

Japan Precision Medicine Market, By Application (Diagnostics, Therapeutics), By End User (Home Care, Hospitals, Clinical Laboratories, Others), By Region, Competition Forecast & Opportunities, 2020-2030F

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Report description:

Japan Precision Medicine Market was valued at USD 450.12 million in 2024 and is anticipated to project robust growth in the forecast period with a CAGR of 10.50% through 2030. The Japan Precision Medicine Market is a rapidly evolving sector within the healthcare industry, distinguished by its emphasis on customizing medical treatments to individual patient profiles based on genetic, molecular, and clinical data. This market is shaped by a combination of technological advancements, shifting healthcare needs, and supportive regulatory frameworks.

The market has demonstrated robust growth, driven by a surge in the adoption of personalized healthcare solutions and continuous technological innovations. Expansion is further supported by the increasing prevalence of chronic diseases, rising patient demand for tailored treatments, and substantial investments in research and development.

Despite facing challenges such as high costs and data privacy concerns, the Japan Precision Medicine Market remains dynamic and poised for continued growth. The sector offers significant opportunities for innovation and advancement, underpinned by ongoing technological progress and a favorable regulatory environment.

Key Market Drivers

Advances in Genomic and Molecular Technologies

Advances in genomic and molecular technologies play a pivotal role in driving the growth of the Japan Precision Medicine Market. These technological advancements enhance the ability to understand, diagnose, and treat diseases with a high degree of personalization, fundamentally transforming healthcare delivery.

The evolution of genomic sequencing technologies, particularly Next-Generation Sequencing (NGS), has revolutionized the field of precision medicine. NGS enables comprehensive and rapid analysis of an individual's entire genome or specific regions of interest, providing critical insights into genetic variations that influence disease susceptibility and treatment responses. Advances in sequencing technologies have significantly reduced the cost of genomic analysis, making it more accessible for clinical

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applications and broadening its use in routine healthcare. NGS allows for the simultaneous sequencing of multiple samples, accelerating the pace of research and clinical diagnostics. This high-throughput capability supports large-scale studies and the development of population-based genetic databases. The ability to perform detailed genomic profiling supports the development of targeted therapies and personalized treatment plans, which drives demand for precision medicine solutions. Molecular diagnostics have seen significant advancements, enabling more precise detection and monitoring of diseases at the molecular level. Technologies such as polymerase chain reaction (PCR), microarrays, and digital droplet PCR have become integral to precision medicine. Enhanced molecular diagnostic tools facilitate early and accurate detection of diseases, including cancers and genetic disorders, leading to timely interventions and improved patient outcomes. Advances in molecular diagnostics aid in the identification of new biomarkers associated with various diseases. These biomarkers are essential for developing targeted therapies and personalized treatment strategies. Molecular diagnostics provide tools for ongoing monitoring of disease progression and treatment response, allowing for dynamic adjustments to therapeutic approaches.

The rise of sophisticated bioinformatics tools has been instrumental in analyzing complex genomic and molecular data. These tools help interpret vast amounts of genetic information, identify relevant patterns, and translate data into actionable insights for personalized medicine. Bioinformatics platforms integrate genomic data with clinical information, enabling a comprehensive understanding of patient profiles and disease mechanisms. This integration supports more accurate diagnosis and treatment planning. Advanced bioinformatics tools employ predictive algorithms to forecast disease risk and treatment outcomes based on genetic and molecular data, enhancing the precision of medical interventions. The insights gained from bioinformatics analyses drive the development of personalized therapies and tailored treatment regimens, fostering market growth.

