

Global Kidney Preservation Market Size Study and Forecast by Preservation Solution Solution, By Technique (Static Cold Storage, Hypothermic Machine Perfusion, Normothermic Machine Perfusion), By Donor Type, By End Use, and Regional Forecasts 2026-2036

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Abstracts

Global Kidney Preservation Market Definition and Scope

The global kidney preservation market valued at USD 0.07 billion in 2025 is anticipated to reach USD 0.14 billion by 2036, growing at 7.1% CAGR during the forecast period. The market has shifted from a niche transplant support segment to a strategically important component of organ transplantation infrastructure. The increasing prevalence of chronic kidney disease, rising end stage renal disease cases, and growing demand for organ transplantation have enhanced the importance of preservation technologies. Healthcare systems are increasingly focusing on improving graft survival rates and reducing organ wastage. Preservation solutions have evolved beyond conventional cold storage protocols, allowing transplant teams to extend organ viability and improve clinical outcomes. Machine perfusion technologies have garnered significant attention owing to their ability to assess organ quality prior to transplantation. The expanding use of expanded criteria donors and donation after circulatory death organs has enhanced the need for advanced preservation techniques.

Global Kidney Preservation Market: Key Highlights

The Global Kidney Preservation Market was valued at USD 0.07 billion in 2025, primarily driven by increasing demand for effective organ preservation in kidney

transplantation procedures.

The market is projected to reach USD 0.14 billion by 2036, growing at a CAGR of 7.1% during 2026–2036, propelled by advancements in organ preservation technologies and perfusion systems.

North America leads the global market, supported by advanced transplant healthcare infrastructure and well-established organ donation and transplantation programs.

Asia Pacific is the fastest-growing regional market, propelled by expanding transplant capabilities and increasing investments in specialized healthcare infrastructure.

University of Wisconsin Solution dominates the preservation solution segment because of its proven effectiveness in minimizing ischemic injury and extending kidney preservation time.

Static Cold Storage leads the technique segment owing to its clinical reliability, cost-effectiveness, and widespread adoption across transplant centers globally.

Normothermic Machine Perfusion represents the fastest-growing technique, supported by its ability to improve organ viability assessment and enhance post-transplant outcomes.

Transplant Centers/Hospitals represent the leading end-user segment because of their specialized surgical expertise and comprehensive infrastructure for organ preservation and transplantation procedures.

Research Scope and Methodology

The study investigates the global kidney preservation market, segmenting it by preservation solutions, preservation techniques, donor types, and end-use environments. The assessment covers transplantation applications, organ storage technologies, procurement processes, and post-preservation clinical outcomes. The report delves into commercial adoption trends, technology penetration levels, reimbursement scenarios, the regulatory landscape, investment trends, and competitive positioning. Key ecosystem players include preservation solution manufacturers,

machine perfusion technology vendors, transplant facilities, hospitals, organ procurement organizations, logistics providers, and regulatory bodies.

The research methodology incorporates primary interviews with transplant surgeons, nephrologists, procurement specialists, hospital administrators, and preservation technology manufacturers. Secondary research encompasses scientific journals, transplant registries, healthcare databases, government publications, regulatory filings, and industry association reports.

Market estimation employs a combination of top-down and bottom-up analytical approaches. Revenue mapping analyzes sales of preservation solutions, machine perfusion deployments, transplant procedure volumes, and regional healthcare expenditures. Demand assessment considers trends in donor availability, transplantation rates, and adoption of advanced preservation protocols.

Data triangulation validates findings by cross-verifying them among multiple datasets and stakeholder interviews. Competitive benchmarking evaluates technology capabilities, pricing strategies, clinical performance, and commercialization pathways. Forecast models encompass demographic trends, transplant waiting list growth, healthcare infrastructure investments, donor pool developments, and technological innovation trajectories to offer reliable market projections through 2036.

The research methodology combines primary interviews with transplant surgeons, nephrologists, procurement specialists, hospital administrators, and preservation technology manufacturers. Secondary research includes scientific journals, transplant registries, healthcare databases, government publications, regulatory filings, and industry association reports.

Market sizing leverages both top-down and bottom-up analytical methodologies. Revenue analysis examines sales of preservation solutions, deployment of machine perfusion techniques, volume of transplant procedures, and healthcare expenditure across regions. Demand analysis investigates trends in donor availability, transplantation rates, and utilization of advanced preservation protocols. Data triangulation cross-validates findings across multiple datasets and stakeholder interviews. Competitive analysis evaluates technology capabilities, pricing strategies, clinical performance, and commercialization pathways. Forecasting models incorporate demographic trends, growth of the transplant waiting list, investments in healthcare infrastructure, evolution of the donor pool, and technological innovation pathways to generate robust market estimates through 2036.

Key Market Segments

By Preservation Solution:

University of Wisconsin

Histidin-Tryptophan-Ketoglutarat (HTK) Solution

Celsior Solution

Hypertonic Citrate Adenine (HC-A) Solution

Institute Georges Lopez (IGL-1) Solution

Others

By Technique:

Static Cold Storage

Hypothermic Machine Perfusion

Normothermic Machine Perfusion

By Donor Type:

Standard Criteria Donor (SCD)

Expanded Criteria Donor (ECD)

Donation after Brain Death (DBD)

Donation after Circulatory Death (DCD)

Living Donor

By End Use:

Transplant Centers / Hospitals

Organ Procurement Organizations (OPOs)

Others

Key Market Players

Sartorius AG

Paragonix Technologies, Inc.

