

Japan Dental Consumables Market Assessment, By Product [Dental Restoration Products, Dental Restoration Materials, Other Dental Consumables], By Orthodontics [Clear Aligners/Removable Braces, Fixed Braces], By Periodontics [Dental Anesthetics, Dental Hemostats, Dental Sutures], By Endodontics [Shaping and Cleaning Consumables, Access Preparation Consumables, Obturation Consumables], By End-user [Hospitals, Clinics, Others] By Region, Opportunities and Forecast, FY2017-FY2031F

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Report description:

Japan dental consumables market size was valued at USD 3.01 billion in FY2023, and is expected to reach USD 4.96 billion in FY2031, with a CAGR of 6.45% for the forecast period between FY2024 and FY2031. The dental consumables market in Japan has been a pivotal segment in the broader healthcare industry, consistently evolving and adapting to technological advancements and shifting consumer needs. Characterized by a high level of innovation and a robust healthcare infrastructure, Japan's dental consumables market has shown remarkable growth and is poised for further expansion.

Several factors are contributing to the growth of Japan dental consumables market. The rising prevalence of dental diseases, coupled with an aging population that is increasingly aware of oral health, has led to a surge in demand for various dental consumables. Additionally, the growing adoption of preventive and cosmetic dental procedures among the Japanese population has significantly boosted the consumption of products such as dental implants, prosthetics, orthodontics, and endodontics. Moreover, technological advancements and the integration of digital dentistry have revolutionized the landscape of dental care in Japan. The introduction of advanced materials, such as CAD/CAM systems and 3D printing, has improved treatment precision and

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efficiency, enhancing the overall quality of dental services. The competitive landscape of Japan dental consumables market comprises both domestic and international players. Domestic companies often leverage their technological expertise and understanding of local market preferences, while international manufacturers bring innovative solutions and best global practices. Government initiatives promote oral health awareness, combined with insurance coverage for dental procedures, playing a pivotal role in driving market growth.

Growing Geriatric Population

Japan's population over the age of 75 is growing by around 720 thousand individuals each year to reach 19.37 million, as per 2022 government data, underscoring the nation's swiftly aging demographic. In contrast to other developed nations, the utilization of medical insurance for covering dental expenses is notably high relative to the overall medical insurance coverage. Consequently, the Japanese population has regularly visited dentists, mostly preferring private clinics over public ones.

Japan is a significant destination for dental tourism, attracting global patients seeking high-quality dental care. The trend is further fueled by increasing disposable income, boosting demand for cosmetic dentistry, and orthodontic services. As per a September 2022 publication by Japan's Internal Affairs Ministry, the elderly population aged 65 and above has reached a record high of 36.27 million, indicating a rise of about 60,000 compared to the preceding year (36.21 million). The burgeoning demographic is anticipated to significantly influence the expansion of dental equipment in Japan throughout the projected period due to the continuous increase in their numbers.

Strategic Initiatives By Key Players

Anticipated market growth during the forecast period is likely to be driven by increasing strategic activities among key players in Japan. For instance, in November 2021, Zenyum, a Singapore-based Smile Cosmetics company, extended its operations into Japan. The company provides cost-effective, customized dental products using technology and an expanding network of dentists and orthodontists. These deliberate expansions are forecasted to significantly enhance market growth in the foreseeable future. During August 2021, Kyocera Corporation initiated a business collaboration with Osteon Digital Japan, the Japanese division of Osteon Medical, to establish ongoing sales operations, commencing the sale of personalized dental prosthetics for implants using Osteon Medical's digital technology.

Technological Innovations

Japan dental consumables market has witnessed significant technological advancements aimed at improving patient care and streamlining dental procedures. Innovations in the sector include the development of 3D printing technology, allowing for the fabrication of custom dental implants, prosthetics, and orthodontic devices with precision and speed. Nanotechnology has played a crucial role by enhancing materials used in dental restorations, making them more durable and aesthetically pleasing. Furthermore, the integration of digital dentistry, such as intraoral scanners and CAD/CAM systems, has revolutionized the way dental professionals design and produce crowns, bridges, and other dental restorations. For instance, the collaboration between Holoeyes, Inc., Dental Prediction Co., Ltd., and SoftBank Corp. initiated trials in July 2021 to validate the efficacy of employing XR. The extended reality technology encompasses augmented reality (AR), virtual reality (VR), and mixed reality (MR) integrated with 5G networks to bolster dental surgical procedures. The trials extensively employed these technologies to aid in dental implant procedures, which involve surgically replacing missing teeth. In November 2022, NSK Ltd., a leading Japanese dental equipment manufacturer, revealed its most recent breakthrough: the QuickStopBearing designed for air turbine handpieces, widely used in dental practices globally. The pioneering design in QuickStopBearing aims to improve treatment effectiveness and bolster the safety of air-powered dental instruments.

Impact of COVID-19

The imposition of restrictions to contain the spread of COVID-19 significantly impacted non-COVID medical services in Japan, affecting the work of researchers and pharmaceutical companies. It, in turn, disrupted the development of new ongoing diagnostic and treatment procedures for dental caries, consequently impacting the market. Hospital visits decreased notably during the pandemic's peak when COVID-19 cases surged.

For instance, according to a PubMed article published in October 2022, a survey revealed that 21.5% of Japanese individuals delayed dental visits due to COVID-19. Additionally, dentists were advised to limit their practice to urgent cases, affecting overall dental consultations during the pandemic and subsequently impacting the market. Presently, the market has returned to its pre-pandemic state in terms of demand for dental equipment, given the relaxation of COVID-19 related restrictions. Furthermore,

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it is anticipated that the market will experience substantial growth in the upcoming years due to an increase in dental issues among the population and advancements in dental equipment technology.

Key Players Landscape and Outlook

The dental equipment market in Japan exhibits a moderate level of consolidation. Key players are prioritizing research and development efforts to create durable and innovative products. Over the past few years, significant technological advancements have been evident in the market.

In January 2023, Imagoworks, a prominent South Korean firm renowned for its expertise in AI-powered digital dental solutions, established a distribution partnership with Ci Medical, a dental supplier. The aim of the collaboration was to introduce their Dentbird Solutions software to the Japan dental market. The state-of-the-art web-based CAD program, utilized in over 93 countries, innovates dental prosthesis design through the utilization of artificial intelligence, marking a significant advancement in the field.

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14.9. GC Corporation

14.10. Mitsui & Co.

*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work

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