

Japan Foot and Ankle Devices Market Assessment, By Product [Bracing and Support Devices, Joint Implant, Orthopedic Fixation, Soft Tissue Orthopedic Devices, Prosthetics], By Procedure [Osteotomy, Fracture Repair, Fusion Procedures, Others], By Application [Osteoarthritis, Neurological Disorders, Trauma, Osteoporosis, Hammertoe, Rheumatoid Arthritis, Others], By Region, Opportunities and Forecast, FY2018-FY2032F

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Report description:

Japan foot and ankle devices market is projected to witness a CAGR of 8.55% during the forecast period FY2025-FY2032, growing from USD 224.37 million in FY2024 to USD 432.53 million in FY2032. Japan foot and ankle devices market is expected to keep growing robustly during the forecast period owing to an increasing geriatric population, increasing demand for minimally invasive surgery, and increasing advancements in healthcare technology.

The foot and ankle devices market in Japan is largely impacted by high prevalence rates of conditions that include diabetes-related complications, osteoporosis, and sports injuries. Diabetic peripheral neuropathies affect a considerable population, and the complications are likely to become severe and are related to severe foot issues, including having a notable rate of amputations. In addition, foot and ankle pain, which has been frequently reported among specific occupational groups, such as nurses, is one of the broader musculoskeletal stress issues in Japan. With an aging population, these conditions drive demand for advanced orthopedic solutions, especially in urbanized and healthcare-focused regions. In Japan, knee osteoarthritis affects 8 million symptomatic individuals and 25 million with radiographic evidence, creating significant economic and healthcare challenges. With life expectancy projected to reach 90 years for women and 84 years for men by 2050, the aging population exacerbates the impact on quality of life and healthcare systems.

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Increasing Prevalence of Foot and Ankle Disorder Boosts Market Growth

The increasing prevalence of foot and ankle disorders is one of the most significant growth drivers in the Japan foot and ankle devices market. Common conditions, such as osteoarthritis, diabetic foot complications, fractures, and ligament injuries, are on the rise due to the increasing prevalence of chronic diseases and an aging population. Demographic changes, along with increasing cases of traumatic incidents, and obesity support the growth of the market. These disorders require specialized medical treatments in the form of implants, external fixation devices, and orthotics and, thus, are developing into an increasing market for advanced treatment solutions. Moreover, patient awareness and availability of orthopedic care are on the rise in urban and semi-urban regions, leading to sustained growth in the market.

For instance, in December 2024, Fujitsu Limited and iSurgery Co. Ltd. launched a bone health promotion project collaborating with Jikei University School of Medicine to improve early osteoporosis detection in Japan. This initiative uses iSurgery's AI-driven bone indicator software to analyze radiographs for bone health, offering a non-invasive method to assess osteoporosis risk.

Rising Awareness and Technological Advancements Drive Market Growth

Growing awareness about foot and ankle health and the pace of technological advancements are major growth drivers for Japan's foot and ankle devices market. Recognition of early diagnosis and treatment methods has driven higher adoption of orthopedic devices, especially in managing osteoarthritis, diabetic foot complications, and sports-related injuries. New technology with applications including 3D-printed implants, biodegradable material, and less invasive surgical techniques help treat patients better. These advancements, supported by growing accessibility to healthcare and initiatives for enhancing podiatric care, support the adoption of advanced devices for feet and ankles in urban and semi-urban regions of Japan.

For instance, in May 2024, OrthAlign, Inc. launched its Lantern handheld technology for knee arthroplasty in Japan, expanding its offerings to total, partial, and revision knee arthroplasty. Lantern provides personalized alignment with single-use, platform-agnostic technology for seamless integration into any operating room. The launch aims to strengthen OrthAlign's market position in Japan and drive growth for its partners.

