

Japan Cancer Supportive Care Market, By Therapeutics Class (G-CSFs (Granulocyte-colony Stimulating Factors), ESAs (Erythropoiesis Stimulating Agents), Anti-emetics, Bisphosphonates, Opioids, NSAIDs, Others), By Region, Competition Forecast & Opportunities, 2020-2030F

<https://marketpublishers.com/r/JEA0C55F340CEN.html>

Date: September 2024

Pages: 82

Price: US\$ 3,500.00 (Single User License)

ID: JEA0C55F340CEN

Abstracts

Japan Cancer Supportive Care Market was valued at USD 365.25 Million in 2024 and is anticipated to project steady growth in the forecast period with a CAGR of 2.25% through 2030. Vitamin supplements are designed to enhance the regular diet by providing individuals with the necessary daily nutritional value. Vitamins play crucial roles in the development and proper functioning of the body, acting as hormones, coenzymes, and antioxidants. Various factors such as shifting dietary preferences, busy lifestyles, rising employment rates, and increased awareness of the health benefits associated with vitamin supplements are expected to positively influence the market growth.

Due to hectic schedules, many individuals struggle to maintain a balanced diet, resulting in nutrient deficiencies. Consequently, there has been a significant rise in the consumption of vitamin supplements to fulfill daily nutrient and vitamin requirements, promoting overall health and vitality. Furthermore, the increasing healthcare expenditure worldwide is anticipated to drive the demand for vitamin supplements. Additionally, the growing elderly population in both developed and developing economies presents lucrative opportunities for market players in the forecast period. The senior population, in particular, relies on vitamin supplements to meet their dietary needs, promote bone health, and support overall well-being.

Key Market Drivers

Increasing Cancer Incidence

Increasing cancer incidence is a critical driver of the growth of the Japan Cancer Supportive Care Market, impacting various aspects of healthcare demand and service provision. As cancer incidence rises in Japan, the number of patients requiring supportive care increases proportionately. In Japan, cancer has been the leading cause of death since 1981, accounting for one-third of all fatalities in this nation known for its high life expectancy. According to the National Cancer Center of Japan, it is estimated that there were 1,019,000 new cancer cases and 380,400 cancer-related deaths in 2022. This surge in patient population creates a substantial demand for a wide range of supportive care services, including pain management, nutritional support, psychological counseling, and rehabilitation. Cancer treatment often involves prolonged and intensive therapy, leading to chronic and acute side effects that necessitate ongoing supportive care. The increasing number of patients enduring these side effects amplifies the need for comprehensive and sustained supportive care services.

With more patients undergoing cancer treatments such as chemotherapy, radiation, and surgery, there is a heightened need for effective symptom management. Supportive care therapies that alleviate pain, nausea, fatigue, and other treatment-related symptoms become essential components of the overall cancer care plan. The primary goal of supportive care is to enhance the quality of life for cancer patients. As the incidence of cancer rises, so does the demand for interventions that help patients manage their symptoms, maintain functionality, and achieve a better quality of life during and after treatment. The rising incidence of cancer puts additional strain on healthcare infrastructure, requiring expansion and enhancement of supportive care services to meet growing patient needs. This necessitates investment in specialized facilities, advanced medical equipment, and trained healthcare professionals. The complexity of cancer treatment and supportive care requires multidisciplinary teams of oncologists, nurses, pharmacists, nutritionists, and mental health professionals. The increasing cancer incidence drives the formation and expansion of these teams to provide comprehensive and coordinated care.

The growing cancer patient population stimulates research and development of new supportive care therapies. Pharmaceutical companies and medical device manufacturers are incentivized to innovate and develop advanced treatments that address the specific needs of cancer patients, leading to a more robust pipeline of supportive care products. Increased incidence of cancer leads to more clinical trials and

studies focused on improving supportive care outcomes. These research efforts contribute to the development of evidence-based practices and novel therapies that enhance patient care and drive market growth. Rising cancer incidence correlates with increased healthcare spending on cancer treatment and supportive care. Government healthcare budgets and insurance coverage expand to accommodate the growing demand, leading to greater investment in supportive care services and infrastructure. As the economic burden of cancer treatment grows, the cost-effectiveness of supportive care becomes more apparent. Effective supportive care can reduce hospital admissions, shorten treatment durations, and prevent complications, ultimately lowering overall healthcare costs and justifying further investment in these services.

