

# JAPAN

<b>Land area</b>	377,972 sq km
<b>Population</b>	126 million — 105th most populous nation
<b>GDP</b>	\$5.2 Trillion
<b>Main Industries</b>	Automotive, electronics/semiconductor, and chemical industries, advanced manufacturing infrastructure

Japan is well regarded for scientific and technological innovation, making it a key market for analytical instrumentation. Japan has the third largest economy in the world with a GDP of \$5.2 trillion, only surpassed by the United States and China. The government under Prime Minister Shinzo Abe has pushed several economic policies and reforms, collectively known as “Abenomics,” with aims to strengthen and improve the Japanese economy. Despite a government push for generic drugs, the majority of pharmaceutical users reported brand drugs as the main type of drug produced.

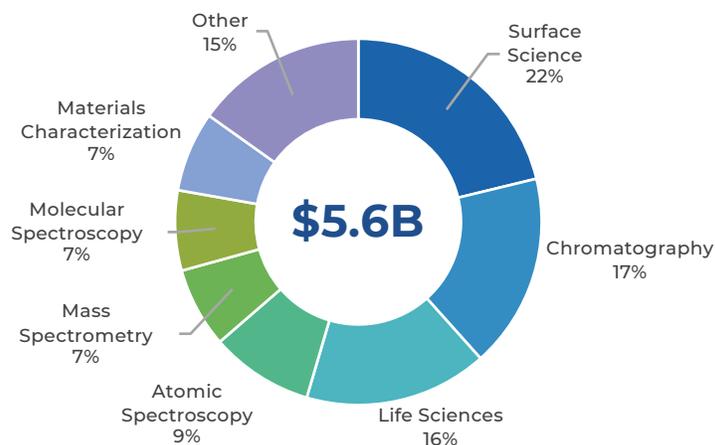
## Overall

- The analytical instrumentation market in Japan was **\$5.6 billion in 2017**.
- The market will grow at **3.1%** over the next five years to reach **\$6.5 billion in 2022**, driven mainly by surface science, atomic spectroscopy, and mass spectrometry technologies.

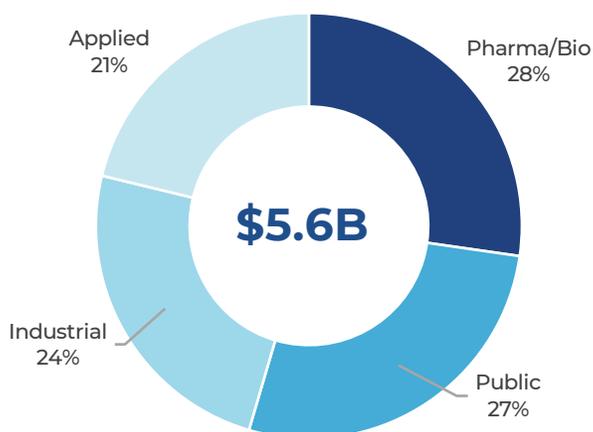
## Techniques

- Surface science and chromatography have the largest shares of the lab instrument market in Japan.
- The analytical instrumentation market is well established in the country and most technology areas will see growth rates that are close to average.
- Mass spectrometry and atomic spectroscopy are expected to see the fastest growth rates.

OVERALL DEMAND BY TECHNIQUE , 2017



OVERALL DEMAND BY SECTOR , 2017



## Sectors

- The pharma/bio and public sectors have the largest shares of the market, but the fastest growth will come from the industrial sector, driven by advanced electronics and semiconductor manufacturing.
- Academia and pharmaceutical industries spend more on R&D than other neighboring countries, except China.
- The rapid development of technologies like autonomous vehicles and artificial intelligence will rely on the robust semiconductor and electronics industries in Japan, though the country will face stiff competition from China and other Asia Pacific countries.