

Japan Respiratory Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Japan respiratory devices market is expected to register a CAGR of 9.6% over the forecast period.

The outbreak of the pandemic positively impacted the Japanese respiratory devices market. For instance, according to a study by the Japanese Respiratory Society published in July 2021, persons with underlying respiratory disease were more susceptible to COVID-19 infection and mortality. It also stated that among COVID-19 patients, the prevalence of asthma, chronic obstructive pulmonary disease (COPD), and interstitial lung diseases (ILD) was 3.4%, 4.8%, and 1.5%, respectively. Furthermore, it also reported that COVID-19 patients having chronic obstructive pulmonary disease or interstitial lung diseases had relatively high mortality, especially for interstitial lung diseases. Therefore, such instances indicate that the demand for respiratory devices increased during the pandemic in Japan; thereby, the market witnessed considerable growth during COVID-19. However, currently, the market has reached its pre-pandemic nature in terms of demand for respiratory devices and is expected to witness strong growth in the coming years.

The key factors propelling the market growth include the increasing prevalence of respiratory disorders and technological advancements in the devices. For instance, as per the study from PubMed published in June 2021, the prevalence of chronic obstructive pulmonary disease (COPD) in Japan was around 8.6-10.9%. Similarly, as per the article from MDPI Journal published in August 2022, compared to a prevalence of 7.9-17.0% among adults in their 30s in the general population, the prevalence of sleep apnea was unexpectedly high at 14.0-86.5% in Japan during 2022. Respiratory devices generally help patients in need of support for breathing, removal of carbon dioxide, and therapy to reduce disuse atrophy of abdominal wall muscles. Therefore, increasing cases of respiratory diseases are expected to surge the demand for respiratory devices, thereby propelling the market growth over the forecast period.

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However, the high cost of equipment is likely to hinder the market growth over the forecast period.

Japan Respiratory Devices Market Trends

Inhalers Segment is Expected to Witness Strong Growth Over the Forecast Period

An inhaler is a device used to deliver medication to the lungs and airways. It is mainly used to treat or prevent respiratory diseases such as asthma, chronic obstructive pulmonary disease (COPD), or cystic fibrosis. Inhalers are medications that are inhaled through the mouth and into the lungs, which helps to relax the muscles that tighten around the airways. Inhalers help to open up the airways, allow more air to move in and out of the lungs, and help the patient breathe more easily.

The increasing cases of respiratory diseases such as hay fever and chronic obstructive pulmonary disease (COPD) are the major factors propelling the segment's growth. In Japan, the most prevalent respiratory allergy in the country is Hay fever, which is caused due to the cedar pollen spread throughout the country. For instance, according to the article published in January 2022, it was estimated that 25.0 million people were found suffering from hay fever in Japan.

The advantages of inhalers over drugs are propelling their demand among the general population. For instance, inhalers allow an instant application of medicine to the airways, providing quick relief. It also comes with a portable size, making it convenient to carry and easy to use. In June 2022, Iconovo, one of the key companies in respiratory inhalers, launched its ICOone inhaler in Japan. With such new launches, the segment is believed to witness healthy growth in the coming years.

In addition, increasing respiratory syncytial virus infections among children in Japan is also one of the major drivers propelling market growth. For instance, according to a study from PubMed published in February 2022, it was observed that respiratory syncytial virus (RSV) is one of the most common causes of lower respiratory tract infections in children aged five years and above. RSV imposes a significant burden on the Japanese healthcare system. Therefore, the increasing burden of such diseases is anticipated to increase the demand for inhalers in Japan, thereby propelling the segment growth over the forecast period.

CPAP Devices are Believed to Grow Significantly in the Coming Years

A Continuous Positive Airway Pressure (CPAP) machine is used for treating sleep apnea, which is one of the common respiratory diseases. The device uses a hose connected to a mask or nosepiece to deliver constant and steady air pressure to help a person breathe while asleep.

The high prevalence of sleep apnea and the increasing use of CPAP devices in the country is leading to segment growth. For instance, as per the PubMed data published in February 2022, it was observed that the prevalence of sleep apnea in Japan was around 9% in males and 3% in females as of 2022. The data further stated that the burden of sleep apnea is drastically increasing in the country, which is acting as a growth promoter for the CPAP devices segment.

Additionally, as per the Springer Journal data published in November 2021, continuous positive airway pressure (CPAP) therapy for Sleep Apnea Syndrome (SAS) was being used by more than 500,000 patients in Japan during 2021. This high number of people using CPAP devices indicates that there is a well-established market for the same.

Additionally, the presence of key companies providing CPAP products is contributing to the market growth in Japan. For instance, ResMed provides an advanced portfolio of CPAP devices in Japan and has a strong presence in the country.

Therefore, owing to the above-mentioned factors, the segment is believed to witness strong growth in Japan over the forecast period.

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Japan Respiratory Devices Industry Overview

The Japanese respiratory devices market is moderately competitive and fragmented in nature, with several major players. Some of the strategies implemented include agreements, collaborative models, business expansion, and product development. The competitive landscape includes an analysis of a few international as well as local companies that hold a significant market share, including Drägerwerk AG, Fisher & Paykel Healthcare Ltd, GE Healthcare, Getinge AB, Terumo Corporation, and Koninklijke Philips NV.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

- 4.1 Market Overview
- 4.2 Market Drivers
 - 4.2.1 Increasing Prevalence of Respiratory Disorders
 - 4.2.2 Technological Advancements in the Devices
- 4.3 Market Restraints
 - 4.3.1 High Cost of Equipment
- 4.4 Porter's Five Forces Analysis
 - 4.4.1 Threat of New Entrants
 - 4.4.2 Bargaining Power of Buyers/Consumers
 - 4.4.3 Bargaining Power of Suppliers
 - 4.4.4 Threat of Substitute Products
 - 4.4.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION (Market Size by Value - USD Million)

- 5.1 By Type
 - 5.1.1 Diagnostic and Monitoring Devices
 - 5.1.1.1 Spirometers
 - 5.1.1.2 Sleep Test Devices
 - 5.1.1.3 Peak Flow Meters
 - 5.1.1.4 Other Diagnostic and Monitoring Devices
 - 5.1.2 Therapeutic Devices
 - 5.1.2.1 Ventilators
 - 5.1.2.2 Inhalers

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- 5.1.2.3 CPAP Devices
- 5.1.2.4 Oxygen Concentrators
- 5.1.2.5 Other Therapeutic Devices
- 5.1.3 Disposables
 - 5.1.3.1 Masks
 - 5.1.3.2 Breathing Circuits
 - 5.1.3.3 Other Disposables

6 COMPETITIVE LANDSCAPE

- 6.1 Company Profiles
 - 6.1.1 CHEST M.I. Inc.
 - 6.1.2 Dragerwerk AG
 - 6.1.3 Fisher & Paykel Healthcare Ltd
 - 6.1.4 GE Healthcare
 - 6.1.5 Getinge AB
 - 6.1.6 Terumo Corporation
 - 6.1.7 Koninklijke Philips NV
 - 6.1.8 Medtronic PLC
 - 6.1.9 ResMed Inc.
 - 6.1.10 Metran Co. Ltd

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

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