Technologies such as CRISPR/Cas9 have made significant strides in genetic editing, offering the potential to modify genes with high precision. These advancements open new avenues for treating genetic disorders and developing personalized therapies. Genetic editing technologies enable the development of novel therapies that target specific genetic mutations or disease mechanisms, expanding the scope of precision medicine. The ability to edit genes facilitates research into gene function and disease causation, leading to the discovery of new therapeutic targets and treatment strategies. Genetic editing holds promise for developing personalized treatments tailored to an individual's genetic makeup, driving interest and investment in precision medicine. The integration of various omics technologies-such as genomics, proteomics, metabolomics, and transcriptomics provides a comprehensive view of biological systems and disease processes. Omics technologies offer a holistic approach to understanding disease at multiple levels, from genetic to protein and metabolic profiles. This comprehensive understanding supports the development of more effective and personalized treatments. The integration of omics data enhances cross-disciplinary research, fostering collaborations between genomics, bioinformatics, and clinical sciences to advance precision medicine. Omics-based insights facilitate the creation of customized therapeutic strategies that consider the complete biological context of individual patients.

Increasing Prevalence of Chronic and Complex Diseases

The increasing prevalence of chronic and complex diseases significantly drives the growth of the Japan Precision Medicine Market. As the burden of these conditions rises, the demand for personalized healthcare solutions that can provide more effective and tailored treatment options becomes more pronounced. Chronic and complex diseases, such as cancer, cardiovascular diseases, diabetes, and neurodegenerative disorders, often involve intricate biological mechanisms and varying responses to treatment. Precision medicine offers a personalized approach by tailoring treatment plans based on an individual's genetic, molecular, and clinical profile. Precision medicine enables the development of targeted therapies that address specific genetic mutations or molecular pathways associated with these diseases, leading to more effective treatment outcomes. The rising prevalence of chronic diseases drives pharmaceutical companies to develop drugs that are personalized to patient subgroups, improving efficacy and minimizing adverse effects. There is an increasing need for advanced diagnostic tools that can accurately identify disease subtypes and predict patient responses to various treatments, fueling the demand for precision medicine solutions. In Japan, a recent study indicated that over 90% of adults aged 75 and older are affected by at least one chronic disease. Of these individuals, approximately 80% have multiple chronic conditions. Patterns of Co-occurrence of Chronic Disease Among Older Adults in Tokyo, Japan.

Complex diseases often require multifaceted management approaches due to their heterogeneous nature. Precision medicine provides comprehensive strategies that integrate genetic information with clinical data to manage these conditions more

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effectively. Precision medicine supports multi-modal treatment approaches, including personalized medication regimens, lifestyle interventions, and targeted therapies, which are crucial for managing complex diseases. The need for long-term monitoring of disease progression and treatment response drives the adoption of precision medicine tools that offer ongoing insights into patient health. Predictive models based on genetic and molecular data help anticipate disease progression and tailor interventions accordingly, improving patient outcomes and enhancing market demand. Cancer, a major chronic and complex disease, is a significant driver of the precision medicine market. Precision oncology focuses on customizing cancer treatment based on the genetic profile of tumors, which is increasingly relevant as cancer incidence continues to rise. The increasing number of cancer cases drives the demand for genomic profiling to identify specific genetic alterations and develop targeted therapies. Precision oncology enables the customization of chemotherapy regimens based on individual tumor characteristics, leading to more effective and less toxic treatment options. The rise in cancer cases fosters the development of personalized immunotherapies and targeted drugs, advancing the field of precision medicine.

The growing prevalence of chronic and complex diseases places a significant burden on healthcare systems, necessitating the development of more efficient and effective treatment strategies. Precision medicine addresses this need by offering solutions that optimize resource utilization and improve patient outcomes. By providing targeted treatments and reducing trial-and-error approaches, precision medicine can potentially lower overall healthcare costs associated with managing chronic diseases. Precision medicine helps allocate healthcare resources more effectively by focusing on personalized treatment plans that are more likely to yield positive results. The increasing demand for precision medicine solutions drives investments in research, technology, and infrastructure to support the growing needs of chronic disease management. The rising prevalence of chronic and complex diseases prompts both public and private sectors to invest in precision medicine research and development. These investments are crucial for advancing technologies, conducting clinical trials, and bringing new therapies to market. Increased investment in precision medicine research facilitates the development of innovative treatments and diagnostic tools tailored to chronic and complex diseases. Public-private partnerships and collaborations support the development and commercialization of precision medicine technologies, driving market expansion. Investment in cutting-edge technologies and clinical trials accelerates the introduction of new precision medicine solutions to address the growing burden of chronic diseases.