Rising Awareness and Demand for Quality of Life Improvements

The rising awareness and demand for quality of life improvements significantly drive the growth of the Japan Cancer Supportive Care Market. This dynamic is multifaceted, encompassing patient education, caregiver involvement, healthcare provider initiatives, and societal shifts towards holistic care.

As awareness about cancer and its treatment options increases, patients become more informed about the importance of supportive care in managing symptoms and enhancing quality of life. Knowledgeable patients are more likely to seek comprehensive supportive care services, driving demand for a range of therapies, from pain management to nutritional support. In Japan, the most prevalent cancers are breast, colorectal (large bowel), prostate, stomach, and lung cancers. These five types accounted for 60.7% of all new cancer diagnoses in 2012. Survival rates for these cancers have generally improved since the 1990s. Notably, the five-year age-standardized survival rate for prostate cancer increased significantly from 65.7% in 1995-1999 to 86.8% in 2005-2009. In 2012, Japan recorded the second-highest age-standardized five-year survival rate for lung cancer globally. Cancer advocacy groups and non-profit organizations play a pivotal role in educating the public about the benefits of supportive care. These groups often provide resources, support networks, and informational campaigns that highlight how supportive care can alleviate treatment side effects and improve overall well-being, thus encouraging more patients to utilize these services. As caregivers become more aware of the impact of cancer treatment on patients' quality of life, they increasingly advocate for supportive care interventions. Caregivers, often family members, seek out information and resources to help manage the emotional, physical, and psychological challenges faced by cancer patients, driving demand for supportive care products and services. Caregiver support networks and educational programs provide valuable information on how to manage side effects and

improve the daily lives of cancer patients. These initiatives help caregivers make informed decisions about supportive care, contributing to market growth.

Healthcare providers are increasingly adopting holistic and patient-centered care models that emphasize quality of life. This approach involves integrating supportive care services into standard oncology treatment protocols, ensuring that patients receive comprehensive care that addresses not only their medical needs but also their emotional and psychological well-being. The formation of multidisciplinary teams that include oncologists, nurses, psychologists, nutritionists, and social workers ensures that all aspects of a patient's health are considered. These teams work collaboratively to develop individualized supportive care plans, enhancing patient outcomes and driving demand for supportive care services. There is a growing cultural shift towards valuing holistic and integrative care approaches in Japan. Society increasingly recognizes that addressing the emotional, psychological, and social aspects of cancer care is as important as treating the disease itself. This cultural shift supports the growth of supportive care services that focus on improving patients' overall quality of life. Healthcare providers and policymakers are placing greater emphasis on quality of life metrics when evaluating cancer treatment outcomes. This focus on holistic measures encourages the adoption of supportive care services designed to enhance patients' well-being throughout their treatment journey.

The rise of telehealth and remote monitoring technologies allows for continuous support and symptom management for cancer patients, even from a distance. These technologies provide patients with easier access to supportive care services, increasing their utilization and driving market growth. Wearable devices and mobile health applications that monitor vital signs, track symptoms, and provide real-time feedback enable patients to manage their condition more effectively. These tools enhance patients' ability to maintain quality of life, leading to higher demand for integrated supportive care solutions. Government policies and initiatives aimed at improving cancer care often include provisions for supportive care services. Increased funding and support for these initiatives help expand access to high-quality supportive care, contributing to market growth. Enhanced insurance coverage for supportive care therapies reduces the financial burden on patients, making these services more accessible. Policies that cover a wide range of supportive care options encourage patients to seek comprehensive care, driving demand in the market.

