

Japan Periodontal Treatment Market By Therapy (Non-surgical Treatment and Surgical Devices), By End User (Hospitals & Clinics, Ambulatory Surgical Centers, Others), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

Japan Periodontal Treatment Market was valued at USD 33.97 Million in 2024 and is anticipated to project impressive growth in the forecast period with a CAGR of 6.70% through 2030. The Japan Periodontal Treatment Market is primarily driven by several key factors. An increasing awareness of oral health and hygiene among the population has led to greater demand for periodontal treatments. This awareness is supported by educational campaigns and initiatives promoting preventive dental care. Advancements in dental technologies and treatment methods have enhanced the effectiveness and efficiency of periodontal procedures, attracting more patients seeking minimally invasive and pain-free treatments. A growing elderly population in Japan, prone to periodontal diseases, contributes to the market growth as more individuals require specialized periodontal care. Favorable healthcare policies and reimbursement schemes for dental treatments encourage accessibility and affordability, further bolstering the market expansion for periodontal treatments in Japan.

Key Market Drivers

Growing Aging Population

Japan is experiencing rapid aging, positioning itself as the world's leading 'super-aged' society. Currently, 28.7% of its population is aged 65 or older, with women constituting the majority. The country boasts a remarkable 80,000 centenarians. By 2036, seniors aged 65 and over will make up one-third of the population. Since 2011, Japan has also

faced population decline, a unique occurrence among large countries during times of prosperity and peace. Projections indicate that Japan's population will decrease significantly from 127 million in 2015 to 88 million by 2065. Aging is closely associated with an increased risk of periodontal diseases due to factors such as reduced immune response, chronic health conditions, and polypharmacy. Older adults are more susceptible to gum recession, bone loss around teeth, and periodontal infections, which necessitate ongoing periodontal care and treatment. This demographic trend fuels the demand for specialized periodontal services aimed at maintaining oral health and preserving teeth among the elderly population.

Increasing Awareness and Education

Awareness of oral health and hygiene has been steadily rising among the Japanese population, driven by public health campaigns, educational initiatives, and improved access to information through digital and traditional media channels. In January 2024, Fujitsu unveiled a comprehensive health education campaign scheduled to run from January 26, 2024, targeting its approximately 70,000 employees in Japan. The initiative aimed to foster a proactive approach among employees towards maintaining and enhancing their oral and dental health, recognizing its significant impact on overall wellbeing and quality of life. This program emphasizes preventive dentistry practices to effectively manage oral health, while also educating participants on the causes and risks associated with dental caries and periodontal disease.

Dental professionals, healthcare organizations, and governmental bodies actively promote the importance of preventive dental care and regular dental visits to prevent and detect periodontal diseases early. Educational programs in schools, workplaces, and community centers emphasize proper oral hygiene practices, including regular brushing, flossing, and dental check-ups. As individuals become more knowledgeable about the consequences of untreated gum diseases such as gingivitis and periodontitis, there is a growing inclination towards seeking professional periodontal treatments to maintain optimal oral health and overall well-being.

Technological Advancements in Dentistry

Technological innovations in dental care have significantly enhanced the diagnosis, treatment, and management of periodontal diseases in Japan. Advanced imaging techniques such as cone-beam computed tomography (CBCT) provide detailed three-dimensional images of the teeth and surrounding structures, aiding in precise diagnosis and treatment planning for periodontal conditions. Laser technology has revolutionized

periodontal therapy by offering minimally invasive treatment options for gum disease, including laser-assisted periodontal surgery and laser bacterial reduction. These technologies minimize patient discomfort, reduce healing times, and improve treatment outcomes compared to traditional methods.

Digital dentistry tools such as intraoral scanners and computer-aided design/computer-aided manufacturing (CAD/CAM) systems enable dentists to create custom-made dental restorations and prosthetics with exceptional accuracy and efficiency. These advancements not only enhance the patient experience but also optimize treatment results in periodontal care. Continuous research and development in dental materials, biomaterials, and bioengineering further drive innovation in periodontal treatments, offering new avenues for improving oral health outcomes in Japan.

Preventive Healthcare Initiatives

The emphasis on preventive healthcare measures plays a crucial role in shaping the Japan Periodontal Treatment Market. Dental professionals advocate for early intervention and preventive strategies to mitigate the onset and progression of periodontal diseases. Routine dental examinations, professional cleanings, and periodontal screenings are recommended as part of preventive dental care protocols to detect signs of gum disease at an early stage. Dental hygienists educate patients on proper oral hygiene practices and provide personalized recommendations for maintaining healthy gums and teeth. Community-based preventive programs, including school dental health initiatives and workplace wellness programs, promote oral health awareness and encourage regular dental visits among individuals of all ages. By prioritizing prevention, these initiatives contribute to reducing the prevalence and severity of periodontal diseases and enhancing overall oral health outcomes in Japan.

