

Peritoneal Dialysis Market - Global Outlook & Forecast 2020-2025

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global Peritoneal Dialysis Market Report

The peritoneal dialysis market by revenue is expected to grow at a CAGR of over 6% during the period 2019–2025.

The global peritoneal dialysis (PD) market is expected to grow with an absolute growth of over 44% during the forecast period. The market is growing due to the growing elderly population that increases the risk of kidney diseases and the high adoption of several dialysis treatment options, especially PD. Moreover, diabetes is one of the largest factors that increases the risk of kidney diseases. There is increasing diabetes prevalence in the elderly population in developed countries due to changing lifestyles, which is increasing the risk of renal failures. Over 34 million people in the US have diabetes of which 30% of patients are with Type 1 diabetes and 10–40% Type 2, which eventually are susceptible to kidney failures. This increasing prevalence is boosting the market for peritoneal dialysis. Furthermore, the increasing prevalence of chronic and acute kidney failures in the elderly population and the increasing demand for home PD treatment and automated PD are expected to increase the traction of the PD market across the globe.

The following factors are likely to contribute to the growth of the peritoneal dialysis market during the forecast period:

Rise in Demand for Home Peritoneal Dialysis Treatment

Automated Peritoneal Dialysis expecting to Gain Traction in Upcoming Years

Emergence of On-demand Peritoneal Dialysis

The study considers the present scenario of the peritoneal dialysis market and its market dynamics for the period 2019–2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspect of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Global Peritoneal Dialysis Market Segmentation

The global peritoneal dialysis market research report includes a detailed segmentation by products, technology, diseases, end-users, and geography. The global PD solution segment is expected to grow at a CAGR of over 6% during the period 2019–2025. The growing interest to manufacture new solutions with high biocompatible features is a major contributor to the market growth. The development of neutral pH, low or ultralow GDP solutions, glucose-sparing PD solutions, alternative osmotic agents (such as hyperbranched polyglycerol), and low-sodium PD solutions is driving the segment. North America is expected to observe an incremental growth of close to \$900 million by 2025. The region is witnessing a high usage of PD solutions on account of high renal disease prevalence that is increasing the demand for dialysis, especially peritoneal dialysis.

In 2019, the continuous ambulatory peritoneal dialysis (CAPD) segment accounted for over 66% share in the global peritoneal dialysis market. There is an increase in the patient population globally that is boosting PD adoption and is contributing to the CAPD segment growth. Also, the availability of various machines by major and other prominent vendors for CAPD globally is expected to boost the market growth in upcoming years. North America was the major revenue contributor to both CAPD and APD technology segments. However, the APAC region is likely to witness the fast growth rate during the forecast period. Vendors are offering several technologically advanced CAPD products, which is boosting the market demand and contributing to the overall market growth.

In 2019, the chronic kidney failure (CKF) segment grew at a significant rate, and the trend is likely to continue during the forecast period. The global all-age mortality rate from CKF increased by 41.5% between 1990 and 2017, although there was no significant change in the age-standardized mortality rate. The increasing CKF disease prevalence worldwide is driving the adoption of PD treatment in the patient population

that is boosting the market growth. Moreover, the increasing patient population of hypertension and diabetes is driving the prevalence of CKF globally. This has increased the PD adoption in the patient population and is boosting the market demand for PD products.

The home healthcare settings segment is growing due to the increasing patient population, especially the elderly. As the elderly population is at a higher risk of kidney diseases, there is rising usage of home healthcare settings in the segment. Also, the PD treatment can easily obtain at home as no needle is involved in this process that increases the usage of PD at home healthcare settings, thereby boosting its market growth. The increasing elderly population is leading to chronic disease prevalence, which is expected to boost the peritoneal dialysis market.

Segmentation by Products

PD Solution

PD Sets

PD Machines

PD Catheters

Others

Segmentation by Technology

CAPD

APD

Segmentation by Disease

Chronic Kidney Failure (CKF)

Acute Kidney Failure (AKF)

Segmentation by End-users

Home Healthcare Settings

Hospitals

Dialysis Centers

Nursing Homes

INSIGHTS BY GEOGRAPHY

North America represented the largest regional segment of the market in 2019. The increasing healthcare expenditure in the US and Canada, the growing prevalence of kidney diseases, the growing geriatric population, and the rising incidence of chronic diseases are the factors contributing to the high share of the region. The U.S. dialysis market size is expected to grow on account of the growing end-stage renal diseases in the region. In 2018, there were around 58,027,427 individuals aged 65 years and above in North America. This high number in the region has increased the prevalence of chronic diseases such as CVD, diabetes, obesity, and other ailments. The increasing diabetes patient population in the region is one of the major factors that is increasing the kidney failure incidence, thereby increasing the adoption of PD.

Segmentation by Geography

North America

US

Canada

Europe

UK

Germany

France

Italy

Spain

APAC

China

Japan

South Korea

Australia

India

Latin America

Brazil

Mexico

Argentina

Middle East & Africa

South Africa

Saudi Arabia

Turkey

INSIGHTS BY VENDORS

The competitive scenario in the global peritoneal dialysis market is currently intensifying due to the rapidly changing technological environment. This could have a significant impact on vendors as customers expect continual innovations and upgrades, for better

decontamination process. Baxter International, Fresenius Medical Care, Medionics, and Medtronic are the major vendors in the market. All these companies have a significant presence in major geographical regions such as North America, APAC, and Europe. However, there are many local vendors providing products with similar specifications at lower prices, which has resulted in a price war among vendors. The major vendors are continuously competing among themselves for the leading position in the market, with occasional spurts of competition coming from other local vendors.

Prominent Vendors

Baxter International

Fresenius Medical Care

Medionics

Medtronic

Other Prominent Vendors

Cook Medical

Amecath Medical Technologies

CardioMed Supplies

Merit Medical Systems

MITRA INDUSTRIES

Angioplast

Lifeline Services

Health Line International

Newsol Technologies

Poly Medicure

Terumo

Utah Medical Products

Medcomp

Renax Biomedical Tech

KEY QUESTIONS ANSWERED

1. What is the peritoneal dialysis market size and growth rate during the forecast period?
2. What are the factors impacting the growth of the peritoneal dialysis market share?
3. How is the growth of home healthcare settings segment influencing the peritoneal dialysis market growth?
4. Who are the leading vendors in the peritoneal dialysis market, and what are their market shares?
5. What is the impact of the COVID-19 pandemic on the peritoneal dialysis market share?

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