Growing Patient Demand for Personalized Healthcare

The growing patient demand for personalized healthcare is a significant driver of the Japan Precision Medicine Market, reflecting a shift towards individualized treatment approaches that enhance the quality and effectiveness of healthcare. Patients are becoming increasingly aware of the benefits of personalized healthcare, driven by advancements in medical technology and the growing availability of information. This awareness leads to higher expectations for tailored treatments that address their unique health needs. Enhanced access to information about genetic testing and personalized treatments empowers patients to seek out precision medicine solutions. This increased awareness fuels demand for services that offer individualized care. As patients become more informed about their health options, they are more likely to request personalized treatments that are specifically designed for their genetic profiles and medical conditions.

The desire for personalized healthcare stems from patients' needs for treatment plans that are tailored to their specific genetic, molecular, and lifestyle factors. Precision medicine provides the capability to customize treatments based on individual patient profiles, which is increasingly appealing to patients seeking more effective and less generic solutions. The demand for treatments that are tailored to individual genetic and molecular characteristics drives the development of new therapies and drug formulations that are more effective and have fewer side effects. Patients' preference for customized care promotes the growth of platforms and technologies that offer personalized treatment recommendations based on comprehensive data analysis. Personalized healthcare is associated with improved patient outcomes, including better disease management and higher treatment success rates. The effectiveness of personalized treatments in addressing specific patient needs reinforces the demand for precision medicine. Personalized treatments often result in more effective management of diseases, leading to better health outcomes and greater patient satisfaction. This effectiveness drives the adoption of precision medicine solutions. Tailored therapies minimize the risk of adverse effects and enhance patient safety, further encouraging patients to seek personalized healthcare options.

The rise of direct-to-consumer genetic testing services has empowered patients to take control of their health by gaining insights into their genetic predispositions and health risks. This trend contributes to the growing demand for personalized healthcare and

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precision medicine. Direct-to-consumer genetic tests make genetic information more accessible to the general population, increasing interest in personalized healthcare and precision medicine. The ability to obtain genetic information directly engages patients in their healthcare decisions, driving demand for follow-up services, such as personalized treatment plans and consultations. The integration of personalized medicine into routine healthcare practices is driven by patient demand for individualized care. As patients increasingly expect their healthcare providers to offer personalized treatment options, the adoption of precision medicine in clinical settings is accelerated. Healthcare providers are incorporating precision medicine approaches into their practice to meet patient expectations, leading to broader use of personalized diagnostics and therapies. The healthcare system is adapting to the growing demand for personalized care by developing infrastructure and protocols that support precision medicine, further driving market growth.

Key Market Challenges

High Costs and Economic Barriers

One of the most significant challenges impeding the growth of the Japan Precision Medicine Market is the high cost associated with precision medicine technologies and treatments. The development and implementation of personalized therapies, including advanced genomic sequencing and targeted treatments, require substantial investment in research and development. Additionally, the cost of genomic testing, bespoke treatments, and ongoing patient monitoring can be prohibitively expensive. The investment required for the development of new precision medicine technologies and therapies can be substantial, limiting the ability of smaller firms and research institutions to participate. Personalized treatments, particularly those involving advanced biotechnology and targeted drugs, often come with high price tags, which can be a barrier to widespread adoption. Limited insurance coverage for precision medicine services can restrict access to these treatments for patients, affecting market growth.

Data Privacy and Security Concerns

The management of sensitive genetic and health data poses significant challenges related to privacy and security. Precision medicine relies heavily on the collection and analysis of extensive personal health information, including genetic data, which raises concerns about data breaches and misuse.