Key Market Challenges

Shortage of Dental Professionals and Workforce Challenges

Japan faces a shortage of dental professionals, including periodontists, dental hygienists, and oral health specialists, which poses challenges for meeting the growing demand for periodontal treatments and dental care services. The aging workforce and limited enrollment in dental education programs contribute to workforce shortages, particularly in rural and underserved areas where access to dental care is already limited. Addressing workforce challenges requires strategic initiatives to recruit and retain dental professionals, expand dental training programs, and implement incentives

to encourage practice in priority areas. Enhancing collaboration between public and private sectors, leveraging telehealth technologies, and optimizing dental workforce distribution are essential for improving accessibility to periodontal treatments and reducing oral health disparities across Japan.

Cost and Affordability of Dental Care

The cost of periodontal treatments and dental care services in Japan poses a significant obstacle for many individuals, especially against the backdrop of economic uncertainties and increasing healthcare expenditures. Periodontal procedures such as surgeries, scaling and root planing, and ongoing maintenance therapies are often associated with substantial expenses, placing financial burdens on patients seeking necessary periodontal care. The high costs stem from various factors including the complexity of treatment protocols, specialized equipment and materials required, and the expertise of dental professionals involved.

Limited insurance coverage for dental treatments further compounds affordability challenges, leaving many patients to cover significant out-of-pocket expenses. This situation disproportionately affects vulnerable populations such as low-income families, elderly individuals living on fixed incomes, and those who lack adequate insurance coverage. For uninsured or underinsured patients, the financial burden of periodontal treatments can be particularly daunting, leading to delayed care or incomplete treatment regimens that may compromise oral health outcomes. Addressing the cost and affordability of periodontal treatments is essential to ensure equitable access to high-quality dental care across diverse socioeconomic groups in Japan. Initiatives aimed at reducing treatment costs, expanding insurance coverage for dental procedures, and implementing financial assistance programs can help alleviate financial barriers to care. Promoting preventive oral health measures and early intervention strategies can mitigate the need for costly treatments, thereby improving overall oral health outcomes and reducing long-term healthcare expenditures associated with untreated periodontal diseases. By fostering a supportive environment that prioritizes affordability and accessibility in periodontal care, Japan can enhance oral health equity and well-being for its population.

Key Market Trends

Increasing Dental Tourism

Japan's emergence as a popular destination for dental tourism contributes to the

expansion of the Periodontal Treatment Market. The country's reputation for high-quality dental care, advanced technology, and skilled dental professionals attracts international patients seeking specialized periodontal treatments and dental procedures. Dental tourism facilitates access to cost-effective dental services, including periodontal surgeries, implant placements, and cosmetic dental treatments, for patients from overseas who may face higher treatment costs or limited availability of specialized dental care in their home countries. Collaborations between dental clinics, travel agencies, and hospitality services cater to the needs of international patients, offering tailored treatment packages that combine dental procedures with cultural experiences and travel accommodations. The influx of dental tourists stimulates growth in the domestic dental sector, supports local economies, and enhances Japan's position as a leading destination for comprehensive periodontal care and dental tourism.

Rising Dental Insurance Coverage

Japan operates a universal health insurance system that provides coverage to all residents. This system offers insured individuals access to a comprehensive array of dental healthcare services, encompassing general restoration, oral surgery, and prescriptions, though it typically excludes many preventive procedures. Reimbursement under this system operates on a fee-for-service basis, guided by a standardized national tariff schedule that incorporates the costs of dental materials used in restorative treatments. Importantly, the out-of-pocket expenses for dental services in Japan are comparatively modest in relation to those found in other developed nations.

Increasing dental insurance coverage and reimbursement options bolster demand for periodontal treatments in Japan, facilitating affordability and accessibility for patients seeking dental care services. Comprehensive dental insurance plans provide financial assistance for preventive dental check-ups, periodontal examinations, and treatment procedures related to gum disease management. Expanded coverage for periodontal surgeries, scaling and root planing, and other periodontal therapies encourages regular dental visits and prompt intervention for gum disease symptoms. Insurance providers collaborate with dental clinics and healthcare facilities to streamline claims processing, reduce out-of-pocket expenses, and improve patient satisfaction with dental care services. By promoting equitable access to affordable periodontal treatments, enhanced dental insurance coverage contributes to maintaining oral health and addressing periodontal health needs across diverse demographic groups in Japan.

