

Japan Dental Care Market, By Product (General and Diagnostic Equipment, Dental Consumables, Other), By Treatment (Orthodontic, Endodontic, Periodontic, Prosthodontic), By End User (Hospitals, Dental Clinics, Other), By Region, Competition, Opportunities & Forecast, 2020-2030F

Market Report | 2024-08-02 | 82 pages | TechSci Research

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Report description:

Japan Dental Care Market was valued at USD 101.38 million in 2024 and is anticipated to project impressive growth in the forecast period with a CAGR of 6.85% through 2030. The Japan dental care market stands as one of the largest in the Asia-Pacific region, marked by significant market value and consistent growth. This expansion is fueled by demographic shifts, technological advancements, and heightened public awareness of oral health. The market is set for continued growth, bolstered by favorable demographic trends, ongoing technological innovation, and increasing public health awareness. Despite challenges like high costs and workforce shortages, the market's outlook remains positive, driven by innovation, strategic partnerships, and a strong emphasis on preventive and comprehensive dental care.

Key Market Drivers

Advancements in Dental Technology

The adoption of digital radiography and 3D scanning technologies has revolutionized the diagnostic process in dental care. These advanced imaging systems provide high-resolution images and detailed views of dental structures, allowing for accurate diagnosis and treatment planning. Digital imaging reduces the need for retakes due to its precision, minimizing radiation exposure and improving patient safety. The efficiency and clarity provided by these technologies enhance the diagnostic capabilities of dental practitioners, leading to better patient outcomes and higher satisfaction rates.

Computer-Aided Design and Computer-Aided Manufacturing (CAD/CAM) systems are transforming the fabrication of dental restorations. These systems enable the design and production of crowns, bridges, and other dental prostheses with high precision and speed. The integration of CAD/CAM technology reduces the turnaround time for dental restorations, allowing for same-day treatments in some cases. This efficiency not only improves patient experience but also boosts the productivity of dental

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practices, contributing to market growth. Intraoral cameras are another significant advancement that enhances diagnostic accuracy and patient communication. These small, handheld devices capture detailed images of the inside of the mouth, which can be displayed on a monitor for both the dentist and patient to see. This visual aid helps in explaining diagnoses, treatment options, and progress, fostering better patient understanding and trust. The ability to document conditions and treatments with high-quality images also aids in maintaining accurate patient records. The use of lasers in dental procedures is gaining popularity due to their precision and minimally invasive nature. Laser technology is employed for a variety of treatments, including cavity preparation, gum disease treatment, and soft tissue surgeries. Lasers reduce the need for drills and scalpels, leading to less pain, bleeding, and swelling, and faster recovery times. The patient-friendly nature of laser dentistry attracts more individuals to seek dental care, thereby driving market growth. Air abrasion techniques, which use a stream of fine particles to remove tooth decay, offer a minimally invasive alternative to traditional drilling. This method preserves more healthy tooth structure and reduces patient discomfort. Micro dentistry, focusing on the smallest possible intervention, aligns with the growing patient preference for less invasive procedures. These advancements enhance patient comfort and outcomes, encouraging more people to undergo necessary dental treatments. Japan's success in niche healthcare fields, particularly dental care, is largely attributed to its advanced technological capabilities and stringent regulations that create a protective environment for domestic firms. Sun Medical, a leading company in dental materials, addresses Japan's healthcare challenges by emphasizing preventive medicine. Japan is developing some of the most renowned solutions in the global healthcare industry. In the dental sector, Nissin Dental exemplifies this innovation as a worldwide leader in dental education and equipment, offering gum disease models and robots for dental training.

The implementation of EHR systems in dental practices streamlines the management of patient information, improving efficiency and accuracy. EHR systems facilitate easy access to patient histories, treatment plans, and diagnostic images, enabling seamless coordination of care. The digitization of records reduces administrative burdens, minimizes errors, and enhances data security. Improved practice management through EHR systems allows dental professionals to focus more on patient care, thus driving practice growth and market expansion. Tele-dentistry is an emerging trend that leverages digital communication technologies to provide dental care remotely. This innovation is particularly beneficial in extending care to underserved areas and improving accessibility. Tele-dentistry enables remote consultations, follow-up appointments, and real-time collaboration between dental professionals. This convenience increases patient engagement and adherence to treatment plans, ultimately improving oral health outcomes and expanding the reach of dental services. The integration of artificial intelligence (AI) and machine learning in dental care is enhancing diagnostic accuracy and treatment planning. AI algorithms can analyze diagnostic images, identify patterns, and predict outcomes with high precision. Machine learning models assist in developing personalized treatment plans based on patient data. These technologies support dental professionals in making informed decisions, reducing diagnostic errors, and optimizing treatment effectiveness. The adoption of AI and machine learning drives innovation and efficiency in dental care, attracting more patients to seek advanced treatments.

