Japan Digital X-ray Market Assessment, By Product [Stationary Digital Radiology System, Portable Digital Radiology System], By Technology [Direct Digital Radiology, Computed Digital Radiology], By Application [Cardiovascular Imaging, Chest Imaging, Dental Imaging, Digital Mammography, Others], By End-user [Hospitals, Diagnostic Imaging Centers, Others], By Region, Opportunities and Forecast, FY2018-FY2032F

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Report description:

Japan digital X-ray market is predicted to grow at a CAGR of 6.33% between FY2025 and FY2032, rising from USD 570.00 million in FY2024 to USD 931.37 million by FY2032. This growth is being driven by an expanding geriatric population, greater emphasis on early disease detection, a growing need for accurate diagnosis, and government initiatives to make diagnostic services easily accessible to people. Furthermore, advancements in the field of medical imaging contribute to market expansion.
The market for digital X-ray systems in Japan is growing at a significant rate with increased technological advancements and healthcare demands. Regulation involves the Ministry of Health, Labor and Welfare (MHLW), and the Pharmaceuticals and Medical Devices Agency (PMDA) managing approval and safety for imaging technologies, among others. Modern technology outlines the scope of the integration of AI-based and portable solutions that improve diagnosis speed and efficiency. Government policies to aid the digital transformation of healthcare facilities are also further propelling the growth of the market. The growing aged population, chronic diseases, and the need for efficient and accurate diagnosis techniques are factors of growth that influence the market. Thus, the scope for expansion of the digital X-ray market is quite high as it benefits from the increasing technological capabilities and favorable regulatory framework in Japan's health sector.
For instance, in June 2022, Konica Minolta, Inc. released DDRAtlas Ver. 1.0, a new resource for viewing normal cases in dynamic

digital radiography (DDR) on its membership website in Japan. The company's goal is to standardize diagnostics in this emerging field and establish a pathway for collaboration with healthcare professionals. DDRAtlas will systematically introduce in-vivo movement data and hence deepen the understanding of DDR to enhance the quality of medical care and contribute to the expansion of the digital X-ray market in Japan.

Expanding Geriatric Population to Support the Growth of Japan Digital X-ray Market

The rapidly aging population of Japan fuels the growing demand for more digital X-ray systems. With the increasing elderly population, there is a growing need for more enhanced diagnostic tools to address age-related health conditions efficiently. Digital X-ray systems meet that demand by offering several advantages over film-based X-rays. According to the Mitsui & Co. Global Strategic Studies Institute, there is an increased projection of the elderly Japanese population aged 65 and above. It is expected that between 2020 and 2030, the population of people aged 75 and more will increase from 18.6 million to 22.58 million. Digital X-ray enables faster acquisition and processing of images, which is particularly beneficial for older patients, who might have difficulties maintaining stillness for a longer period. The efficiency of digital X-ray systems therefore accelerates the diagnostic process allowing for faster treatment with less discomfort for the patient. These systems also produce sharper images with more detail, helping in the effective detection of conditions that need proper diagnosis in older adults, such as vascular and orthopedic conditions. Ultimately, the digital system ensures the most accurate diagnosis and better management of the diseases associated with aging.

Moreover, digital systems minimize radiation exposure which is especially important for those older adults who are more vulnerable to the harmful effects of radiation. This safety feature underlines the benefits of digital technology in imaging by providing better quality, efficiency, and safer imaging for the older population in Japan.

Technological Advancements in the Field of Medical Imaging

Japan leads the world in technological advancements, committed to provide precise and efficient diagnostic services to the community. This commitment is driving the growth of the digital X-ray market in Japan. Data automation and artificial intelligence (AI) integration solutions have transformed imaging devices in Japan. The progress is mainly a response to the increased demand for an efficient and accurate service in diagnostics. Moreover, the incorporation of AI enhanced the experiences of patients and reduced the workload on healthcare providers. As the aging population in Japan is expanding, there is a requirement for more advanced diagnostic imaging technologies that take into consideration the comfort of patients. Modern imaging systems in Japan started incorporating real-time data analytics, which enables faster disease detection and minimizes the need for invasive procedures. The country is moving forward with advancements in digital X-ray technology, by improving the quality of the image as well as reducing radiation exposure. In addition, new AI-powered image recognition systems are being introduced to help radiologists identify anomalies and improve diagnostic efficiency with less human error.

