

Japan Portable Ultrasound Devices Market Assessment, By Type [Handheld, Compact, Cart/Trolley], By Technology [2D Ultrasound, 3D and 4D Ultrasound, Doppler Ultrasound, High-Intensity Focused Ultrasound], By Application [Gynecology, Cardiovascular, Urology, Gastric, Musculoskeletal, Others], By End-user [Hospitals and Specialty Clinics, Ambulatory Surgical Centers, Others], By Region, Opportunities and Forecast, FY2019-FY2033F

Market Report | 2025-04-22 | 127 pages | Market Xcel - Markets and Data

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Report description:

Japan portable ultrasound devices market is projected to witness a CAGR of 7.25% during the forecast period FY2026-FY2033, growing from USD 180.78 million in FY2025 to USD 316.47 million in FY2033. The market's growth is supported by the rising cases of cardiovascular diseases and cancer, among other diseases that require point-of-care diagnostic solutions for effective disease management and early detection. As per the estimates of the National Cancer Center of Japan, 1,019,000 new cases of cancer and 380,400 cancer related deaths were reported in Japan in 2022. Thus, propelling the requirement for accessible and accurate diagnostic tools like portable ultrasound devices.

Moreover, the growing preference for minimally invasive procedures is increasing the demand for portable ultrasound systems in emergency care and bedside diagnostics in the country. These devices offer a broad range of advantages including, affordability, instant diagnosis, and improved patient throughput compared to traditional diagnostic systems. Additionally, government initiatives and investments in healthcare infrastructure further support market growth by promoting the adoption of ultrasound devices. Increasing awareness about the various advantages associated with portable ultrasound devices has also contributed to their widespread demand in Japan. Innovations such as artificial intelligence (AI), enhanced imaging systems and wireless handheld devices are aiding in improving diagnostic accuracy, mobility, and ease of use.

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Increasing Number of Medical Device Conventions Supports Market Expansion

Rising number of medical device conventions in Japan are driving the growth of the market as they foster innovation, support exchange of information, and adoption of novel technologies. They also serve as platforms for various medical device manufacturers to showcase their latest products and technologies, while allowing medical professionals to gain awareness about the newer technologies in point-of-care diagnostics and the various advantages associated with their usage. For instance, ABLIC Inc. exhibited at "Medtec Japan" that was held at Tokyo Big Sight (Ariake, Koto-ku, Tokyo) from April 9 to April 11, 2025. The company's exhibit featured integrated circuits for ultrasound imaging equipment and introduced their new viewphii series that allows the realization of a wireless ultrasound probe with three units and two types of Langelier Saturation Index (LSI). Additionally, these conventions also highlight the versatility of such devices across various medical fields such as cardiology, obstetrics, musculoskeletal imaging, and emergency care, among others and the increased exposure encourages medical professionals to integrate portable ultrasound systems into their practices.

Rising Cases of Cardiovascular Diseases Boosts Market Demand

Cardiovascular diseases, such as coronary artery disease and strokes, require regular monitoring and diagnostic imaging for effective management. Thus, their increasing cases in Japan are propelling the requirement for portable ultrasound devices, as they are known for their convenience and efficiency in providing accurate diagnostic results. According to the estimates of an article published in the Journal of Cardiology in March 2024, more than 310,000 people die annually in Japan from cardiovascular diseases.

Additionally, the geriatric population suffering from such conditions prefers minimally invasive procedures, further driving the demand for portable ultrasound devices. Meanwhile, technological advancements in portable ultrasound devices, such as improved imaging quality and compact designs, are further boosting their adoption. Healthcare providers in Japan are increasingly integrating these devices into their practices to enhance patient care and streamline diagnostic processes.

3D and 4D Ultrasounds Account for Significant Share of the Market

3D and 4D ultrasound devices account for the major share of the market because of their advanced imaging capabilities, versatility, and increasing applications across various medical fields. These devices provide highly detailed images that are essential for accurate diagnosis and treatment of various chronic diseases and in prenatal care, cardiology, and musculoskeletal imaging. In obstetrics and gynecology, these devices allow for real-time visualization of fetal movements and anatomy, allowing for enhanced diagnostic precision and improved patient experience. Meanwhile, in diagnostic applications, these devices provide better visualization of abnormalities and organ structures, making them increasingly valuable for medical professionals.

Hospitals and Specialty Clinics Holds Major Market Share

The growth of the segment can be attributed to the increasing efforts of the country's government to upgrade the healthcare infrastructure and rising investments by hospitals towards advanced medical devices to provide high quality care to the patient population. Meanwhile, various hospitals across Japan are adding baby hatches to their infrastructure due to the escalating social and economic pressures in the country. For instance, in April 2025, San-ikukai Hospital in Tokyo's Kinshicho district installed a baby hatch to allow new mothers who cannot care for their infants to anonymously leave the infants in the hatch. Such measures are also expected to bolster the requirement for various diagnostic solutions including portable ultrasound devices in order to ensure that the infants are provided with high quality care and for detecting any abnormalities in a timely manner.

Future Market Scenario (FY2026 - FY2033F)

The market is expected to witness significant growth in the coming years due to increasing investments in the healthcare sector, rising emphasis on early disease detection, and growing technological advancements in the diagnostics sector. Meanwhile, the integration of AI and enhanced connectivity features in portable ultrasound devices are further expected to improve workflow efficiency and diagnostic accuracy. Additionally, increasing collaborations between medical device manufacturers and healthcare institutions in the coming years are expected to facilitate the development of tailored diagnostic solutions that address specific clinical requirements of the patient population, further driving the market's growth and expansion.

Key Players Landscape and Outlook

The key players of the market are increasingly engaging in mergers and acquisitions and collaborations to bolster the development of advanced diagnostic devices, including portable ultrasounds and strengthen their position in the market. For instance, in January 2024, Olympus Corporation and Canon Medical Systems Corporation entered into a collaborative agreement

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to launch a jointly developed ultrasound system by deploying technologies and expertise from both companies. Olympus will perform the marketing and sales efforts, while Canon will manufacture and develop diagnostic ultrasound systems. This collaboration is allowing both the companies to expand their presence in the diagnostic imaging segment and providing lucrative growth opportunities for the market.

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