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Japan Ultrasound Devices Market Assessment, By Product Type [Diagnostic Ultrasound Systems, Therapeutic Ultrasound], By Portability [Trolley/Cart-Based, Compact/Handheld], By Display [Colored, Black & White], By End-user [Hospitals, Diagnostic Centers, Ambulatory Care Centers, Surgical Centers, Others], By Application [Radiology, Cardiology, Obstetrics & Gynecology, Gastroenterology, Urology, Others], By Distribution Channel [Online, Offline], By Region, Opportunities and Forecast, FY2017-FY2031F

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Abstracts

Japan ultrasound devices market witnessed a CAGR of 5.8% during the forecast period, FY2024-FY2031, and is expected to be valued at USD 865 million in FY2031, from USD 551 million in FY2023. The Japan ultrasound devices market has been experiencing notable growth, driven by several key drivers and recent innovations. As Japan's population ages, there is an escalating demand for advanced medical imaging technologies to cater to the rising incidence of chronic diseases and age-related conditions. Ultrasound devices, known for their non-invasive and safe nature, have emerged as a preferred choice for medical imaging, facilitating early detection, and monitoring of various health conditions.

One of the significant drivers propelling the market is the continuous advancement in ultrasound technology. Recent innovations have improved image quality, portability, and the integration of features like 3D/4D imaging and artificial intelligence (AI)-assisted

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diagnostics. These developments have revolutionized medical imaging, providing healthcare professionals with more accurate and comprehensive insights, thereby enhancing patient care.

Furthermore, the latest innovations in the Japan ultrasound devices market include incorporating AI algorithms to automate and streamline the diagnostic process. AI-powered ultrasound systems can assist in detecting anomalies, aiding in faster and more precise diagnoses. Additionally, the integration of wireless technology in ultrasound devices has increased their mobility and accessibility, making point-of-care applications more efficient and convenient. As companies continue to invest in research and development, and the healthcare industry embraces technological advancements, the Japan ultrasound devices market is poised for further growth. These advancements will play a vital role in meeting the increasing demand for sophisticated medical imaging solutions, improving healthcare outcomes and overall patient well-being nationwide.

For example, in 2023, The EDAP ExactVu ultrasound biopsy system has received approval for use in Japan. This advanced medical device provides high-resolution real-time imaging, allowing for precise and accurate targeted biopsies. With the approval, Japanese healthcare professionals can now leverage the system's capabilities to enhance diagnostic accuracy and improve patient care in the field of urology.

Increased Use of Portable Ultrasound

The increasing use of portable ultrasound devices is expected to drive the growth of the Japan ultrasound devices market. Portable ultrasound devices are becoming increasingly popular due to their compact size, mobility, and ease of use. They are useful in emergency and critical care situations, where quick diagnosis and treatment is essential. Moreover, portable ultrasound devices can potentially improve access to medical care, especially in rural areas where access to medical facilities may be limited. With the growing demand for non-invasive diagnostic procedures and the increasing need for quick diagnosis and treatment, the use of portable ultrasound devices is expected to increase in Japan. This trend is likely to contribute significantly to the growth of the ultrasound devices market in the country, particularly for local players who specialize in developing and manufacturing portable ultrasound devices.

Rise of Technology Development

The technological developments are expected to drive the growth of the Japan ultrasound devices market. Technology advancements have led to innovative

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ultrasound devices that offer higher image resolution, improved diagnostic accuracy, and enhanced functionality. For instance, the integration of artificial intelligence (AI) in ultrasound devices has the potential to improve the accuracy and efficiency of diagnosis by providing automated image analysis and interpretation. Additionally, the development of miniaturized ultrasound probes, 3D/4D imaging, and elastography technology have further improved the capabilities of ultrasound devices. With the increasing demand for accurate and efficient diagnosis, healthcare providers in Japan are expected to adopt these advanced ultrasound devices. This trend will likely result in significant growth of the Japan ultrasound devices market, as both multinational and local companies continue to invest in research and development to bring advanced ultrasound devices into the market.