VR and AR technologies are being used to enhance dental education and patient experience. VR simulations provide immersive training environments for dental students, improving their skills and preparedness. AR applications enable dentists to overlay digital information onto the physical world, aiding in precise treatment execution. For patients, VR can offer distraction during procedures, reducing anxiety and discomfort. These technologies improve both the educational process for professionals and the treatment experience for patients, contributing to market growth. Advanced communication tools, including interactive software and mobile applications, are being used to educate patients about their oral health and treatment options. These tools facilitate better understanding and engagement, empowering patients to make informed decisions about their care. Enhanced patient education leads to higher treatment acceptance rates and better adherence to preventive care practices, fostering overall market growth.

Growing Awareness and Focus on Oral Health

Growing awareness about oral health in Japan is significantly driven by government and public health campaigns that emphasize the importance of preventive dental care. These initiatives educate the population on the benefits of regular dental check-ups, proper oral hygiene practices, and early detection of dental issues. Campaigns often include school-based dental programs, community outreach, and media coverage, which collectively increase public knowledge and encourage proactive dental care. As a result, more individuals seek regular dental services, driving the demand for preventive treatments and boosting market growth.

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In Japan, many schools have incorporated dental health education into their curriculum. These programs teach children about the importance of maintaining oral hygiene from a young age, instilling lifelong habits that contribute to better oral health. Regular dental screenings and fluoride treatments provided in schools further promote preventive care. The emphasis on early education helps reduce the incidence of dental diseases and increases the overall demand for dental services. Companies in Japan are increasingly adopting workplace wellness programs that include dental health components. These programs offer employees dental check-ups, cleanings, and educational sessions about maintaining oral health. By integrating dental care into workplace health initiatives, employers not only contribute to the well-being of their staff but also drive the overall demand for dental services. In Japan, there are 158 schools offering a 3-year dental hygiene education program and 13 schools offering a 4-year dental hygiene education program. According to the International Federation of Dental Hygienists, there are 291,910 dental hygienists in Japan. As a super-aged society, Japan places significant importance on the role of dental hygienists in promoting oral health. This study aims to analyze the status of dental hygienists in Japan, focusing on their history, core curriculum, national examination, work roles, and workplaces.

There is a growing trend towards cosmetic dentistry in Japan, driven by increasing awareness of dental aesthetics and the desire for an improved personal appearance. More individuals are seeking treatments such as teeth whitening, veneers, orthodontics, and dental implants to enhance their smiles. The rising demand for these elective procedures contributes significantly to the growth of the dental care market. The influence of social media and digital platforms has heightened the focus on personal appearance and aesthetics. People are more conscious of their smiles and overall dental aesthetics due to the prevalence of photo-sharing and self-promotion on social media. This societal shift towards valuing aesthetics increases the demand for cosmetic dental treatments, driving market expansion. Advancements in cosmetic dental technologies and materials have made treatments more effective and accessible. Innovations such as clear aligners for orthodontics, advanced bonding materials for veneers, and laser teeth whitening offer improved results with less discomfort and downtime. These technological improvements make cosmetic procedures more appealing to a broader audience, further driving market growth. Increasing awareness of the connection between oral health and overall well-being is a major driver of the Japan dental care market. Research linking poor oral health to systemic conditions such as cardiovascular disease, diabetes, and respiratory infections has raised public awareness about the importance of maintaining good oral hygiene. This heightened awareness encourages more people to prioritize dental care as part of their overall health regimen. As the population becomes more health-conscious, individuals are more likely to seek information about the best practices for maintaining oral health. This includes understanding the benefits of preventive care, the risks of neglecting dental health, and the latest advancements in dental treatments. Informed decision-making leads to increased utilization of dental services, driving market growth. The shift towards preventive care and health consciousness has resulted in more people scheduling regular dental visits. Routine check-ups and cleanings help in early detection and treatment of dental issues, preventing them from escalating into more serious conditions. The increase in regular dental visits boosts the demand for routine dental services and contributes to market growth.

