

Market Opportunity

Japan



HEALTHCARE
& MEDICAL
TECHNOLOGIES

OVERVIEW

- Japan's medical and healthcare technologies market is expected to continue to expand due to the need to improve medical treatment to keep pace with the needs of the world's most rapidly ageing population.
- Medical equipment currently accounts for a 75% of the market, excluding pharma.
- Potential for significant growth in elderly assistive technologies, mobile/wearable technologies and home healthcare technologies.

Top Business Opportunities for EU Companies

1.	Products, solutions and technologies related to elderly and nursing assistive care technologies and home healthcare
2.	Products and expertise in wearables and other mobile technologies for healthcare
3.	Technologies providing remote health and tele-medicine
4.	Advanced dental technologies, products and solutions
5.	Actively operating, manufacturing or developing medical and dental equipment and products; key existing markets will also include elderly and nursing assistive care technologies and home healthcare

Japan is the
world's 2nd
largest
market

for **Healthcare &
Medical**



Sector Characteristics

Medical Equipment

- Japan is strong in diagnostics, but also relies heavily on imports
- Government focus areas: imaging diagnosis and minimally invasive treatment

Elderly and Nursing Assistive Care Technologies, Home Healthcare

- Future growth areas in Robotics: nursing care/patient welfare robots, and communication robots for the elderly
- Shoes for the elderly is a promising growth area
- Electric powered beds currently have the biggest share in equipment, and disposable diapers have the biggest share in expendables

Dental Products

- Expansion forecasted on in-home treatment specialised technologies
- Continued and steady growth projected for dental CAD / CAM, CT and microscopes

Wearables/Mobile Technologies for Healthcare

- Significant growth expected for smart watches, healthcare bands and electronic medicine notebooks

Remote Health and Tele-medicine Technologies

- Deregulation expected to significantly increase remote insurance treatment

Nanotechnology for Healthcare

- Considered an early technology with high expectations but limited applications, opportunities exist for early-arrivals to establish presence in the market
- Scope for this sub-sector includes structural analysis technology at the molecular level of biomolecules, nano drug delivery system, gene therapy technology, etc



MARKET OPPORTUNITY

Japan

Drivers

- Super ageing population
- National healthcare system that generally supports higher-than-average reimbursement
- New technologies enabling new treatments and approaches

Barriers

- Increasing pricing restrictions
- Strict approval process (high quality standards)
- Presence of entrenched players in some mature markets

Name	Subsector Definition	Market Size (M €)		Trend, Needs	Main Players
		Current (2015)	Future (2020)		
Medical equipment	Diagnostic medical equipment, therapeutic medical equipment, household medical equipment	18,991	21,278	Continued steady growth to satisfy advanced diagnostic and therapeutic needs	
Elderly and nursing assistive care technologies, home healthcare	Equipment, tools and supplies used for nursing care, rehabilitation, care prevention, independence support, etc.	3,381	4,081	Demand for nursing care equipment, utensils and supplies increases due to the aging of the public and the high turnover rate of nursing care staff Government support for nursing robots	
Dental products	Dental machinery, Preventive dental related products, Dental materials, Dental chemicals, Dental implants	2,161	2,169	Reduction of dental medical expenses due to prevention, early diagnosis, short-term hospital flow Increase in dental illness of elderly	
Wearable / mobile technologies for healthcare	Healthcare-related equipment aiming for high function / high added value by utilizing ICT technology	689	1,806	Monitoring and wearable device needs have been growing primarily due to 3 trends such as (i) health consciousness due to Olympics and cognition of lifestyle diseases; (ii) early diagnosis and emphasis on prevention for reduction of medical expenses (iii), need for advanced treatment	
Remote health and telemedicine technologies	Remote insurance treatment, Remote treatment without insurance (by medical institution) Remote medical service, Remote health consultation service (by private enterprise)	52	154	Remote medical care needs in the community-based or at home are increasing from hospital-centered medical care (expected completion by 2025)	
Nanotechnology for healthcare	Nano material in biotechnology field	84	125	There is great expectation for minimally invasive diagnosis and target treatment system which was impossible without nanotechnology	—

