

Japan Point-of-Care Diagnostics Market Assessment, By Product [Glucose Monitoring, Cardiometabolic Testing Products, Infectious Disease Testing Products, Coagulation Testing Products, Others], By Prescription [OTC Testing, Prescription-based Testing], By End-user [Hospitals, Diagnostic Centers, Research Laboratories, Home-care Settings, Others], By Region, Opportunities and Forecast, FY2018-FY2032F

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Report description:

Japan point-of-care diagnostics market is projected to grow at a CAGR of 4.50% from FY2025 to FY2032, increasing from USD 2.61 billion in FY2024 to USD 3.71 billion by FY2032. The market for point-of-care diagnostics in Japan is experiencing growth during the forecast period due to the rising elderly population in Japan, technical innovations in diagnostics, increased investments, growing awareness about early prevention and benefits of point-of-care testing, and government-supportive policies.

The country's advanced healthcare infrastructure, along with high expenditure on healthcare, has contributed much to the improvement in Japan's point-of-care diagnostics market. Moreover, its aging population requires efficient and effective medical solutions; therefore, the demand for the market increases. Japan is a trendsetter in technological innovation and adopts the most advanced technologies used in health care; therefore, a favorable environment is provided for the growth of point-of-care diagnostics. Strong research and development focus leads to the production of superior, user-friendly diagnostic tools that improve patient care and efficient clinical workflows. Japan serves as a global point-of-care diagnostics leader in meeting its own needs as well as international health needs in this dynamic landscape.

Furthermore, companies also diversify their portfolio of point-of-care diagnostics by launching new products in the market. This leads to innovation, availability, and enhanced accessibility of products. Therefore, it can address the increasing patient needs and advance the diagnostic capabilities that eventually fuel growth. For instance, in May 2023, Canon Medical Systems Corporation introduced Rapiim SARS-CoV-2-H antigen kit for quantitative SARS coronavirus testing in Japan. This product was the first insurance-covered, point-of-care testing (POCT) solution in Japan. Such advancement offers better diagnostic efficiency to

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meet the patient's time-sensitive demands and provides significant market growth through point-of-care diagnostics in Japan.

Growing Geriatric Population Drives Point-of-Care Diagnostics Market

On the backdrop of rising geriatric population in Japan, there has been rising incidences of chronic diseases, further driving the demand for point-of-care testing (POCT) devices. POCT helps in effective counseling of the patients, helps avoid unnecessary escalation of the treatment, and provide immediate results in ambulatory settings without hospitalization. Japan's Ministry of Internal Affairs and Communications estimated that the aged population currently constitutes approximately 29.3% of the population, and, based on projections from the National Institute of Population and Social Security Research, this figure may reach 34.8% in 2040, which presents challenges since this group will increasingly bear the healthcare and welfare burdens.

Consequently, there would be an increased demand for diagnostic and healthcare solutions that are easily available and easier to use. Therefore, the market for point-of-care diagnostics in Japan will grow with high momentum during the forecast period.

The Japanese government invests in digital health technologies to improve care delivery to elderly populations. The solutions enable remote monitoring and consultancy, which are fundamentally important for care among older people. Moreover, the Ministry of Health, Labour and Welfare (MHLW) is looking to promote healthcare conferences to provide a sense of awareness concerning needs, as well as drive growth on the side of point-of-care diagnostics.

Increased Fundings Supports the Growth of the Point-of-Care Diagnostics Market in Japan

Increased funding is one of the growth drivers for Japan's point-of-care diagnostics market. Investments in research by the government, private sector, and venture capital result in product innovation and accelerated regulatory approvals. Increased funding enables the development of diagnostics techniques, like mobile health applications and rapid testing kits, facilitated by the infusion of capital while improving access and accuracy. Funding also supports partnerships between the hospital and startups to help integrate point-of-care solutions within the clinical setting. As the demand for healthcare shifts, better finances will help ensure that Japan remains a leader in innovation diagnostics with better patient outcomes and growth in the market. For instance, in March 2023, Immunosens Co., Ltd. (Immunosense) closed the Series B-2 financing round by raising USD 5.5 million (500 million yen) through third-party allotments and loans. The Osaka University startup aims to improve point-of-care testing using a new method of measuring immunity called the Gold-Linked Electrochemical Immunoassay (GLEIA) method. The thrust is on cardiovascular health and product development.

