

**Japan CT Scanners Market Assessment, By Type [Stationary CT Scanners, Portable CT Scanners], By Technology [High-Slice CT Scanners, Medium-Slice CT Scanners, Low-Slice CT Scanners, Cone-Beam CT Scanners], By Application [Cardiovascular, Orthopedics, Neurology, Oncology, Others], By End-user [Hospitals, Diagnostic imaging Centers, Others], By Region, Opportunities and Forecast, FY2018-FY2032F**

Market Report | 2024-11-27 | 131 pages | Market Xcel - Markets and Data

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**Report description:**

Japan CT scanners market is projected to witness a CAGR of 6.12% during the forecast period FY2025-FY2032, growing from USD 401.00 million in FY2024 to USD 644.94 million in FY2032. The market is mainly growing under the influence of the growing elderly population, rising chronic disease burden, advancements in medical imaging technologies, growing emphasis on early cancer detection, and advanced healthcare services in Japan.

Japan CT scanners market is an important part of the overall medical imaging market, characterized by continuous growth and technological development. Japan is also considered one of the fastest-growing countries in the global market, with the highest per capita usage of CT scanners globally. Technological innovations, such as AI-powered imaging, photon-counting, and high-slice CT scanners, are driving the evolution of Japan CT scanners market. Moreover, the Pharmaceuticals and Medical Devices Agency (PMDA), the regulatory body under which the Japanese healthcare system operates, assures great safety and efficacy. Further growth of the elderly population coupled with elevating chronic disease incidences and more emphasis on health infrastructure by governments will increase the demand for advanced CT technology, therefore catering to further growth potential in the market. The key aspect of Japan's aging population affects the demand for advanced medical imaging technologies, such as CT scanners. Being one of the countries with the highest life expectancies, Japan continues to face a growing trend of elderly citizens needing frequent and extensive medical follow-ups. In return, this will increase the demand for fast and correct diagnostic modalities as conditions related to aging, such as cardiovascular diseases, cancers, and neurodegenerative disorders, set in. As a result, this demographic trend has been a strong driver of the market insofar as CT scanners are particularly well-positioned to enable

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appropriate medical care for elderly patients.

Technological advances act as a crucial driver in the market for CT scanners in Japan, as they enable the inclusion of advanced imaging capabilities in medical centers. Advancements like AI-based diagnosis, better image resolution, faster scanning speed, and lower levels of radiation have significantly increased the accuracy and efficiency of CT scans.

For instance, in March 2024, Canon Medical Systems Corporation released an analysis of their novel Photon Counting CT (PCCT) technology. It is considered one of the major advancements in the field of medical imaging, which has enabled higher resolution in imaging, thus increasing diagnosis accuracy with reduced radiation dosage. It is the essential constituent of the PCCT system that provides healthcare workers with significantly better diagnostic tools due to high spatial resolution, which is achieved by discriminating between different types of soft tissues. This achievement is expected to establish a new standard in medical diagnostics and further strengthen Japan's position as a leader in healthcare innovations.

#### Rising Aging Population in Japan and Target Diseases Impacting Japan's CT Scanners Market

Driving the computed tomography scanners market has been a force of growth in the population of elderly citizens in Japan. With Japan having one of the highest percentages in the world, the demand for advanced medical diagnostic systems keeps increasing steadily. According to the World Social Report 2023 report, published by the UN Department for Economic and Social Affairs, 29.1% of 125 million Japanese were 65 years old or over. The country has often posed one of the lowest birth rates in the world and is grappling with the challenges of supporting its aging population. By the year 2040, it is estimated to rise to 34.8%. These older adults are more prone to chronic diseases, including cancer, heart conditions, and neurological disorders, which require frequent diagnosis at high levels of detail. These are indeed the CT scanners that produce complex cross-sectional images, which are a critical need for diagnosing and monitoring such ailments. The Japanese government emphasizes improving health infrastructure while investing in higher-order medical technologies, hence driving the market's growth. Medical institutions and diagnostic centers are upgrading their facilities to cater to the increasing demand for diagnostic tools with greater precision. Such synergy of demographics and a healthcare system in flux creates ongoing growth in the CT scanner market in Japan, with both manufacturers and healthcare providers leveraging this trend.

#### Advancements in CT Scanners Nurture Market Growth

Technological change is the most significant factor affecting Japan's market for computed tomography scanners. Known for its innovative capabilities, Japan is now witnessing rapid developments in medical imaging technologies, particularly high-speed, low-radiation CT scanners. Such development is necessary to continue to fulfill the increasing demand for diagnostic services with high accuracy, given the aging population. Novel technologies, like AI-enhanced imaging and multi-energy computed tomography, enable faster and more accurate scanning while limiting the radiation dose and making them extremely useful for routine diagnostic applications and complex clinical situations. Moreover, the movement toward digital health is creating a pathway to the adoption of cloud-based systems and their integration with EHRs for easy records, boosting the market further. These innovations not only raise the level of care but further operational efficiency at healthcare facilities across Japan and, hence, strengthen the country's demand for state-of-the-art medical infrastructure.

