

# **Asia-Pacific Peritoneal Dialysis Market - A Regional Analysis: Focus on Modality, Product, Indication, End User, and Country-Level Analysis - Analysis and Forecast, 2025-2035**

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## **Abstracts**

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This report will be delivered in 7-10 working days. Peritoneal dialysis is a method used to remove waste products from the blood, and it plays a crucial role in treating patients with kidney failure. When the kidneys can no longer filter waste efficiently, peritoneal dialysis helps by introducing a cleansing solution into the abdominal cavity, where the peritoneum acts as a natural filter. After a specified dwell time, the fluid, now containing waste, is drained and discarded. Unlike hemodialysis, peritoneal dialysis offers the flexibility for patients or caregivers to manage the treatment independently, making it possible to perform the procedure at home, work, or while traveling.

The increasing prevalence of chronic kidney disease, shifting preference toward home base treatment, increasing government support and healthcare reforms are some of the major factors driving the market peritoneal dialysis market in Asia Pacific. In India, approximately 210,000 new CKD cases are diagnosed each year. As per the article published by the National Institute of Health in 2022, around 8,500 people were receiving peritoneal dialysis in India in 2018.

Moreover, many countries in the Asia-Pacific region are implementing healthcare reforms to improve access to dialysis treatment and provide support for patients with chronic kidney disease (CKD). These reforms include subsidies for dialysis treatments, the expansion of healthcare infrastructure, and the promotion of home dialysis options such as peritoneal dialysis. For example, the Australian government offers subsidies for

peritoneal dialysis treatments under the Medicare system, which has led to increased adoption of this treatment method in the country. For home dialysis patients, including those on peritoneal dialysis, there is a capitation payment to the patient's specialist renal service. Recent data indicates this payment is approximately AUD 56,649 (around \$36,646) per patient per year, covering various expenses related to home dialysis management.

In addition, peritoneal dialysis is often considered more cost-effective than in-center hemodialysis, especially in countries with limited healthcare resources. The cost savings arise from the reduced need for hospital visits, transportation, and medical staff involvement in the treatment process. This makes peritoneal dialysis an attractive option in developing countries. A study in Taiwan found that the average lifetime healthcare costs were higher for hemodialysis (\$237,795) than for peritoneal dialysis (\$204,442). The cost-effectiveness ratios for peritoneal dialysis and hemodialysis therapy were \$13,681 and \$16,643 per quality-adjusted life year (QALY), respectively, indicating savings of nearly \$3,000 per QALY for peritoneal dialysis compared with hemodialysis.

However, the risk of infection and complications associated with peritoneal dialysis is expected to hinder the market growth. Peritoneal dialysis requires the insertion of a catheter into the abdominal cavity, and if not managed properly, it can lead to serious complications, such as infections (peritonitis) or catheter malfunction. This presents a barrier for patients and healthcare providers, particularly in regions where access to healthcare facilities and trained professionals is limited. Also, the limited availability of trained nephrologists, dialysis nurses, and other healthcare professionals who can provide the necessary education and support for peritoneal dialysis patients is expected to limit the adoption, thereby negatively impacting the market growth.

Market players are actively working to expand their presence in the peritoneal dialysis market by focusing on product development, expanding distribution networks, providing training and support, and improving access to treatment. For instance, in March 2024, Mitra Industries announced the introduction of its triple-chambered peritoneal dialysis bag, designed with a near-neutral pH and low glucose degradation products (GDPs). This new development aims to support nephrologists in providing improved patient care and achieving better treatment outcomes.

Key players in the market are Baxter International, Inc. Fresenius Medical Care AG, B. Braun SE, Medtronic Plc., etc.

#### Market Segmentation:

### Segmentation 1: by Modality

Automated Peritoneal Dialysis

Continuous Ambulatory Peritoneal Dialysis

### Segmentation 2: by Product

Peritoneal Dialysis Solution Bags

Peritoneal Dialysis Machine

Dialysis Accessories and Other products

### Segmentation 3: by Indication

Acute Kidney Injury

End-Stage Renal Diseases

Others

### Segmentation 4: by End User

Hospitals and Dialysis Centers

Homecare

Others

### Segmentation 5: by Country

China

Japan

Australia

India

South Korea

Rest of Asia Pacific

### China to Lead the Asia-Pacific Peritoneal Dialysis Market (by Country)

The country has been making significant advancements in dialysis treatment due to its large population and increasing prevalence of chronic kidney disease (CKD). The Chinese government has been actively investing in healthcare reforms to improve access to dialysis treatments, including peritoneal dialysis. In 2020, China rolled out the National Dialysis Project, which aimed to expand access to dialysis treatments, especially peritoneal dialysis, across rural areas. This has greatly contributed to the rising number of peritoneal dialysis patients. According to the National Health Commission of China, more than 500,000 people in China were undergoing dialysis in 2020, with a substantial portion opting for peritoneal dialysis due to its convenience and affordability. Moreover, Chinese companies, such as Fresenius Medical Care, have been expanding their peritoneal dialysis offerings within the country. In 2022, Fresenius Medical Care announced its plan to significantly increase its production of peritoneal dialysis solutions in China, in response to growing demand from patients requiring kidney replacement therapy.

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