There is a growing trend towards integrating oral health into general healthcare, recognizing the interdependence between dental and overall health. Medical professionals and dental practitioners are increasingly collaborating to provide comprehensive care that addresses both oral and systemic health issues. This integrated approach enhances the quality of care and encourages patients to take a more holistic view of their health, driving demand for dental services. Efforts to expand insurance coverage for preventive dental care have also contributed to market growth. Insurance policies that cover routine check-ups, cleanings, and basic treatments reduce the financial burden on patients, making preventive care more accessible. Improved insurance coverage encourages more individuals to seek regular dental care, supporting the overall growth of the market. Corporate health plans that include dental benefits are becoming more common. These plans often cover preventive care and basic treatments, making it easier for employees to access dental services. The inclusion of dental benefits in corporate health plans drives demand for dental care, as employees take advantage of the coverage provided.

Aging Population and Increasing Dental Care Needs

As life expectancy increases, people are living longer and, consequently, requiring dental care for a more extended period. Maintaining dental health becomes crucial for quality of life in old age, leading to a sustained demand for dental services and products aimed at preserving oral health among the elderly. Age-related dental issues such as tooth loss, gum disease, dry mouth (xerostomia), and oral cancer are prevalent among older adults. These conditions often necessitate regular dental visits, complex

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treatments, and specialized care, thereby driving the demand for various dental services and treatments. The Japan Dental Association is the sole comprehensive organization representing the dental society in Japan, dedicated to protecting the dental and oral health of the population through quality dental care. The organization's goal is to promote oral health, enabling individuals to enjoy good meals with their own mouths throughout their lives. It aims to contribute to the realization of a society characterized by healthy longevity. In recent years, there has been growing recognition of the significant impact of oral health on the occurrence of systemic diseases, leading to a better understanding of dentistry. With increasing awareness of the importance of dental care, the Japan Dental Association believes that an excellent opportunity has arisen to effectively promote the activities of the association and its affiliated prefectural and local dental associations.

Older adults often require restorative dental treatments to address issues such as tooth decay, fractures, and tooth loss. Procedures like crowns, bridges, dentures, and dental implants are essential for restoring function and aesthetics. The high demand for these restorative treatments contributes significantly to market growth. Dental implants have become a preferred solution for tooth loss among the elderly due to their durability and effectiveness in improving oral function and appearance. The rising popularity of dental implants as a long-term solution for edentulism (toothlessness) drives substantial market demand. Gum disease is a common issue among older adults, necessitating specialized periodontal treatments to manage conditions such as periodontitis. These treatments often involve scaling and root planing, surgical interventions, and maintenance therapies, all contributing to increased demand for periodontal services.

The emphasis on preventive care and early intervention is particularly crucial for the elderly, who are more susceptible to dental problems. Regular dental check-ups and cleanings help in the early detection and management of oral health issues, reducing the risk of severe complications. The increased awareness and practice of preventive care among older adults drive the demand for routine dental services. The aging population's need for specialized oral hygiene products, such as high-fluoride toothpaste, interdental brushes, and dry mouth treatments, has also increased. Manufacturers and retailers are expanding their product lines to cater to this growing demand, contributing to market growth. Older adults with dental prostheses, such as dentures and bridges, require regular maintenance and adjustment to ensure proper fit and function. The ongoing need for prosthetic care drives continuous engagement with dental services, supporting market expansion.

The integration of dental care into the overall healthcare management of older adults is becoming more prominent. Medical and dental professionals are increasingly collaborating to address the interconnected aspects of oral and systemic health. This holistic approach ensures that dental care is a vital component of geriatric healthcare, driving demand for comprehensive dental services. Many older adults suffer from chronic conditions such as diabetes, cardiovascular diseases, and osteoporosis, which have direct implications for oral health. The management of these chronic conditions often involves regular dental care to prevent and treat associated oral health issues. The need for coordinated care between medical and dental professionals increases the demand for dental services among the elderly.

Key Market Challenges

High Costs and Limited Insurance Coverage

One of the primary challenges restricting the growth of the Japan dental care market is the high cost associated with dental treatments. Advanced dental procedures such as implants, orthodontics, and cosmetic dentistry can be prohibitively expensive for many patients. These high costs deter a significant portion of the population from seeking necessary dental care, particularly for elective or aesthetic treatments.

Dental insurance coverage in Japan is often limited, with many advanced procedures not fully covered or reimbursed. While basic dental services may be included under national health insurance, patients typically have to bear a substantial portion of the costs for more sophisticated treatments out-of-pocket. This financial burden limits access to comprehensive dental care, particularly among lower-income groups and the elderly, who may have greater dental needs but less financial flexibility. Economic disparities further exacerbate the issue of affordability. Regions with lower economic prosperity may see reduced demand for dental services due to the financial constraints of the local population. This uneven distribution of economic resources impacts the overall growth of the dental care market, with certain areas experiencing stagnation while others, like the affluent Kanto region, continue to thrive.