Soft Tissue Orthopedic Devices Segment to Dominate the Foot and Ankle Devices Market

The soft tissue orthopedic devices segment is expected to capture the maximum market share in the foot and ankle devices market, led by an increasing incidence of sports-related injuries, growth in the prevalence of musculoskeletal disorders, and developments in minimally invasive surgical technologies. Advancements in invasive surgical techniques and the rising adoption of soft tissue repair solutions like tendon and ligament repair products result in improved patient outcomes and shorter recovery times, enhancing the dominance of this product segment. Also, the increasing demand for innovative biologics and synthetic materials to improve repair durability is supposed to boost market growth. For instance, in January 2023, Medacta International SA launched the NextAR Augmented Reality Surgical Platform in Japan. Medacta has successfully performed the first surgeries using its NextAR Augmented Reality Surgical Platform in Japan, following approval from the Ministry of Health, Labour, and Welfare. NextAR offers personalized augmented reality solutions for joint replacement and spine procedures, using real-time patient data to enhance surgical workflows. The platform is designed to improve surgical precision, with applications in knee, shoulder, and spine surgeries.

Osteoporosis Segment is Expected to Dominate the Japan Foot and Ankle Devices Market

The osteoporosis segment dominates the application category in the foot and ankle devices market in Japan because the country has a growing old population, coupled with an increased prevalence of bone diseases. Millions of individuals worldwide suffer from osteoporosis, especially postmenopausal women and geriatric males, which in turn results in an increase in demand for foot and ankle devices to treat fractures, deformities, and loss of bone density. This trend is compounded by the expected increase in the elderly population in Japan, which further increases the demand for sophisticated orthopedic solutions. Advances in implant materials, such as lightweight and biodegradable products, and better fixation techniques are also driving up the use of devices in this segment. The market leaders are now focusing on product development to cater to osteoporosis-related complications and solidify this segment at the top. For instance, in November 2024, Ortho Development Corporation, in partnership with Materialise NV, introduced BKS Total PSI, a patient-specific solution for total knee arthroplasty. This technology combines virtual visualization, pre-operative planning, and 3D-printed guides to enhance surgical precision, improve workflows, and reduce costs in surgical centers and hospitals. Ortho Development focuses on orthopedic solutions in the United States and Japan, with backing from Japan Medical Dynamic Marketing Inc.

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Future Market Scenario (FY2025-FY2032F)

- Japan is experiencing rapid demographic aging. As a result, orthopedic conditions such as osteoarthritis, fractures, and osteoporosis will highly increase, and thereby, a demand for foot and ankle devices will arise.
- Innovations, such as 3D-printed implants, minimally invasive surgical techniques, and advanced fixation devices, will drive growth in the market due to improved efficacy and outcomes.
- Rise in awareness about foot and ankle disorders and need for early interventions shall drive adoption of advanced treatment.
- Increasing incidences of diabetes and its complications like diabetic foot ulcers will sustain the demand for devices designed particularly to treat these conditions.
- Advances in Japan's healthcare facility along with a series of policy changes towards advanced technology medical care shall help accelerate market growth.
- Market leaders shall launch innovative products and develop effective partnerships to have a maximum hold on the Japanese market.
- A higher prevalence of sports injuries along with musculoskeletal conditions will also push the Japanese market toward upward growth.

Key Players Landscape and Outlook

Japan foot and ankle devices market is being catered to by major key players that have a global presence. Recent market developments include product launches, new treatment center setups, and strategic activities like mergers and acquisitions, driving growth and increasing competition.

For instance, in March 2024, Intellijoint Surgical Inc. received regulatory approval for its Intellijoint KNEE in Japan, marking its second orthopedic product in the country. Intellijoint KNEE provides real-time measurements for surgeons during total knee replacement and is compatible with all implant systems, enhancing its integration into existing surgical workflows and expanding its presence in the computer-assisted surgical navigation market. Following the success of Intellijoint HIP in Japan, the company continues to enhance surgical precision and patient outcomes globally.

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15.3.9. Orthofix Medical Inc

*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

16. Strategic Recommendations

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