

Market insights summary

Japan dialysis access treatment device market

What's trending and new

Revenue declines due to market maturity are partially being offset by the adoption of high-priced maintenance technologies

- Japan's dialysis patient population continues to decline due to higher mortality among the aging end-stage renal disease (ESRD) population and improved chronic kidney disease (CKD) management leading to lower procedure volumes and decline in the market value over the forecast period by 2035.
- Growth in the maintenance segment is sustained by continued adoption of premium-priced technologies such as drug-coated balloons (DCBs) and covered stents.
- Physicians highlighted the importance of clinical evidence and reimbursement in supporting adoption of advanced maintenance devices.

Emerging AVF creation technologies are increasing competitive pressure

- There is growing interest in percutaneous arteriovenous fistula (AVF) creation technologies and potential increasing competition from platforms such as Ellipsys Medical's Ellipsys and BD's WavelinQ.

Access more insights and data in the [report](#).
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2025 Japanese dialysis access treatment device market snapshot

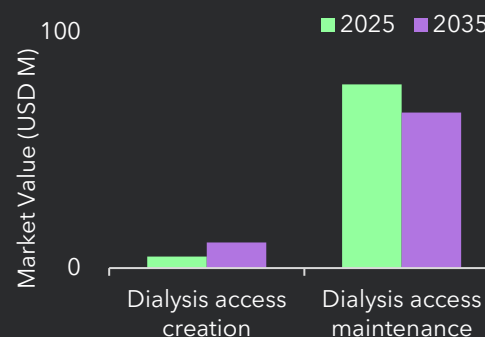
\$82.7 M

Market value

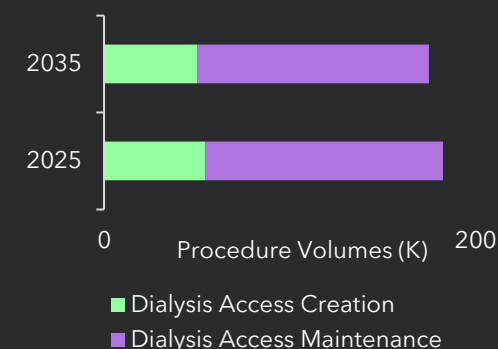
-1.8%

CAGR ('19-'35)

Japanese dialysis access treatment device market by scope



2025 Japanese dialysis access treatment procedures by scope



Competitor insights

- BD leads the Japanese market due to its comprehensive portfolio spanning both access creation and maintenance devices.
- Boston Scientific leverages a strong maintenance device portfolio; however, the lack of a dedicated DCB offering may increase competitive pressure as DCB adoption grows.
- Terumo benefited from its domestic presence in Japan, direct facility relationships, and physician preference for local support and product availability.

2025 Japanese dialysis access treatment device competitive landscape

