precludes procedures and maneuvers that can cause serious complications.

The growing prevalence of various cardiovascular disorders, the rising geriatric population in Japan, and the increasing demand for endoscopy devices. For instance, according to the National Cerebral and Cardiovascular Center, Japan, in December 2021, the number of heart failure patients in Japan in 2020 was estimated to be approximately 1.2 million. In addition, according to the same source, the prevalence rate of cardiovascular diseases increases with age, and the number of heart failure patients is expected to increase further in Japan. Such a high prevalence of heart failure patients in Japan is anticipated to increase the demand for endoscopy procedures.

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On the other hand, the increasing geriatric population, who are prone to develop various cardiovascular diseases leading to the demand for effective endoscopy procedures, is also expected to drive the growth of the market. For instance, in the JTC article published in September 2022, Japan's population aged over 75 years contributes to over 15% of the total population, and those over 65 years are 29.1% of the total population. Thus, the rising prevalence of various cardiovascular diseases and the rising geriatric population who are prone to develop cardiovascular diseases are expected to drive the demand for endoscopy procedures, thereby fueling the market growth in Japan over the forecast period.

Japan Endoscopy Devices Industry Overview

The Japan Endoscopy Devices Market is moderately competitive and consists of several major players. Some of the companies which are currently dominating the market are Boston Scientific Corporation, Johnson and Johnson, Medtronic PLC, Olympus Corporation, Cook Group Incorporated, KARL STORZ, Conmed Corporation, Fujifilm Holdings Corporation, and Richard Wolf GmbH.

Additional Benefits:

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

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