Shortage of Skilled Dental Professionals

Japan faces a significant challenge with an aging dental workforce. Many experienced dental professionals are approaching

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retirement age, leading to a potential shortage of skilled practitioners. This demographic shift threatens to reduce the availability of high-quality dental care and could strain existing dental services as the demand for care continues to grow, particularly among the aging population.

Attracting and retaining young dental professionals is a persistent challenge. The demanding nature of dental education, coupled with the high costs associated with establishing a dental practice, can deter new entrants into the profession. Additionally, rural and less economically developed regions struggle to attract and retain dental professionals, leading to uneven distribution of dental care services across the country. Ensuring that dental professionals remain current with the latest technological advancements and treatment methodologies requires ongoing investment in training and education. However, the availability of continuous education programs and the willingness of practitioners to invest time and resources into these programs can be limited. This gap in training can hinder the adoption of new technologies and best practices, impacting the overall quality of care.

Regulatory and Bureaucratic Hurdles

The regulatory landscape for dental care in Japan is complex and often cumbersome. Obtaining approvals for new dental products and technologies can be a lengthy and bureaucratic process, delaying their entry into the market. This slow pace of regulatory approval impedes innovation and the rapid adoption of cutting-edge dental technologies, which are crucial for advancing the quality of care.

Compliance with stringent regulations and standards is essential but can be burdensome for dental practitioners and manufacturers. The need to adhere to rigorous safety and quality standards, while necessary for patient protection, can increase operational costs and administrative workload. Smaller dental practices and businesses may find it particularly challenging to navigate these requirements, limiting their ability to expand or innovate. Regulations around dental practice management, including staffing, equipment standards, and facility requirements, can be restrictive. These regulations, while designed to ensure high standards of care, can sometimes limit the flexibility of dental practitioners to adapt their practices to meet changing market demands or to implement innovative service delivery models such as mobile dentistry or tele-dentistry.

Key Market Trends

Digital Transformation and Technological Advancements

The Japan dental care market is experiencing significant growth driven by the adoption of advanced digital technologies. This includes the widespread use of digital imaging systems, such as 3D cone-beam computed tomography (CBCT), intraoral scanners, and CAD/CAM systems. These technologies enhance the precision and efficiency of diagnostics and treatment planning, enabling dental professionals to provide higher quality care. The integration of artificial intelligence (AI) in diagnostic tools and treatment planning further augments the capabilities of dental practitioners, allowing for more accurate and personalized care.

The emergence of tele-dentistry is another key trend. This technology enables remote consultation, diagnosis, and follow-up care, making dental services more accessible, especially in rural areas. Tele-dentistry platforms facilitate real-time communication between patients and dental professionals, reducing the need for in-person visits and improving convenience for patients. AR and VR technologies are revolutionizing dental education and patient consultation. These tools provide immersive training experiences for dental students and help patients better understand their treatment plans through visual simulations. The adoption of AR and VR in dental care enhances both the learning curve for practitioners and the patient experience, driving market growth.

Growing Focus on Preventive and Cosmetic Dentistry

There is an increasing emphasis on preventive dental care in Japan, driven by both public health initiatives and rising health consciousness among the population. Regular dental check-ups, early diagnosis, and interventions are becoming more common, contributing to the overall growth of the dental care market. Preventive care not only helps in maintaining oral health but also reduces the long-term costs associated with treating advanced dental diseases.

The demand for cosmetic dentistry is on the rise, fueled by a growing awareness of the importance of aesthetics and personal appearance. Procedures such as teeth whitening, veneers, dental implants, and orthodontics are gaining popularity. Advances in materials and techniques have made these procedures more effective and accessible, encouraging more people to seek cosmetic dental treatments. This trend is particularly strong among the younger population and urban dwellers who prioritize aesthetics.

The preference for minimally invasive dental procedures is another aspect of the shift towards preventive and cosmetic dentistry. Patients increasingly opt for treatments that offer quicker recovery times, less discomfort, and minimal tissue damage.

Innovations in dental materials and techniques, such as laser dentistry and adhesive bonding, support this trend, making dental

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care less invasive and more patient-friendly.

Segmental Insights

Product Insights

Based on the category of Product, the General and Diagnostic Equipment segment emerged as the dominant in the market for Japan Dental Care in 2024. The General and Diagnostic Equipment segment encompasses a wide range of cutting-edge technologies that are crucial for accurate diagnosis and effective treatment planning. These include digital radiography, intraoral cameras, 3D imaging systems, and CAD/CAM (computer-aided design and computer-aided manufacturing) technology. The adoption of these advanced diagnostic tools allows for early detection of dental issues, precise treatment planning, and improved patient outcomes. The high accuracy and efficiency of these technologies drive their demand among dental practitioners aiming to offer superior patient care.