Increase in the Aging Population

The aging population is a significant driver of growth in the Japan Cancer Supportive

Care Market. This demographic shift impacts healthcare demand and service provision in various ways, fueling the need for comprehensive supportive care services. Cancer incidence is significantly higher among older adults, who are more susceptible to the disease due to age-related changes in their bodies and cumulative exposure to risk factors. Japan is experiencing rapid aging, with individuals aged 65 and over representing 27.7% of the total population as of 2017. This proportion is the highest globally and is projected to increase steadily, reaching 38.4% by 2065. As Japan's population ages, the number of elderly cancer patients rises, increasing the demand for supportive care services tailored to their needs. Older adults often have multiple comorbidities that complicate cancer treatment and necessitate comprehensive supportive care. Managing these additional health conditions alongside cancer requires specialized interventions, driving demand for a wide range of supportive care services. Elderly cancer patients often require longer treatment durations and extended recovery periods. Supportive care services play a crucial role in helping these patients manage chronic symptoms, recover from surgery, and cope with the long-term effects of cancer treatments, leading to sustained demand for these services. Recovery and rehabilitation are critical for elderly patients to regain functionality and improve their quality of life. The need for rehabilitation services, such as physical therapy and occupational therapy, grows as the population ages, driving market expansion in this area.

The aging population necessitates a focus on geriatric oncology, which involves comprehensive assessments to understand the unique needs of elderly cancer patients. These assessments help tailor supportive care plans, ensuring that interventions are appropriate and effective for older adults, thereby driving demand for specialized supportive care services. Geriatric oncology requires multidisciplinary care teams that include oncologists, geriatricians, nurses, and allied health professionals. These teams work collaboratively to address the complex needs of elderly cancer patients, promoting the integration of supportive care into standard treatment protocols and driving market growth. As the elderly population grows, there is an increasing emphasis on improving the quality of life for cancer patients. Holistic care approaches that address physical, emotional, and psychological well-being are essential for elderly patients, who may experience more severe side effects and complications from treatment. This focus on quality of life drives demand for comprehensive supportive care services. Older adults may face unique emotional and psychological challenges when dealing with cancer. Supportive care services that provide counseling, mental health support, and social services are crucial for improving the overall well-being of elderly patients, contributing to market growth.

Advances in telehealth and remote monitoring technologies have made it easier to

provide continuous support to elderly cancer patients. These technologies enable healthcare providers to monitor patients' health remotely, offer timely interventions, and ensure that supportive care services are accessible to older adults, even in remote or underserved areas. The development of assistive devices and technologies designed for elderly patients, such as mobility aids, adaptive equipment, and home care solutions, enhances the ability of older adults to manage their condition and maintain independence. The growing adoption of these technologies drives the supportive care market. The Japanese government has implemented policies and initiatives to address the healthcare needs of an aging society. These policies often include provisions for cancer care and supportive services, promoting the integration of supportive care into national healthcare plans and driving market growth. Enhanced insurance coverage and reimbursement policies for supportive care services make these interventions more accessible to elderly patients. Financial support from the government and private insurers reduces the economic burden on patients and encourages the use of comprehensive supportive care services.

Key Market Challenges

High Treatment Costs

The cost of cancer treatment, including supportive care, can be prohibitively expensive for many patients. While Japan has a robust national health insurance system, out-of-pocket expenses for advanced supportive care therapies, medications, and specialized services can still be substantial. This financial burden may deter patients from seeking comprehensive supportive care, leading to suboptimal treatment outcomes. High costs also impact healthcare providers and institutions, which must allocate significant resources to procure advanced supportive care technologies and therapies. This allocation often necessitates difficult budgetary decisions, potentially limiting the availability and accessibility of cutting-edge supportive care options.

Payers and policymakers are increasingly scrutinizing the cost-effectiveness of new supportive care treatments and interventions. Demonstrating the value and long-term benefits of these therapies in terms of patient outcomes and healthcare savings is essential but can be challenging, potentially hindering market growth.

Shortage of Specialized Healthcare Professionals

There is a notable shortage of specialized healthcare professionals trained in cancer supportive care, including oncologists, nurses, pharmacists, and allied health

professionals. This shortage is particularly acute in rural and underserved areas, where access to high-quality supportive care services is limited. Addressing the workforce gap requires substantial investment in training and education programs to develop a pipeline of skilled professionals. However, existing educational and training frameworks may not be adequately equipped to meet the growing demand for specialized cancer supportive care expertise.

The demanding nature of cancer care can lead to high levels of burnout among healthcare providers, exacerbating workforce shortages. Ensuring adequate support, work-life balance, and professional development opportunities for healthcare professionals is critical to retaining talent in the field and maintaining high standards of care.