Ensuring compliance with stringent data protection regulations, such as Japan's Act on the Protection of Personal Information (APPI), adds complexity to the handling and sharing of genetic data. The risk of data breaches and cyberattacks on health data repositories can undermine patient trust and hinder the adoption of precision medicine. Managing informed consent and ensuring that patients are fully aware of how their data will be used and shared is crucial but challenging in the context of advanced data analytics.

Limited Integration into Existing Healthcare Systems

Integrating precision medicine into existing healthcare systems and workflows is another significant challenge. The implementation of precision medicine requires changes to clinical practices, infrastructure, and provider training, which can be complex and resource-intensive.

Healthcare systems may need substantial modifications to incorporate genomic data and personalized treatment protocols into routine care, requiring investment in new technologies and systems. Healthcare providers need specialized training to understand and apply precision medicine concepts effectively, which can be a barrier to widespread implementation. Achieving seamless data integration and interoperability between different healthcare systems and precision medicine tools is challenging, impacting the efficiency and effectiveness of personalized care.

Key Market Trends

Integration of Artificial Intelligence and Machine Learning

The integration of artificial intelligence (AI) and machine learning (ML) into precision medicine is a significant driver of market growth. AI and ML technologies enhance the ability to analyze vast amounts of genomic, clinical, and healthcare data to identify patterns, predict disease outcomes, and personalize treatment plans. These technologies enable more accurate and efficient interpretation of genetic information, leading to the development of targeted therapies and improved patient outcomes. In Japan, where technological innovation is highly valued, the adoption of AI and ML in precision medicine is accelerating, fostering advancements in diagnostics and treatment.

AI algorithms are increasingly used to analyze complex genetic data and predict patient responses to various treatments. Machine learning models assist in identifying novel biomarkers and therapeutic targets. AI-driven tools improve the efficiency of drug

discovery and development processes.

Expansion of Genomic Sequencing Technologies

The advancement and expansion of genomic sequencing technologies are crucial for the growth of precision medicine.

High-throughput sequencing techniques, such as next-generation sequencing (NGS), enable comprehensive analysis of genetic variations and mutations that drive disease. These technologies are becoming more accessible and cost-effective, making it feasible to perform large-scale genomic studies and integrate genomic data into clinical practice. In Japan, the increased availability and application of genomic sequencing are enhancing the development of personalized therapies and contributing to the broader adoption of precision medicine.

The reduction in sequencing costs has led to wider use of genomic data in clinical settings. Advances in sequencing technologies support the identification of rare and complex genetic disorders. Genomic profiling is increasingly used to tailor cancer treatments and other personalized therapies.

Growth of Precision Oncology

Precision oncology is a rapidly growing field within precision medicine that focuses on customizing cancer treatment based on the genetic makeup of tumors. This trend is driven by the increasing recognition of the need for targeted cancer therapies that address specific genetic alterations and biomarkers associated with different cancer types. In Japan, the emphasis on precision oncology is leading to the development of more effective and personalized cancer treatments, improving patient outcomes and survival rates.

The use of genomic profiling to identify actionable mutations and guide targeted therapy selection. The rise of immunotherapy and personalized cancer vaccines tailored to individual patients' genetic profiles. Increased collaboration between researchers, pharmaceutical companies, and healthcare providers to advance precision oncology treatments.

Segmental Insights

Application Insights

Based on the category of Application, the therapeutics segment emerged as the dominant in the market for Japan Precision Medicine in 2024. Precision medicine in therapeutics focuses on developing and delivering treatments tailored to the individual genetic profiles, biomarkers, and disease characteristics of patients. By leveraging detailed genetic information and advanced diagnostics, precision therapeutics enables the customization of therapies to achieve better efficacy and minimize adverse effects. This personalized approach significantly enhances treatment outcomes, making it a preferred choice in the Japanese market.

