

## **Japan Ultrasound Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029**

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### **Report description:**

The Japan Ultrasound Devices Market size is expected to grow from USD 474.18 million in 2024 to USD 600.75 million by 2029, at a CAGR of 6.08% during the forecast period (2024-2029).

The COVID-19 pandemic significantly impacted the ultrasound devices market in Japan, as the diagnostic procedures, including ultrasound procedures for various cardiovascular and gynecological procedures, were greatly affected during the pandemic. Also, fewer elective surgeries occurred during the pandemic, which required ultrasound as an initial diagnostic tool. For instance, according to an article published by PubMed Central in November 2021, the initial COVID-19 pandemic restricted the delivery of standard medical care to surgical patients in Japan. Thus, the pandemic had a significant effect on the market initially. However, the demand for ultrasound devices is expected to remain consistent during the post-pandemic period, thereby boosting the market's growth over the forecast period.

Ultrasound devices are widely used to diagnose cardiovascular diseases, gynecological diseases, musculoskeletal diseases, and cancer, among others; thus, with Japan's rising chronic disease burden, the demand for ultrasound devices is expected to grow over the forecast period. For instance, according to an article published by THE LANCET Regional Health in November 2022, a study was conducted in Japan in 2021, which showed that the country has a high burden of cardiovascular diseases such as stroke, among others. Moreover, according to an article published by SpringerLink in January 2023, a study was conducted in Japan, which showed that the weighted prevalence of cardiovascular diseases and atherosclerosis in the study population was 37.3% and 33.5%, respectively. The source also stated that carotid artery disease, coronary heart disease, and cerebrovascular diseases were among the most common subtypes of cardiovascular diseases.

Moreover, according to an article published by BMC Musculoskeletal Disorders in August 2022, a study was conducted in Japan

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which showed that the pooled prevalence of chronic musculoskeletal pain was 39.0% in Japan, among which the majority in men was 36.3% and women 41.8%, and the prevalence increased with age. Thus, the high prevalence of such chronic diseases, along with the rising geriatric population in Japan, is expected to enhance the usage of an ultrasound devices for diagnosis, thus driving the market growth.

Additionally, the rising developments by key players and various organizations, such as agreements, partnerships, product launches, and acquisitions, are also expected to enhance the market growth, as they are expected to increase access to technologically advanced products in Japan. For instance, in January 2021, Olympus Corporation and Hitachi, Ltd. signed a five-year contract in Tokyo to develop endoscopic ultrasound systems (EUS) jointly. Hitachi would also continue to supply diagnostic ultrasound systems and related parts used in EUS to Olympus under this contract.

Thus, the factors mentioned above, such as the high prevalence of chronic diseases in Japan and the rising developments, are expected to boost market growth. However, stringent regulations are expected to impede the growth of the market.

#### Japan Ultrasound Devices Market Trends

##### Portable Ultrasounds Segment is Expected to Hold a Significant Market Share Over the Forecast Period

Portable ultrasound machines are also known as mobile ultrasound systems, and they are designed to be used in small spaces, at a patient's bedside, or directly in the diagnostic field. They provide the advantages of mobility and affordability, accurate and instant diagnosis, improved patient throughput, and ease of access over stationary ultrasound devices, which makes them a better choice for any healthcare provider.

The major factors driving the growth of the portable ultrasounds segment include advanced technology used in these devices, the rising prevalence of cancer and cardiovascular diseases that require point-of-care diagnosis, and rising awareness regarding the availability of portable ultrasounds. For instance, according to the data published by National Cancer Center Japan in June 2022, it was estimated that 1,019 thousand new cases of cancer were expected in Japan in 2022, out of which 158 thousand new cases of colon/rectum cancer, 132 thousand cases of stomach cancer, and 128 thousand cases of lung/trachea cancer were expected.

Moreover, the increased activity by crucial players in developing technologically advanced products is also expected to enhance segment growth. For instance, in November 2021, Canon Medical supported Japan's iLEAD (innovative Liver, Elasticity, Attenuation, and Dispersion) study. It is a multicenter study to evaluate quantitative ultrasound imaging tools against liver biopsy. It is available on the Aplio I series portable ultrasound system's Liver Package for assessing steatosis, fibrosis, and inflammation in the clinical environment. Hence, such studies are expected to increase the scope of usage of portable ultrasound systems, thus boosting market growth.

Thus, the factors mentioned above, such as the high prevalence of cancer and cardiovascular diseases in Japan and the increased activity by key players for developing technologically advanced products, are expected to increase the usage of the portable ultrasound system, thus boosting segment growth.

##### Cardiology Segment is Expected to Hold a Significant Share in the Market Over the Forecast Period

Cardiovascular diseases such as heart failure, cardiac murmur, ischemic heart disease, and acute pulmonary artery thromboembolism are often diagnosed by ultrasound devices. The increasing prevalence of such diseases in Japan and the rising geriatric population in the country is expected to boost the segment growth. For instance, according to an article published by the Journal of American Heart Association in November 2021, the Japanese population has a high risk of developing cardiovascular

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diseases in their lifetime. Thus, the high burden of cardiovascular diseases in the country is expected to boost the usage of ultrasound devices.

Moreover, the high geriatric population in the country is also expected to boost market growth as cardiovascular diseases are often associated with older people, which is expected to increase the usage of ultrasound devices. For instance, according to the 2022 White Paper on Ageing Society, published in 2022, Japan's population aged 65 and over stood at just over 36.21 million in 2022, accounting for 28.9% of the total population. This number is expected to peak at 39.35 million by 2024. Hence, with the high geriatric population in the country, the prevalence of cardiovascular diseases is also likely to increase, which is expected to increase the usage of ultrasound devices.

Thus, the factors mentioned above, such as the high prevalence of cardiovascular diseases in Japan and the rising geriatric population, are expected to boost segment growth. These factors are estimated to increase the usage of ultrasound devices in the country.

## Japan Ultrasound Devices Industry Overview

Japan's ultrasound devices market is highly competitive and consists of several major players. Some of the key companies in the market are 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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