Regulatory Hurdles

The regulatory environment in Japan, while rigorous in ensuring patient safety and treatment efficacy, can be a barrier to the rapid introduction of new supportive care therapies and technologies. The lengthy and complex approval processes for new drugs, medical devices, and treatment protocols can delay market entry and limit the availability of innovative supportive care options. Meeting regulatory requirements involves substantial compliance and documentation efforts, which can be resource-intensive for pharmaceutical companies and healthcare providers. Navigating these regulatory complexities requires expertise and can pose significant operational challenges, particularly for smaller companies and institutions.

Securing reimbursement for new supportive care therapies from national health insurance can be challenging. Payers require robust evidence of clinical efficacy and cost-effectiveness, and the negotiation process for reimbursement rates can be protracted. Delays in securing reimbursement approvals can restrict patient access to new treatments and impact market growth.

Key Market Trends

Advancements in Personalized Medicine

Personalized medicine, which involves tailoring medical treatment to the individual characteristics of each patient, is revolutionizing cancer care. Genetic profiling and biomarker testing enable healthcare providers to identify specific mutations and genetic factors that influence a patient's response to cancer treatment. This precision allows for

the development and administration of targeted supportive care therapies that are more effective and have fewer side effects compared to traditional approaches. Personalized supportive care plans, including optimized dosing regimens and prophylactic treatments, enhance patient outcomes by minimizing treatment-related complications and improving quality of life. This trend is driving the adoption of more sophisticated and individualized supportive care strategies in Japan.

The trend towards personalized medicine encourages pharmaceutical companies to invest in research and development of novel supportive care drugs and therapies tailored to specific patient populations. This innovation pipeline is expected to introduce advanced supportive care options, further fueling market growth.

Integration of Digital Health Technologies

The integration of digital health technologies, such as telemedicine and remote patient monitoring, is transforming the landscape of cancer supportive care in Japan. Telemedicine platforms enable cancer patients to consult with their healthcare providers from the comfort of their homes, ensuring continuous and timely access to supportive care services, particularly for those in remote or underserved areas.

Wearable devices and mobile health applications allow for real-time monitoring of patients' vital signs, symptoms, and treatment adherence. These tools provide valuable data that can be used to promptly address complications, manage side effects, and adjust supportive care interventions as needed. This proactive approach enhances patient management and improves overall care quality. Advanced data analytics and artificial intelligence (AI) technologies are being leveraged to analyze large volumes of patient data, predict treatment outcomes, and optimize supportive care protocols. AI-driven tools can identify patterns and trends, enabling healthcare providers to make more informed decisions and deliver personalized care more efficiently.

Focus on Holistic and Patient-Centered Care

There is a growing recognition of the importance of holistic and patient-centered care in cancer treatment. This approach involves addressing not only the physical aspects of cancer but also the emotional, psychological, and social needs of patients. Supportive care services are increasingly incorporating multidisciplinary teams that include oncologists, nurses, nutritionists, psychologists, and social workers to provide comprehensive care. Educating patients about their condition, treatment options, and self-care strategies is becoming a key component of supportive care. Empowering

patients with knowledge and resources enables them to take an active role in managing their health and improves adherence to supportive care regimens. This trend is driving the development of educational programs and resources tailored to the needs of cancer patients and their families.

Enhancing the quality of life for cancer patients is a central goal of supportive care. This involves not only managing symptoms and side effects but also addressing issues such as pain management, nutritional support, mental health, and social support. The focus on improving quality of life is leading to the adoption of innovative therapies and interventions that prioritize patient well-being and satisfaction.

Segmental Insights

Therapeutics Class Insights

Based on Therapeutics Class, the Granulocyte Colony Stimulating Factor (G-CSF) segment emerged as the dominant in the market for Japan Cancer Supportive Care in 2024. G-CSF is pivotal in the supportive care of cancer patients undergoing chemotherapy. Chemotherapy often results in neutropenia, a significant reduction in white blood cells, increasing infection risk. G-CSF stimulates the bone marrow to produce more white blood cells, thereby reducing the duration and severity of neutropenia. This makes it an indispensable therapeutic class in oncology supportive care. The efficacy of G-CSF in preventing and managing neutropenia has been well-documented through numerous clinical trials and real-world studies. Its ability to reduce the incidence of febrile neutropenia, decrease hospitalization rates, and allow for the maintenance of chemotherapy dose intensity is widely recognized. The established safety profile of G-CSF further bolsters its adoption among healthcare providers.