For instance, in August 2022, Canon Medical Systems Corporation launched a new wireless X-ray digital imaging device called CXDI-Pro. It is a compact, economical model using cesium iodide to minimize noise and offers low doses for imaging. The product is lightweight and survives any condition meeting IP55 standards in terms of dust and water resistance. When combined with the RADREX series, enhanced hardware and software streamline workflows, representing an efficient, high-throughput general X-ray imaging solution that showcases great technological leaps for Japan's digital X-ray market.

Portable Digital X-ray Segment Holds Major Market Share of the Digital X-ray Market

Companies operating in the Japan digital X-ray technology are focusing on the development of portable digital X-ray systems that allow on-site imaging in cases of emergencies, remote areas, or even patient homes. Digital X-ray devices are light, portable, and may be set up quickly and anywhere, hence suitable for critical care units. New product launches from key players in the region are one of the main reasons for the increased adoption of portable X-rays. These new products have upgraded imaging capabilities, longer battery life, and wireless connectivity, among other features that make it easy to incorporate them into clinical workflows. These portable X-rays offer several benefits to patients, like an all-around reduced wait time, faster diagnosis, and even the ability to perform imaging procedures in non-traditional settings without physically moving severely ill patients. Moreover, in comparison to conventional X-ray units, portable X-ray devices require fewer doses of radiation and will have higher-quality imaging, thus supporting better patient safety and improved diagnosis of diseases, which further fuels its growth.

For instance, in March 2022, Konica Minolta, Inc. launched the AeroDR TX m01, a wireless mobile X-ray system that is designed for use in ICUs, hospital wards, and operating rooms. Such a system supports dynamic digital radiography alongside old static

imaging, enabling the ability to deliver patient care onsite rather than having to move patients out of the unit for their examinations. It makes it easier to conduct the most intensive clinical examinations, improves diagnostic accuracy, and assists in managing patients' conditions better. Such introductions of mobile digital X-rays are responsible for the market expansion.

Future Market Scenario (FY2025-FY2032F)

The Japanese government is actively promoting healthcare digitalization and AI integration while growing digital X-ray systems. Encouraging innovation and investing in medical infrastructure paves the way for mobile and compact X-ray solutions. Improving efficiency and accessibility in diagnostics, Japan stands at the forefront of modern imaging technology, heavily dictating future market dynamics.

For instance, in March 2022, Canon Medical Systems Corporation introduced AI-driven image processing technology for its digital radiography control software. This technology decreases X-ray image noise by 50%. The new intelligent IR uses deep learning to produce images that have reduced grain compared to existing ones, thus enhancing the quality of diagnosis. This innovation not only makes the image sharper but is also expected to lead to lower X-ray doses in the future. This therefore shows the Canon Medical Systems Corporation's vision of the incorporation of AI in digital X-ray equipment to enhance patient care.

Similarly, in September 2022, Konica Minolta Japan Co., Ltd. unveiled its latest AeroDR swift X-ray. This device is known for its flat and light structure. This cassette-type DR system is suitable for bedside, operating rooms, and X-ray facilities offering high image quality at very low radiation doses. Such compact designs are said to be poised to spearhead future growth in Japan digital X-ray market representing the latest trend in medical imaging technology.

Key Players Landscape and Outlook

The key market leaders in the region are well-established, offering essential radiography solutions to hospitals, and ambulatory surgical centers. They are focusing significantly on developing economical devices to cater to smaller clinics, which have limited budgets. Companies are strengthening their market positions by introducing new products, partnering with academic institutions, and strengthening regional supply networks to fulfill diverse healthcare needs.

In April 2023, Fujifilm Holdings Corporation received a Red Dot Design Award for its newly designed Mobile X-ray fluoroscopy. Fujifilm Holdings Corporation has developed a light-weight C-arm unit using a flat panel sensor that integrates X-ray movies and still images, simplifying surgical processes without requiring any equipment change. This award enhances the brand's reputation, increases trust among healthcare professionals, and creates new business prospects.

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