

Japan Syringe Market - Strategic Insights and Forecasts (2026-2031)

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Abstracts

The Japan Syringe market is forecast to grow at a CAGR of 4.3%, reaching USD 601.9 million in 2031 from USD 487.6 million in 2026.

The Japan syringe market occupies a critical position within one of the world's most advanced and stringently regulated healthcare systems. As the country navigates an accelerating demographic transition characterized by a rapidly expanding geriatric population, the demand for injectable drug delivery systems across hospital, clinic, and home healthcare settings remains structurally elevated. The market's trajectory is defined by a clear technological shift: sustained volume from chronic disease management intersects with a quality-driven imperative for advanced safety-engineered and prefilled syringe platforms, shaped by the Pharmaceuticals and Medical Devices Agency (PMDA) and the Ministry of Health, Labour and Welfare (MHLW). Participants operating in this environment must balance cost-efficient commodity supply with continuous innovation in specialized, high-margin delivery solutions.

Market Drivers

The escalating prevalence of chronic non-communicable diseases among Japan's aging population is the primary volume driver. Conditions including diabetes, rheumatoid arthritis, and oncological diseases necessitate long-term, routine injectable administration, sustaining baseline demand for conventional syringes across institutional settings. The concurrent expansion of Japan's domestic biologics and biosimilars pipeline amplifies demand for glass prefilled syringes, which offer the chemical compatibility, gas barrier properties, and low extractables and leachables profiles required to maintain the potency and stability of high-value protein-based drugs. In November 2025, Kyowa Kirin launched a prefilled syringe formulation of Crysvida

(burosumab) in Japan for the treatment of X-linked hypophosphatemia, reflecting the commercial momentum of prefilled delivery formats. In July 2025, Celltrion launched Steqeyma, a biosimilar to ustekinumab, in injectable syringe format, contributing incremental demand in the autoimmune therapy segment.

Regulatory mandates from the MHLW reinforcing infection control and needlestick injury prevention are driving institutional procurement away from conventional exposed-needle systems toward safety syringes and auto-retractable mechanisms. The MHLW's integration of ISO 80369 series standards for small-bore connectors is simultaneously accelerating product obsolescence cycles, creating demand for new compliant Luer lock syringe designs across all procurement categories.

Market Restraints

Competitive displacement from alternative delivery technologies represents the most significant structural headwind. Widespread clinical and patient preference for insulin pens and autoinjectors for chronic self-injection therapies is eroding demand in the traditional insulin syringe segment. This shift is particularly pronounced in Japan, where patient-centric design and ease of use are prioritized in chronic care protocols. The insulin syringe segment is therefore characterized as a declining legacy category, with residual demand limited to neonatal care, precise low-dose pediatric applications, and cost-sensitive patient populations without full insurance coverage for premium pen devices.

Raw material cost volatility also constrains margins in the high-volume plastic syringe segment. Medical-grade polypropylene pricing correlates with crude oil and polymer manufacturing cycles, placing continuous downward pressure on profitability for commodity product lines.

Technology and Segment Insights

The glass material segment is the market's high-growth, high-margin category, driven by pharmaceutical industry demand for silicone oil-free prefillable systems that minimize protein aggregation risk in biologic drug formulations. TERUMO's PLA-JEX platform and silicone oil-free product line directly address this requirement. The plastic syringe segment retains dominance by volume, serving conventional hospital and clinical applications across multiple care settings. By syringe type, conventional syringes, including Luer lock, catheter tip, and eccentric tip variants, serve the broadest application range, while the insulin syringe segment undergoes gradual structural

contraction. Smaller volume syringes are gaining relative importance in the context of pediatric care and precision biologic dosing, while larger volume formats serve procedural and substation applications.

Competitive and Strategic Outlook

The competitive landscape features intense rivalry between globally dominant players and entrenched domestic manufacturers. BD leverages its global scale in safety and prefillable technology, with the commercial launch in September 2024 of the BD Neopak XtraFlow Glass Prefillable Syringe, designed to optimize subcutaneous delivery of high-viscosity biologics. BD simultaneously increased Neopak platform production capacity sevenfold through a new high-volume manufacturing line in France. TERUMO holds a dominant domestic position built on deep institutional relationships and technological differentiation in pre-filled and low-silicone platforms. Nipro competes through its D2F Direct-to-Fill glass prefillable syringe line and expanded production capacity at its German manufacturing facility, reinforcing global supply resilience. B. Braun, Teleflex, and ICU Medical serve complementary segments within the broader Japanese hospital procurement ecosystem.

Key Takeaways

The Japan syringe market is set for steady, quality-driven growth through 2031, underpinned by demographic inevitability, a maturing biologics pipeline, and regulatory frameworks that continuously raise the performance bar for syringe design and safety. Manufacturers capable of delivering compliant, high-specification prefillable and safety-engineered systems while maintaining supply chain resilience will be best positioned to capture the market's highest-value procurement opportunities.

Key Benefits of this Report

Insightful Analysis: Gain detailed market insights across regions, customer segments, policies, socio-economic factors, consumer preferences, and industry verticals.

Competitive Landscape: Understand strategic moves by key players to identify optimal market entry approaches.

Market Drivers and Future Trends: Assess major growth forces and emerging developments shaping the market.

Actionable Recommendations: Support strategic decisions to unlock new revenue streams.

Caters to a Wide Audience: Suitable for startups, research institutions, consultants, SMEs, and large enterprises.

What businesses use our reports for

Industry and market insights, opportunity assessment, product demand forecasting, market entry strategy, geographical expansion, capital investment decisions, regulatory analysis, new product development, and competitive intelligence.

Report Coverage

Historical data from 2021 to 2025 and forecast data from 2026 to 2031

Growth opportunities, challenges, supply chain outlook, regulatory framework, and trend analysis

Competitive positioning, strategies, and market share evaluation

Revenue growth and forecast assessment across segments and regions

Company profiling including strategies, products, financials, and key developments

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