Japan Proteomics Market Assessment, By Products and Services [Instruments, Reagents and Consumables, Services], By Technology [Spectrometry, Electrophoresis, Chromatography, Microarray Instruments, X-Ray Crystallography, Next-Generation Sequencing, Protein Fractionation Systems, Surface Plasma Resonance Systems, Others], By Application [Drug Discovery and Development, Disease Diagnosis, Others], By End-user [Academic and Research Institutes, Clinical Laboratories and Hospitals, Pharmaceutical and Biotechnology Companies, Others], By Region, Opportunities and Forecast, FY2018-FY2032F

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Report description:

Japan proteomics market is projected to witness a CAGR of 10.12% during the forecast period FY2025-FY2032, growing from USD 1.49 billion in FY2024 to USD 3.21 billion in FY2032. The rapid expansion of the geriatric population, increasing investments in the healthcare sector, and rising requirements for advanced diagnostic technologies are some of the factors propelling the growth of the proteomics market in Japan.

Proteomics is witnessing significant growth in the country due to rapid advancements in genomics and biotechnology and rising drug discovery and development requirements. Over the past few decades, proteomics has been instrumental in supporting the development of novel diagnostic tools as well as the identification of biomarkers. With Japan's increasing focus on personalized medicines, investments in proteomics are rapidly increasing to ensure the aging population has access to advanced medical care,

including rapid diagnostic equipment and novel therapeutic solutions.

The increasing support from the Japanese government to boost life science research activities by streamlining regulatory pathways and funding research initiatives encourages pharmaceutical and biotech companies to enhance their proteomics capabilities, further supporting the market's expansion.

The increasing launch of novel products and technologies in the country also supports the market's expansion. In January 2024, Quantum-Si Incorporated, a leading protein sequencing company, announced that their protein sequencing instrument, Platinum, is going to be available in Japan. The instrument is being distributed by TOMY Digital Biology Co., whose cutting-edge solutions align with Quantum's goals of scientific innovation, ensuring that the researchers and healthcare professionals in Japan have access to high-quality equipment for successfully completing next-generation protein sequencing.

Increasing Investments Towards the Healthcare Sector Support Market Expansion

The rapid growth of the aging population is one of the major factors for which Japan is increasingly investing in enhancing its healthcare sector. The demographic shift is propelling the requirement for healthcare services such as geriatric care, chronic disease management, and rapid disease detection. Additionally, the government is making more investments to support the growth of the country's healthcare startups. In June 2024, a Japanese health ministry panel shared their plans for strategic investments to make the country's healthcare startups more competitive. The proposal presented by the panel identified the characteristics and structure of each segment of the healthcare sector and outlined how the country plans to make strategic investments that support the success of healthcare startups. Such efforts are expected to enhance the country's position in the biotechnology and precision medicine sectors and provide lucrative growth opportunities for the market.

Expansion of the Aging Population Boosts Market's Demand

The rising requirement for proteomics can be attributed to the rising research and development activities and increasing investments toward developing personalized and age-related healthcare solutions. As the elderly population grows, the prevalence of degenerative and chronic conditions such as cardiovascular diseases, arthritis, Alzheimer's disease, and cancer is rising, bolstering the demand for advanced therapeutic and diagnostic solutions, thus positively influencing the market's expansion. According to estimates from the World Economic Forum, as of September 2023, more than one in ten people in Japan is eighty or older. Proteomics allows the identification of protein biomarkers associated with chronic diseases and aging and facilitates early diagnosis and deployment of targeted treatments. Additionally, the older population has a diverse set of healthcare requirements that often need personalized approaches; proteomics aids healthcare professionals in understanding disease progression and analyzing drug profiles.

Increasing Efforts of Leading Pharmaceutical Companies Boost Market Expansion

Pharmaceutical companies are playing a crucial role in boosting the expansion of the proteomics market in Japan by increasingly focusing on collaborations with research and academic institutions and investing in research and development activities. For instance, in November 2023, Eli Lilly and Company and PRISM BioLab Co Ltd signed a collaboration and licensing agreement for discovering and developing small molecule inhibitors of protein-protein interactions. Under the agreement, Eli Lilly pledged approximately USD 660 million in commercial, preclinical, and clinical development milestones. In return, Eli Lilly received access to PRISM's PepMetics platform that synthesizes small molecule drug candidates that behave like peptides. PepMetics compounds mimic ?-turns and ?-helices, the secondary structures of proteins, allowing the modulation of protein-protein interaction and design of targets. Such collaborations are expected to alter the drug discovery and development paradigm and turn previously undruggable protein-protein interactions into targets that small molecules can easily drug.

Drug Discovery and Development Witness Growth

The growth of the drug discovery and development segment can be attributed to the rising requirement for improving the understanding of disease mechanisms, developing novel treatment solutions to combat the growing threat of different diseases, and identifying therapeutic targets. Proteomics plays a crucial role in such activities by analyzing post-translational modifications and protein-protein interactions.

Various pharmaceutical companies and educational institutes in Japan are working on developing partnerships to strengthen their drug discovery capabilities. In December 2024, Tohoku University and Takeda Pharmaceutical Company Limited entered into a strategic alliance to build and leverage a clinical trial network. Project Souten aims to improve patient access to medical care as well as clinical development processes. The partnership also aims to foster the development of novel drugs and solutions and

boost their practical applications.

Future Market Scenario (FY2025-FY2032F)

- According to the Japan proteomics market analysis, the market is expected to grow significantly over the forecast period due to rising government efforts and support, growing requirements for personalized medicines, and technological advancements. Innovations in data analysis tools, mass spectrometry, and protein sequencing are also expected to accelerate the market's expansion.
- International and domestic strategic collaborations are expected to play a pivotal role in advancing proteomics-related research and development activities in the country.
- The growth of the aging population in the country is also expected to drive the market's growth over the forecast period. According to Carnegie Endowment for International Peace estimates, over 35% of the country's population will be older than sixty-five by 2040. As the population ages, there is a higher prevalence of age-related diseases such as cancer, Alzheimer's, and cardiovascular diseases, proteomics research aids in understanding these diseases at a molecular level, resulting in the development of personalized medicines and targeted therapies.

Key Players Landscape and Outlook

Various companies are working on raising funds to distribute and launch their products across the globe, including Japan, providing lucrative growth opportunities for the market. For instance, in October 2023, Pixelgen Technologies AB raised USD 7.3 million in a Series A round that Navigare Ventures AB and Industrifonden backed. The company is using the funding to support its commercial expansion and has launched plans to distribute its products in Australia and Japan with the help of partnerships with Australian Biosearch Ply Ltd. and BioStream Co., respectively. Such alliances are expected to bolster the availability of different proteomic solutions in the country, positively influencing the market's expansion.

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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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