For example, Hologic Japan Co., Ltd., a Japanese subsidiary of the leading women's health company, Hologic, Inc., has commenced sales for the ultrasound imaging devices, HOLOGIC SUPERSONIC TM MACH 30 and HOLOGIC SUPERSONIC TM MACH 20, since December 20, 2022. The SUPERSONIC TM MACH series is distinguished by its unique UltraFast technology, which delivers high-quality B-mode images, and its SWE PLUS TM imaging capability, allowing for the measurement of elastic modulus up to 1200kPa. Furthermore, these devices are equipped with Vi PLUS TM Imaging, enabling quantitative viscosity measurements. With these advanced features, Hologic aims to provide innovative solutions for enhanced ultrasound imaging and diagnostics in the women's health field.

Increase in Fetal and Neonatal Care

The Japan ultrasound devices market has witnessed an increase in fetal and neonatal care, driven by a growing emphasis on maternal and child health. Ultrasound devices are crucial in monitoring pregnancies, diagnosing fetal anomalies, and assessing neonatal health. The non-invasive nature of ultrasound imaging makes it a safe and effective tool for prenatal and postnatal care, further fueling its adoption in healthcare facilities nationwide. Additionally, advancements in ultrasound technology have improved image resolution and enabled detailed examinations, boosting the accuracy of diagnoses. As Japan's healthcare infrastructure continues to evolve, and with a rising number of pregnancies and neonatal cases, the demand for advanced ultrasound devices for fetal and neonatal care is expected to remain upward.

Impact of COVID-19

The pandemic had a mixed impact on the Japan ultrasound devices market. During the

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initial phase of the pandemic, there was a decline in the demand for non-emergency medical procedures, including ultrasound scans, due to the fear of infection and the prioritization of COVID-19 patients. This led to a slowdown in the demand for ultrasound devices in the country. However, as the pandemic improved and medical facilities resumed their operations, the demand for ultrasound devices rose again.

Additionally, the pandemic brought attention to the need for remote healthcare services, which led to a greater adoption of telemedicine and remote monitoring technologies that use ultrasound devices. The Japanese government has been promoting the adoption of digital health technologies, including ultrasound devices, which is expected to drive the growth of the market in the coming years. Despite the initial slowdown, the Japan ultrasound devices market is expected to recover and grow, owing to the increasing demand for non-invasive diagnostic procedures, the government's initiatives to promote digital healthcare, and the growing adoption of remote healthcare services.

Impact of Russia-Ukraine war

The Russia-Ukraine war potentially indirectly impacts the Japan ultrasound devices market. As geopolitical tensions rise and economic uncertainties persist, global trade dynamics have been affected, leading to potential disruptions in the supply chain for medical devices, including ultrasound equipment. Japan, a major exporter of medical devices and reliant on various components from different countries, could experience challenges in sourcing materials and parts, causing delays in production and distribution. Additionally, shifts in international relations led to changes in export-import policies, affecting the overall market dynamics. However, the extent of the impact would depend on the duration and severity of the conflict and the measures taken by governments and businesses to mitigate its effects on international trade.

Key Player Landscape and Outlook

Most of organizations are engaged in the design, production, and marketing of a variety of ultrasound equipment to meet the needs of various medical specializations. In the forecast years, the market for ultrasound equipment in Japan is anticipated to expand rapidly due to the rising need for non-invasive diagnostic treatments. The major market participants are concentrating on product creativity and distinctiveness to obtain a competitive advantage. To create technologically enhanced goods with higher image quality, enhanced ergonomics, and increased mobility, the competitors are making additional investments in study and development operations. Moreover, it is expected that the government's attempts to encourage the implementation of digital health

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technology would help the local market participants to start new prospects for development and expansion.

For instance, FUJIFILM Corporation's achieved 'Red Dot Design Award: Product Design 2022'. The company's wireless ultrasound diagnostic imaging devices, 'iViz air' and 'iViz air Conevx,' received the highest-ranked 'Best of the Best Award,' showcasing the company's commitment to innovation and excellence in product design.

In 2023, Triple W Japan, headquartered in Tokyo, has created DFree, a wearable urinary incontinence gauge utilizing ultrasound technology to track the need for bathroom breaks. Weighing approximately 26 grams and featuring an ultrasound sensor, this small device is worn on the lower abdomen, providing real-time measurements of bladder distension. The gadget connects to a phone or dedicated device, displaying urine accumulation on a 10-point scale and send notifications whe n it's time to use the restroom. The technology offers convenience and discretion for individuals managing urinary incontinence.

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