Growing Awareness Regarding Benefits Point-of-Care Diagnostics Promotes Market Growth

With heightened awareness of point-of-care (POC) testing, which can provide faster results, enhance patient outcomes, and drive care delivery, adoption of these solutions is increasingly being driven from the healthcare provider and patient side. In addition, advances in diagnostic testing of infectious diseases, chronic conditions, and cardiovascular health all correlate with this trend. With new technologies and methods, constant development based on increasing demand will ensure diagnosis and treatment may occur earlier. Now this emphasis on efficiency and accuracy within testing results not only improves the overall healthcare experience but places POC diagnostics as an important element within Japan's changing healthcare landscape. For instance, in August 2024, Metaboscreen Co., Ltd., launched the 24-hour Sexually transmitted infections (STI) self-testing service in Yoshiwara, Japan. This center conducts ten types of STI tests without an appointment and reports results on the same day with high efficiency and lower turn-around time. Therefore, the introduction of such new testing centers will raise awareness about the benefits of point-of-care diagnostics testing, which provides immediate results.

Glucose Monitoring Products Dominating the Point-of-Care Diagnostics Market

The high incidence of diabetes in Japan is one of the major driving factors behind the prominence of glucose monitoring in the point-of-care (POC) diagnostics market. Japan is ranked as the ninth largest nation in terms of diabetes prevalence. Patients with type 2 diabetes are at high risk for complications, including cardiovascular conditions and muscle degeneration or sarcopenia. Thus, prevention of type-2 diabetes becomes essential. This diabetic population requires regular monitoring of the level of glucose to achieve effective management of the disease. Point-of-Care (POC) glucose testing provides immediate results both to patients and healthcare professionals allowing both patients and healthcare professionals to make timely, informed decisions regarding necessary treatment modifications. For instance, in May 2023, DexCom, Inc. featured the accuracy, reliability, and user-friendly characteristics of its Dexcom G6 CGM system for the diagnosis of both type 1 and type 2 diabetes, at the 66th Japan Diabetes Society Annual Meeting. The product provides continuous monitoring of glucose levels using a wearable sensor while transmitting the data to smartphones or other smart devices. These customizable alerts prevent erratic fluctuations of glucose levels, and the

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data-sharing feature allows up to 10 people to monitor the readings in real-time.

Future Market Scenario (FY2025 -FY2032F)

-□The Japan point-of-care diagnostics market is expected to experience significant growth in coming years with an increase in the prevalence of infectious diseases, greater investment in R&D, and increased awareness about point-of-care testing, as well as technological advancement in point-of-care tests.

-□Japan is revolutionizing health care through diagnostic technologies such as point-of-care testing which is changing the shape of patient care. For example, in March 2024, Lumira Diagnostics Japan Co., Ltd. launched the Lumira NT-proBNP Test Strip which has been engineered to become the first POCT solution for the detection of NT-proBNP using a small quantity of blood samples. The compact, portable Lumira device accommodates a range of healthcare settings: outpatient and home care.

-□Moreover, multipurpose diagnostic devices will comprise most of the growth in the market in the next few years. For instance, May 2023, Sakae Co., Ltd. released the Eigear Pro, a pack-type clinical chemistry analyzer that can measure c-reactive protein, albumin-to-creatinine ratio, and hemoglobin A1c within one device. It is compact and portable, delivering results for all three tests within approximately five minutes.

Key Players Landscape and Outlook

Japan's point-of-care diagnostics market is highly competitive, and key players focus on strategic partnerships for innovation, new product launches, and regulatory approvals to stay ahead in the marketplace. Companies will look to introduce the latest diagnostics, invest in new technologies, and expand their offerings to remain leaders in the market.

In March 2023, F. Hoffmann-La Roche Ltd. (Roche Diabetes Care) and Astellas Pharma Inc. (Astellas) co-developed and commercialized the blood glucose monitoring system, Accu-Chek Guide Me, which features high accuracy as a combination product and BlueStar. The companies Astellas and Welldoc, Inc. have agreed to co-develop BlueStar in Japan, expecting it to be approved for marketing to empower patients with diabetes to self-manage the condition with the aid of AI-powered coaching and data tracking. This combined product helps self-diabetic management in Japan by capturing glucose data by Roche Diabetes Care Accu-Chek Guide Me and tracking other activities using the BlueStar(app).

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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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