Due to its proven benefits, G-CSF is extensively prescribed by oncologists in Japan. It is a standard component of chemotherapy regimens for various cancers, including breast, lung, and lymphoma. The consistent use of G-CSF across multiple cancer types and stages significantly contributes to its dominance in the cancer supportive care market. Japan's advanced healthcare infrastructure ensures the effective delivery and monitoring of G-CSF therapy. Hospitals and oncology centers are equipped with the necessary resources to administer G-CSF and manage any potential side effects, ensuring optimal patient outcomes. This infrastructure supports the widespread use of G-CSF, further solidifying its market position.

Continuous innovation in the G-CSF segment has led to the development of long-acting

formulations, such as pegfilgrastim, which require less frequent dosing compared to traditional short-acting G-CSF. These advancements improve patient compliance and convenience, making G-CSF therapy more attractive to both patients and healthcare providers. The availability of biosimilars has also increased accessibility and affordability, driving market growth. The Japanese regulatory framework supports the use of G-CSF by ensuring rigorous evaluation of its safety and efficacy. Approval of new G-CSF formulations and biosimilars is streamlined, allowing for timely access to these therapies. Additionally, favorable reimbursement policies make G-CSF therapy financially viable for patients, encouraging its widespread use. These factors collectively contribute to the growth of this segment.

Regional Insights

Kanto emerged as the dominant in the Japan Cancer Supportive Care market in 2024, holding the largest market share in terms of value. The Kanto region, encompassing Tokyo and its surrounding prefectures, is one of the most populous areas in Japan. The high population density translates into a higher absolute number of cancer cases, necessitating extensive supportive care services. This demand drives the market growth as healthcare providers and institutions seek to address the needs of a large patient base.

Kanto is home to some of the most advanced healthcare facilities in Japan. These institutions are equipped with state-of-the-art technology and are staffed by highly trained medical professionals. The presence of such facilities ensures that cancer patients receive comprehensive supportive care, including pain management, nutritional support, psychological counseling, and rehabilitation services. The high quality of care provided in this region enhances patient outcomes and drives market growth. The Kanto region houses numerous leading medical institutions and cancer treatment centers, such as the National Cancer Center Hospital and the University of Tokyo Hospital. These institutions not only provide cutting-edge cancer treatments but also offer specialized supportive care services. Their reputation for excellence attracts patients from across Japan, further solidifying Kanto's dominance in the market.

The Kanto region is a hub for medical research and innovation. Numerous pharmaceutical companies and research institutions are based here, driving advancements in cancer treatment and supportive care. Ongoing research initiatives and clinical trials contribute to the development of new supportive care therapies and improve existing ones, ensuring that patients in Kanto have access to the latest and most effective care options. The economic prosperity of the Kanto region allows for

significant investment in healthcare infrastructure and services. Both public and private sectors allocate substantial resources to enhance cancer care facilities, procure advanced medical equipment, and train healthcare professionals. This financial capability ensures the continuous improvement and expansion of supportive care services, catering to the growing needs of cancer patients.

Key Market Players

Amgen, Inc.

Merck & Co., Inc.

Johnson & Johnson Services, Inc.

Heron Therapeutics, Inc.

Novartis AG

GSK plc

F. Hoffmann-La Roche Ltd.

Helsinn Healthcare SA

Report Scope:

In this report, the Japan Cancer Supportive Care Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Japan Cancer Supportive Care Market, By Therapeutics Class:

G-CSFs (Granulocyte-colony Stimulating Factors)

ESAs (Erythropoiesis Stimulating Agents)

Anti-emetics

Bisphosphonates

Opioids

NSAIDs

Others

Japan Cancer Supportive Care Market, By Region:

Hokkaido

Tohoku

Kanto

Chubu

Kansai

Chugoku

Shikoku

Kyushu

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Japan Cancer Supportive Care Market.

Available Customizations:

Japan Cancer Supportive Care market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Japan Cancer Supportive Care Market, By Therapeutics Class (G-CSFs (Granulocyte-colony Stimulating Factors), E...

Detailed analysis and profiling of additional market players (up to five).

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