

## **Japan Nuclear Imaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-08-01 | 65 pages | Mordor Intelligence

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### **Report description:**

Japan Nuclear Imaging Market Analysis

The Japan nuclear imaging market size is valued at USD 431.71 million in 2025 and is projected to reach USD 678.91 million by 2030, reflecting a 9.50% CAGR over the forecast period. Japan's well-funded universal health-insurance system, rapid population aging, and deep installed base of SPECT and PET scanners make it the world's most densely equipped diagnostic-imaging environment. Government incentives that link green-transformation spending to domestic isotope production, combined with hospital demand for AI-enhanced workflow tools, fuel steady equipment upgrades. Strategic consolidation, highlighted by GE HealthCare's full acquisition of Nihon Medi-Physics, is reshaping supplier power and accelerating local radiopharmaceutical innovation. Simultaneously, breakthroughs in alpha-particle therapy isotopes and deep-learning reconstruction algorithms are opening precision-oncology revenue streams that offset reimbursement pressure on conventional SPECT cardiac studies.

Japan Nuclear Imaging Market Trends and Insights

Rising Prevalence of Cardiovascular Diseases in Aging Population

Japan now counts more than 36 million residents aged 65 years or older, driving persistent demand for nuclear cardiology examinations that evaluate myocardial perfusion with technetium-99m agents. Hospitals are prioritizing high-sensitivity SPECT/CT upgrades to identify sub-clinical ischemia in asymptomatic seniors, a shift aligned with the Japan Radiological Society database that houses roughly 500 million de-identified images for AI training. Deep-learning reconstruction tools shorten acquisition times,

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lowering patient dose while preserving resolution, which improves throughput in congested urban facilities. Government policy encouraging value-based radiology further cements functional imaging as a standard work-up ahead of costly interventional procedures. The demographic effect therefore establishes a long-run volume floor for SPECT cardiac services despite competitive CT angiography technologies.

#### Expanding Insurance Coverage for Advanced Imaging

In April 2025, the Ministry of Health, Labour and Welfare broadened reimbursement for florbetapir-18F amyloid PET from diagnostic use to post-treatment monitoring of Alzheimer's therapy, cutting out-of-pocket costs and incentivizing facilities to install additional PET capacity. Similar coverage shifts are under review for PSMA-targeted tracers and theranostic agents, signaling a reimbursement pathway that links early detection to long-term cost containment. Rural prefectures benefit disproportionately because expanded coverage offsets travel expenses to metropolitan hospitals. Insurers also tie higher scan fees to adherence with AI-enabled dose-reduction protocols, encouraging adoption of advanced reconstruction software. As a result, payer policy increasingly guides purchasing decisions toward hybrid PET/MRI systems and AI-ready SPECT cameras.

#### Chronic Shortage of Mo-99 Global Supply Chain Disruptions

More than 85% of Japanese nuclear-medicine scans rely on technetium-99m, yet the isotope's parent Mo-99 is sourced mainly from aging foreign reactors that face unplanned outages. Import delays force hospitals to reschedule procedures and divert demand to CT or MRI, cutting SPECT utilization. Research cyclotrons have validated proton bombardment of natural molybdenum to make carrier-free technetium-99m, but scaling remains capital intensive. The interim risk drives bulk-purchasing alliances among major hospital chains and supports government interest in domestic isotope plants.

Other drivers and restraints analyzed in the detailed report include:

Government Funding for Theranostic Isotope Production Capabilities / Integration of AI-Based Reconstruction Algorithms Improving Image Quality / Stringent Regulatory Hurdles for Cyclotron Installation Licenses /

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

Equipment accounted for 62.34% of Japan nuclear imaging market share in 2024, underscoring the modality's entrenched role in routine cardiology and bone procedures. The segment's installed base benefits from comparatively low capital cost, abundant technologist expertise, and versatile isotope chemistry. Modern cadmium-zinc-telluride detectors lift energy resolution and shorten scan times, features that preserve SPECT relevance against PET challengers. Vendors bundle AI-enabled dose-optimization software to align with insurer dose-ceiling rules, reinforcing replacement sales cycles.

Radioisotopes though representing a small fraction of equipment units, is projected to post a 9.84% CAGR through 2030, the fastest in the modality mix. Clinical uptake accelerates in neurology and oncology centers where simultaneous metabolic and soft-tissue imaging improves lesion characterization. Shimadzu's FDA-cleared BresTome time-of-flight PET device marks Japan's innovation push into organ-specific imaging. On the radioisotope side, technetium-99m retains volume leadership, yet fluorine-18 tracers grow briskly as cyclotron capacity expands. Emerging alpha emitters such as astatine-211 promise differentiated therapeutics, positioning equipment vendors to cross-sell shielded hot-cells and theranostic workflow software. Consequently, the Japan nuclear imaging market sees a dual track: high-volume SPECT installations in regional centers and premium PET/MRI suites in tertiary hospitals.

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The Japan Nuclear Imaging Market Report is Segmented by Product (Equipment: PET/CT Scanners, SPECT/CT Scanners, PET/MRI Scanners; Radioisotopes: SPECT and PET Radioisotopes), Application (Cardiology, Neurology, Thyroid, Oncology, Other Applications), and End User (Hospitals, Diagnostic Imaging Centres, Academic & Research Institutes). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

GE Healthcare / Siemens Healthineers / Canon / Nihon Medi-Physics Co., Ltd. / Fujifilm Healthcare Corporation / Shimadzu / Hitachi, Ltd. (Healthcare) / Koninklijke Philips / IBA (Ion Beam Applications SA) / Bracco Imaging S.p.A. / Cardinal Health / Eckert & Ziegler AG /

Additional Benefits:

The market estimate (ME) sheet in Excel format /  
3 months of analyst support /

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