The rapid advancements in genomic and molecular technologies have propelled the growth of the therapeutics segment. Techniques such as next-generation sequencing (NGS), genomics, and proteomics facilitate the identification of genetic mutations and molecular targets specific to diseases. This technological progress supports the development of targeted therapies and biologics, which are central to precision medicine. In Japan, where cutting-edge technology is widely adopted, these advancements drive the dominance of the therapeutics segment. Japan has a high prevalence of chronic and complex diseases, such as cancer, cardiovascular conditions, and neurodegenerative disorders. The therapeutics segment within precision medicine is particularly well-suited to address these conditions by offering targeted treatment options that are tailored to the genetic and molecular profiles of these diseases. The ability to provide specific and effective treatments for such conditions drives the growth of this segment in the Japanese market.

Significant investments in research and development within the therapeutics segment support the development of innovative treatments and personalized therapies. Pharmaceutical companies and biotech firms in Japan are investing heavily in R&D to discover and commercialize new therapeutics that align with precision medicine principles. This investment fosters innovation and expands the range of available therapies, reinforcing the dominance of the therapeutics segment. The Japanese government and regulatory bodies have implemented policies that support the development and adoption of precision therapeutics. Initiatives such as expedited approval processes for breakthrough therapies and incentives for precision medicine research contribute to the growth of the therapeutics segment. This regulatory support ensures a conducive environment for the development and introduction of targeted treatments. These factors collectively contribute to the growth of this segment.

Regional Insights

Kanto emerged as the dominant in the Japan Precision Medicine market in 2024, holding the largest market share in terms of

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value. The Kanto Region, encompassing major cities such as Tokyo and Yokohama, is a significant economic and industrial hub of Japan. This region boasts a high concentration of healthcare institutions, research facilities, and biotechnology firms, which are crucial for the development and implementation of precision medicine. The presence of numerous pharmaceutical companies and medical research institutions in Kanto accelerates innovation and adoption of precision medicine technologies.

The Kanto Region is home to some of Japan's leading hospitals and medical centers that are equipped with cutting-edge technology and offer comprehensive healthcare services. This advanced healthcare infrastructure supports the implementation of precision medicine by providing the necessary facilities for genetic testing, personalized treatment planning, and advanced diagnostics. The Kanto Region attracts significant investment from both public and private sectors into research and development within precision medicine. This influx of funding supports the growth of startups and established companies specializing in genomics, bioinformatics, and personalized healthcare solutions. The region's investment climate fosters an environment conducive to innovation and commercialization of precision medicine technologies.

The concentration of universities and research institutions in the Kanto Region contributes to a robust R&D ecosystem. Collaborations between academic institutions and industry players drive advancements in precision medicine, leading to the development of new therapies and diagnostic tools. The region's emphasis on research ensures a continuous pipeline of innovation in personalized healthcare. The Kanto Region benefits from favorable regulatory and policy environments that support the growth of precision medicine. The Japanese government and regional authorities often provide incentives and support for initiatives related to personalized healthcare, including regulatory approvals and funding for research projects. This supportive policy framework facilitates the introduction and integration of precision medicine solutions into the healthcare system.

Key Market Players

- F. Hoffmann-La Roche Ltd
- Siemens Healthineers AG
- Janssen Pharmaceuticals, Inc
- Illumina, Inc.
- Quest Diagnostics Incorporated
- Myriad Genetics, Inc.
- Medtronic Plc
- Abbott Laboratories Inc.
- QIAGEN NV
- GE HealthCare

Report Scope:

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

□ Japan Precision Medicine Market, By Application:

- o Diagnostics
- o Therapeutics

□ Japan Precision Medicine Market, By End User:

- o Home Care
- o Hospitals
- o Clinical Laboratories
- o Others

□ Japan Precision Medicine Market, By Region:

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

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- o Shikoku
- o Kyushu

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Japan Precision Medicine Market.

Available Customizations:

Japan Precision Medicine market report with the given market data, TechSci 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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