The rising incidence of dental disorders such as cavities, periodontal disease, and oral cancers in Japan necessitates the use of advanced diagnostic equipment. Early and accurate diagnosis is critical in managing these conditions effectively, leading to increased adoption of diagnostic tools. The aging population in Japan also contributes to a higher prevalence of dental issues, further driving the need for comprehensive diagnostic solutions to cater to the complex dental care requirements of elderly patients. The integration of digital solutions into dental practices has revolutionized the General and Diagnostic Equipment segment. Digital records, electronic health records (EHR), and practice management software enhance the efficiency and accuracy of dental diagnostics. These digital solutions streamline workflows, reduce manual errors, and facilitate seamless communication between dental professionals, thereby improving overall patient care. The widespread adoption of digital tools in the dental sector underpins the dominance of this segment.

There is a growing emphasis on preventive dental care in Japan, which significantly boosts the demand for diagnostic equipment. Regular check-ups and early detection are key components of preventive care, requiring advanced diagnostic tools to identify potential issues before they become severe. This proactive approach to dental health, supported by public health initiatives and awareness campaigns, reinforces the market dominance of the General and Diagnostic Equipment segment. Continuous advancements and innovations in dental technology play a pivotal role in the dominance of the General and Diagnostic Equipment segment. Companies invest heavily in research and development to introduce new and improved diagnostic tools that offer higher precision, reduced radiation exposure, and enhanced patient comfort. Innovations such as AI-powered diagnostic systems and portable imaging devices further expand the capabilities and accessibility of diagnostic equipment, driving their widespread adoption. These factors collectively contribute to the growth of this segment.

Regional Insights

North America emerged as the dominant in the Japan Dental Care market in 2024, holding the largest market share in terms of value. The Kanto region, home to Tokyo, Yokohama, and other major cities, boasts the highest population density in Japan. This urban concentration translates to a larger customer base for dental care services and products. The higher population density also correlates with greater awareness and demand for dental care, driven by an increased focus on personal health and aesthetics among city dwellers. Also, the region's urban infrastructure supports the establishment and operation of numerous dental clinics and specialized care facilities, enhancing accessibility and convenience for patients. Kanto's economic prosperity is a significant factor in its dominance of the dental care market. The region's residents typically have higher disposable incomes compared to other parts of Japan, allowing them to spend more on healthcare, including dental services. This financial capacity extends beyond basic dental care to more advanced and elective treatments such as orthodontics, cosmetic dentistry, and preventative care. The willingness to invest in high-quality dental care supports a thriving market for premium products and services.

The Kanto region benefits from a well-developed healthcare infrastructure, which includes a high concentration of top-tier hospitals, research institutions, and medical universities. This robust infrastructure facilitates the integration of advanced dental technologies and practices. Dental professionals in Kanto have greater access to cutting-edge equipment, continuous education, and specialized training programs, ensuring they are at the forefront of dental innovation. The presence of leading dental schools also means a steady supply of highly qualified dental practitioners. Kanto is a hub for many leading manufacturers and suppliers of dental products and equipment. The proximity of these businesses to the end market ensures a steady supply of the latest dental materials, tools, and technologies. This close relationship between manufacturers and dental care providers fosters innovation and allows for rapid adoption of new products, enhancing the quality and efficiency of dental care services offered in

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the region.

Key Market Players

☐☐. MORITA CORP

☐☐Mani, Inc

☐☐GC International AG

☐☐MITSUI & CO., LTD

☐☐Tokuyama Dental Corporation

☐☐Dentech Corporation

☐☐THE YOSHIDA DENTAL MFG. CO., LTD

☐☐DENTSPLY SIRONA Inc

☐☐Nissin Dental Products INC

☐☐NAKANISHI INC.

Report Scope:

In this report, the Japan Dental Care Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

☐☐Japan Dental Care Market, By Product:

- o General and Diagnostic Equipment
- o Dental Consumables
- o Other

☐☐Japan Dental Care Market, By Treatment:

- o Orthodontic
- o Endodontic
- o Periodontic
- o Prosthodontic

☐☐Japan Dental Care Market, By End User:

- o Hospitals
- o Dental Clinics
- o Other

☐☐Japan Dental Care Market, By Region:

- o Hokkaido
- o Tohoku
- o Kanto
- o Chubu
- o Kansai
- o Chugoku
- o Shikoku
- o Kyushu

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Japan Dental Care Market.

Available Customizations:

Japan Dental Care market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

☐☐Detailed analysis and profiling of additional market players (up to five).

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