

Hospital Equipments/Machineries Market in Japan: Key Research Findings 2014

◆ Research Outline

Yano Research Institute has conducted a study on the hospital equipments and machineries market with the following conditions:

1. Research period: December 2013 to March 2014
2. Research target: Hospitals, clinics, manufacturers of systems and related devices for pharmacies, partner companies and dealers of such manufacturers
3. Research methodologies: Face-to-face interviews by the specialized researchers, survey via telephone/e-mail and literature research

What are Hospital Equipments/Machineries?

The hospital equipments/machineries in this research indicate the following equipments: Hospital management systems (ordering systems, electronic medical records, etc.) central sterile supply department machineries (cleaning equipments, sterilizers, etc.) operation room equipments (operating tables, surgical lights, etc.) medicine management devices (drug dividing and packaging machines, drug package printing systems, etc.) and other facilities for hospital wards (automatic re-visitor reception machines and automatic payment machines, etc.)

◆ Key Findings

■ Prospects of Hospital Equipments/Machineries Market in FY2013 Increases by 2.0% on Y-o-Y Basis to Attain 104.725 Billion Yen

The domestic hospital equipments/machineries market in FY2012 rose by 7.6% to attain 102.664 billion yen (based on shipment value from the sellers). The market in FY2013 can expect a growth by 2.0% to reach 104.725 billion yen, based on the shipment value from the sellers, due to a series of renovations and constructions of large facilities including university hospitals and base hospitals. Since there are plans in some of the hospitals to equip with medical machineries more sufficiently in order for them to be acceptable for emergency and advanced medical care whenever possible, the market of hospital equipments and machineries, especially for operating rooms and devices for medicine management, are expanding.

■ Favorable Performance Seen in Operating Room Equipments and Machineries, Medicine-Management Devices, and Hospital Wards Facilities

The details of the domestic hospital equipments/machineries market in FY2013 shows that the equipments and machineries for operating rooms, devices for medicine management, and facilities for hospital wards are anticipated to attain favorable performance.

Although number of hospitals is declining, number of cases of operations, surgeries and general

anesthesia performed at a hospital is increasing. Therefore, more hospitals are required to perform construction works to expand or renovate the hospital building, especially the operation rooms in which the newly adopted or renewed machineries should fit satisfactorily. This tendency increased the sales of operation-room equipments and machineries. As for growth of medicine-management devices, there are factors such as increase of pharmacists who works at home, and of pharmacies additionally introduce drug dividing and packaging machines in order to cope with expanding generic drugs. Lastly, growing sales of automatic payment machines, one of the machines for hospital wards, is because of free-of-charge issuance of detailed medical examination report has become mandatory.

◆ **Report format:**

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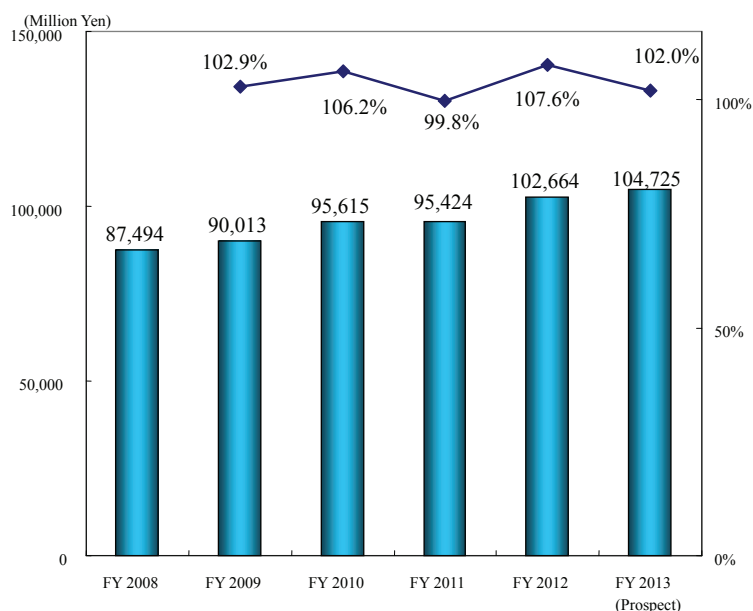
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■ **Figure 1: Transition of Size of Hospital Equipments/Machineries Market**



Notes:

1. The figures are based on shipment value from the sellers.
2. The hospital equipments/machineries in this research indicate the following equipments: Hospital management systems (ordering systems, electronic medical records, etc.), central sterile supply department machineries (cleaning equipments, sterilizers, etc.), operation room equipments (operating tables, surgical lights, etc.), medicine management devices (drug dividing and packaging machines, drug package printing systems, etc.) and other facilities for hospitals wards (automatic re-visitor reception machines and automatic payment machines, etc.)