Japan Proton Therapy Market Assessment, By Product Type [Systems, Services], By Indications [Head and Neck Cancer, Central Nervous System Cancer, Prostate Cancer, Breast Cancer, Lung Cancer, Pediatric Cancer, Gastrointestinal Cancer, Others], By Setup Type [Single-Room Systems, Multi-Room Systems], By End-user [Hospitals, Proton Therapy Centers, Cancer Centers or Institutes], By Region, Opportunities and Forecast, FY2018-FY2032F

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Report description:

Japan proton therapy market is predicted to grow at a CAGR of 8.20% between FY2025 to FY2032, rising from USD 81.16 million in FY2024 to USD 152.47 million by FY2032. The proton therapy market in Japan is influenced by several factors, including rising expenditure on health, a growing trend toward advanced treatment among physicians, and a growing incidence of cancer. Japan is among the world's leading countries in the number of proton therapy facilities, with increased state-of-the-art radiotherapy technology and continued technological advancements further driving the market. Increased awareness among healthcare professionals and the population as a whole of advanced cancer treatment is also a key driver for this market.
The cancer incidence in Japan has been rising steadily, which has resulted in an ever-growing need for advanced treatment. The National Cancer Center and National Research and Development Agency of Japan projected that, in 2024, there were 979,300 cancer incidences in the country, reflecting a cause for concern. To address this challenge, Japan has been at the forefront of medical technology, having discovered new treatments like proton therapy. This highly targeted intervention is designed to treat tumors while sparing surrounding healthy tissues, thus making it a preferred choice. With many specialized centers already having this technology, the increasing burden of cancer is further fueling the demand for proton therapy, which provides better treatment outcomes and is a demonstration of Japan's leadership in sophisticated cancer treatment.

Japan has been striving to make cutting-edge cancer care more available to the public. Japan's universal public health insurance ensures that a comprehensive range of medical care is made accessible, keeping patients' out-of-pocket expenses low. In June 2024, Japan's Ministry of Health, Labour, and Welfare made headlines by announcing that early lung cancer proton therapy would be covered by national health insurance. This groundbreaking move encourages a curative option for many. It enables patients to take advantage of advanced proton therapy while cementing Japan's dedication to innovation and equity in the fight against cancer.

Advancements in Cancer Treatment Impacting Japan Proton Therapy Market

Japan is at the forefront of creating novel cancer treatments by utilizing cutting-edge technologies including immunotherapy, AI-powered diagnostics, and personalized medicine. Proton therapy is one of the remarkable advancements, giving precise radiation with less harm to the surrounding healthy tissues, and best suited for pediatric and persistent cancers. Japan has made substantial investments in the expansion of several proton therapy centers, owing to an increase in cancer incidence and government support. Some of the innovations in cancer treatment, such as flash therapy and miniaturized proton systems, are reducing its cost and increasing its efficiency. Several companies have collaborated with universities to innovate and improve cancer care innovations. Sumitomo Heavy Industries Ltd. and Fujita Health University collaborated and initiated research for a new BNCT and an extremely powerful new cancer drug in December 2024. These developments can cure presently incurable cancers such as pancreatic cancer. This technology is changing the way treatments are done in cancer and presenting huge market expansion opportunities for proton treatment in Japan, making it a pioneer for cancer treatment breakthroughs. This partnership creates new opportunities for growth and innovation in the sector. These advancements, coupled with the growing need for minimally invasive treatments, are fueling the expansion of Japan's proton therapy market, drawing domestic and foreign investments. Through additional research, Japan will be able to position itself at the forefront of future cancer therapies and take its rightful position in oncology treatment innovations globally.

Higher Adoption Supports Market Expansion

Japan is accelerating the adoption of advanced therapies owing to increased investments in its healthcare facilities. This new paradigm presents promising opportunities for proton therapy in Japan, with advanced treatments increasingly used in the clinic. With rising adoption in government and private cancer institutes, proton therapy is gaining traction in the Japanese cancer treatment industry. Chubu International Medical Center launched its "Proton Beam Therapy Department" in March 2024 as a pioneer in cancer treatment. The center, being Japan's first to use Varian's newest "ProBeam" technology, will subsequently introduce Boron Neutron Capture Therapy (BNCT). The technology is backing the growing demand for proton therapy in Japan, propelling the market's growth and calling for continuous innovations to meet the evolving requirements of medical professionals. Studies are ongoing to improve its use, pushing its application into paediatrics, head and neck, and other recurrent cancers. While the need for targeted and minimally invasive treatments increases, Japan is becoming the world leader in proton therapy technology, which is defining the future of cancer care.

Hospitals are the Major End-users of the Proton Therapy in Japan

Hospitals are the most crucial players in the Japanese proton therapy market, and they are the major end-users of this novel cancer treatment. Large hospitals have been the forerunners in adopting this technology in their cancer departments because proton therapy centers cost a lot of money to establish. They also facilitate research and innovation. For instance, in January 2025, the Tokyo Metropolitan Hospital Organization invested USD 121 million (5 billion yen) in establishing a proton beam therapy center at Komagome Hospital in Tokyo, Japan. The center will begin treating patients in fiscal 2030. This indicates that Japanese hospitals are significant consumers of this innovative treatment. The rising incidence of cancer, along with government encouragement of new treatment, has also strengthened their position. Moreover, partnering with research centers facilitates the development of new technologies and makes treatment easily available to patients. With more emphasis on precision medicine, hospitals continue to expand their proton therapy services, making them significant contributors to market growth and development.

Future Market Scenario (FY2025 -FY2032F)

Japan's proton therapy market will grow strongly with enhanced precision oncology, rising cancer cases, and strong government backing. Rising investments in new radiation technology and expanding healthcare infrastructure further augment growth. The high cost of treatment and restricted reimbursement, however, remains a challenge. Nevertheless, the market is projected to

thrive with enhanced awareness and accessibility, further solidifying Japan in advanced cancer therapy.
In June 2023, B dot Medical Inc. formed a strategic partnership with RaySearch Laboratories AB to advance proton therapy by integrating RayStation and RayCare with B dot Medical's ultra-compact proton therapy system. The collaboration intends to make proton therapy more accessible to healthcare professionals to treat more patients. This partnership fosters market expansion and encourages widespread adoption of proton therapy by maximizing system capabilities and providing advanced solutions. Furthermore, it contributes to advancing radiation oncology and achieving the mission of 'proton for everyone'.
Key Players Landscape and Outlook
Japan's proton therapy market players follow various strategies to strengthen their market reach. They focus on getting regulatory approvals to facilitate ease of product entry and compliance. Strategic partnerships with medical institutions and technology companies accelerate innovation and access. Increasing treatment centers, maximizing patient financing options, and research expenditures further deepen their hold. All these strategies together encourage greater adoption and long-term growth in Japan's proton therapy market.
In November 2023, B dot Medical Inc. got approval from the Ministry of Health, Labour and Welfare of Japan for their ultra-compact proton therapy system Phemto, as per the Pharmaceuticals and Medical Devices Act. Phemto is an innovative device, which has a vision of being as tiny as X-ray (LINAC) therapy systems. This clearance reinforces B dot Medical's market position, reflecting its innovation and dedication to making advanced proton therapy easily available to healthcare facilities. Their achievement is evidence of their dedication to revolutionizing radiation oncology.

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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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