Segmental Insights

Therapy Insights

Based on the Therapy, non-surgical treatment methods currently dominate over surgical devices, reflecting a preference for conservative and minimally invasive approaches to manage periodontal diseases. Non-surgical treatments, such as scaling and root planing (SRP), are widely favored for their effectiveness in removing plaque and tartar from below the gumline, which is crucial for controlling bacterial infections and preventing disease progression. These procedures involve thorough cleaning of the tooth roots to promote gum reattachment and reduce pocket depths, thereby improving overall periodontal health.

One of the key reasons for the dominance of non-surgical treatments is their proven efficacy in treating early to moderate stages of periodontitis without the need for invasive surgical procedures. Dental professionals often recommend non-surgical methods as the first line of defense against gum diseases due to their ability to achieve significant clinical improvements with minimal discomfort and shorter recovery times compared to surgery. This approach aligns with patient preferences for treatments that preserve natural teeth and minimize procedural risks. Advancements in non-surgical periodontal therapies, such as the use of ultrasonic scalers and laser technology, have further enhanced treatment outcomes by improving precision, reducing treatment duration, and promoting faster healing. Ultrasonic scalers utilize high-frequency vibrations to remove calculus deposits and plaque efficiently, while lasers offer targeted therapy to eliminate bacteria and stimulate gum tissue regeneration.

End User Insights

Based on End User, hospitals and clinics significantly dominate over ambulatory surgical centers (ASCs), primarily due to the nature of periodontal care and patient preferences for comprehensive, ongoing treatment in established healthcare settings. Hospitals and clinics offer a wide range of periodontal services, from routine dental check-ups and non-surgical treatments to complex surgical interventions, catering to diverse patient needs across different stages of periodontal diseases.

Hospitals and clinics are preferred by patients seeking continuity of care and access to multidisciplinary healthcare professionals, including periodontists, general dentists, oral surgeons, and dental hygienists. These facilities provide a comprehensive spectrum of dental services under one roof, facilitating coordinated treatment plans and seamless referral pathways for specialized periodontal procedures. Patients benefit from integrated care environments that prioritize patient comfort, safety, and personalized

treatment approaches tailored to their oral health needs. Hospitals and clinics in Japan are equipped with state-of-the-art dental technologies, diagnostic imaging systems, and treatment modalities essential for delivering advanced periodontal care. From digital radiography and intraoral cameras to laser-assisted periodontal therapies and computer-aided treatment planning, these facilities leverage technological innovations to enhance diagnostic accuracy, treatment precision, and patient outcomes in periodontal management.

Regional Insights

Among the regions in Japan, Kanto, which includes Tokyo and its surrounding prefectures, emerges as a dominant force in the periodontal treatment market. Kanto, as the most populous and economically vibrant region in Japan, boasts a dense concentration of hospitals, clinics, and dental care facilities equipped to provide a wide range of periodontal services. Tokyo, the capital city located within the Kanto region, serves as a hub for advanced healthcare services, research institutions, and specialized dental practices, attracting a diverse population seeking high-quality dental care.

The dominance of Kanto in the periodontal treatment market is further reinforced by its extensive network of healthcare providers, including periodontists, oral surgeons, and general dentists trained in delivering comprehensive periodontal care. These professionals leverage state-of-the-art dental technologies, digital imaging systems, and innovative treatment modalities to diagnose and treat various periodontal conditions effectively. Kanto benefits from a robust infrastructure supporting dental education, research, and continuous professional development for dental professionals. Academic institutions and dental schools in Tokyo and neighboring prefectures contribute to the region's expertise in periodontal treatment, fostering collaboration between clinicians and researchers to advance clinical practices and treatment outcomes. The demographic profile of the Kanto region, characterized by a diverse population mix of urban residents, suburban communities, and surrounding prefectures, contributes to a steady demand for periodontal services. The region's economic prosperity, coupled with higher levels of healthcare expenditure and insurance coverage, enhances accessibility to specialized periodontal treatments for residents and visitors alike.

Key Market Players

Medtronic Japan Co., Ltd.

DENTSPLY Sirona K.K..

3M Japan Limited

Pfizer Japan Inc.

Novartis Pharma K.K.

Report Scope:

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

Japan Periodontal Treatment Market, By Therapy:

Non-surgical Treatment

Surgical Devices

Japan Periodontal Treatment Market, By End User:

Hospitals & Clinics

Ambulatory Surgical Centers

Others

Japan Periodontal Treatment 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 Periodontal Treatment Market.

Available Customizations:

Japan Periodontal Treatment 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

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

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