For instance, in March 2023, Fujifilm Holdings Corporation (Fujifilm) and Chiba University launched a joint study to assess the clinical benefits of next-generation Photon Counting Computed Tomography (PCCT). This data gathered from tissues imaged with Fujifilm's PCCT will be collected and analyzed to discuss its perspectives concerning early bleeding and cancer diagnosis. This paper aims to present the capability of this new form of computed tomography to help improve diagnostic ability.

#### Technology Segment is Expected to Account for Major Market Share

Recently, multi-slice CT scanners have been very important in the Japanese CT scanners market. Multi-slice CT scanners hold the largest share of the market. The fact that even in Japan, advanced medical technologies, such as multi-slice systems have been widely adopted in most healthcare facilities across the country, speaks for itself. Multi-slice CTs boast better diagnostic ability, higher-resolution images, and quicker examination times, which may be associated with more accurate and efficient patient care. This growing preference for multi-slice CT scanners reflects the changing valuation of advanced imaging technology, while Japan's reimbursement structure has continued to apply constraints on spending in healthcare. Economic constraints have traditionally made many hospitals focus on cost rather than on cutting-edge technology. The rise in the installation of multi-slice CT scanners is a testament to the gradual shift toward investing in sophisticated imaging solutions to meet clinical needs and improve patient outcomes.

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For instance, in February 2022, Hakujuji Hospital installed a compact 80-row multi-slice CT system to improve diagnostic imaging capabilities. This addition builds on the success of deploying Canon's flagship 320-row area detector CT system in April 2021. The 160 mm image acquisition range and fast scanning time of this flagship model have proven to be very useful in many departments, including the emergency unit, and have received extremely positive feedback from physicians and radiologic technologists.

#### Future Market Scenario (FY2025-FY2032F)

Technological development and shifting population landscapes will both contribute to the growth of CT scanner markets in Japan. Due to chronic diseases, such as cancer and cardiovascular diseases, while the ratio of the elderly grows, the demand for the latest diagnosis equipment like CT scanners also increases. Certain steps in the evolution of this technology include spectral CT and AI-powered image analysis. These are bound to usher in better diagnosis rates with high precision and speed, hence driving further growth. The nature of competition in hospitals and diagnostic centers will probably ensure that the latest equipment is purchased to keep ahead with the edge for better service delivery. The interplay between the public and private health sectors will ensure that market dynamics are influenced, probably with private institutions playing a leading role in the adoption of technologies. While both the regulatory and economic environments will continue to play major roles in affecting market directions, the general trend waits further for the expansion of the CT scanner market in Japan with the advancement of technology and further widening of healthcare needs.

For instance, in November 2023, Mie University Hospital introduced the next-generation NAEOTOM Alpha CT scanner, with the most advanced photon-counting technology. As the only specialized hospital in the prefecture for acute care, Mie University Hospital will further strive to raise the standard of patient safety and the accuracy of diagnosis using this high-resolution, low-radiation, and spectral analysis-equipped CT system. The hospital has already started diagnosing using this new technology. Similarly, in April 2022, Fujitsu and Southern Tohoku General Hospital initiated a research study with Fujitsu Japan and FCOM CORPORATION in developing AI technology. This AI will enable the diagnosis of early-stage pancreatic cancer with the usage of non-contrast Computed Tomography, where there will be no need to use contrast agents during imaging.

#### Key Players Landscape and Outlook

With competition growing intensely, the pace of development in Japan's CT scanners market for leading players is racing at a very fast clip. Hitachi Medical Corporation and Canon Medical Systems Corporation, with its emphasis on high-resolution imaging and patient safety, are well-positioned to benefit from increasing demand driven by Japan's aging population. Moreover, a strong technological focus and a vast distribution network for product development initiatives to derive an edge. These leading companies would further leverage its position to capitalize on new technology and changing healthcare needs in Japan. For instance, in February 2024, Siemens Healthineers K.K., in Tokyo, introduced the SOMATOM Pro.Pulse, a novel dual-source computed tomography system for cardiac imaging. This brand-new model comes equipped with advanced image correction technology that allows for smooth and high-quality cardiac scans. The "myExam Companion" system with complete automation using AI increases efficiency in examination procedures. A 20% reduction in power consumption by the CT system contributes to cost reduction.

Similarly, in December 2023 Fujifilm Holdings Corporation, headquartered in Tokyo, introduced the "FCT iStream", its new 64-row, 128-slice multi-slice CT system. The new model provides AI-based image processing, IPV, and SynergyDrive for enhancement of image quality and optimized workflow. With superior diagnostic capabilities, this powerful system also integrates with Fujifilm's high-definition 3D image analysis system, SYNAPSE VINCENT.

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\*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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