Bridge to Life Ltd.

Organ Recovery Systems, Inc.

Institute Georges Lopez (IGL) Group

TransMedics Group, Inc.

Preservation Solutions, Inc.

Waters Medical Systems LLC

OrganOx Ltd.

XVIVO Perfusion AB

Industry Trends

The kidney preservation market is now entering a phase of clinical optimization, technology integration, and donor pool expansion. As transplant waiting lists continue to grow globally, healthcare systems are increasingly prioritizing the efficiency of organ utilization.

Machine perfusion technologies represent one of the largest industry shifts. Transplant centers are increasingly adopting hypothermic and normothermic perfusion systems to improve organ assessment capabilities. These technologies decrease discard rates and allow for the transplantation of higher-risk donor kidneys.

The donor landscape continues to evolve. Expanded criteria donor and donation after circulatory death kidneys account for an increasing proportion of transplant activity. Such trend is creating a demand for advanced preservation approaches that can reduce ischemic injury and enhance graft function.

The integration of artificial intelligence is emerging within perfusion monitoring systems. Real-time analysis of organ biomarkers allows more accurate viability assessments. Technology providers are increasingly investing in predictive analytics platforms to support clinical decision making.

Healthcare authorities continue to promote awareness campaigns on organ donation. As of 2024, over 100,000 people are still on organ transplant waiting lists, according to the United States Health Resources and Services Administration. Persistent supply-demand imbalances highlight the strategic importance of preservation technologies.

Cross-border organ transportation networks are on the rise. Preservation solution makers are increasingly focused on extending storage times. Greater transportation flexibility allows for larger scale organ sharing programs and regional transplant collaboration.

Regulatory agencies continue to champion innovation. Initiatives such as fast-track approval pathways for transplantation technologies help advance preservation systems to market. Clinical evidence is increasingly showing better graft outcomes with machine perfusion approaches.

The investment climate remains strong. Venture capital firms and strategic healthcare investors continue to fund preservation technology companies. Perfusion platforms, biomarker monitoring tools and next-generation preservation fluids are of commercial interest.

Sustainability considerations are slowly impacting procurement and logistics operations. Digital tracking systems increase supply chain transparency and

decrease transportation inefficiencies. Increasingly, hospitals adopt integrated preservation management platforms to streamline workflow coordination.

Personalized transplantation strategies are gaining ground. Donor traits, recipient profiles and organ-specific risk factors are increasingly factored into preservation protocols. This will allow for a greater application of precision medicine principles in transplantation workflows.

Over the next decade, we expect a wider commercialization of normothermic preservation systems, biomarker-driven viability assessment platforms and integrated digital transplant ecosystems. Competitive differentiation will increasingly be based on clinical outcome improvements rather than only on preservation duration.

Market Determinants

Rising Burden of Chronic Kidney Disease: Growing incidence of chronic kidney disease continues expanding transplant demand. Larger patient populations require kidney replacement therapies, increasing procedural volumes and preservation technology utilization.

Expansion of Donor Pool Strategies: Healthcare systems increasingly utilize expanded criteria donor and circulatory death donor organs. Advanced preservation technologies enable transplantation of organs previously considered unsuitable.

Technological Advancement in Perfusion Systems: Machine perfusion technologies improve graft viability assessment and reduce ischemic damage. These benefits support clinical adoption and strengthen commercial demand.

Government Support for Organ Donation Programs: Public awareness campaigns, transplant registries, and donor enrollment initiatives increase organ availability. Higher procurement activity directly stimulates preservation market growth.

High Technology Costs: Machine perfusion systems require substantial capital investment. Budget limitations across developing healthcare systems may restrict adoption rates.

Regulatory and Clinical Validation Requirements: Preservation technologies must demonstrate long-term clinical efficacy and safety. Lengthy approval timelines can delay commercialization and increase development costs.

Opportunity Mapping Based on Market Trends

Expansion of Normothermic Preservation Technologies: Growing clinical acceptance creates investment opportunities for device manufacturers developing next-generation perfusion platforms and monitoring systems.

Utilization of Marginal Donor Organs: Increasing use of expanded criteria donor kidneys creates demand for specialized preservation protocols and viability assessment solutions.

Emerging Market Transplant Infrastructure Development: Asia Pacific, Latin America, and Middle Eastern countries continue expanding transplant capabilities. Infrastructure investments support significant future demand growth.

Digital Transplant Ecosystem Integration: Software platforms integrating organ tracking, preservation monitoring, and clinical decision support offer attractive commercialization opportunities.

Value-Creating Segments and Growth Pockets

University of Wisconsin solution leads preservation solutions through decades of clinical validation and transplant center adoption.

By Preservation Solution, the market is segmented into University of Wisconsin, Histidin-Tryptophan-Ketoglutarat (HTK) Solution, Celsior Solution, Hypertonic Citrate Adenine (HC-A) Solution, Institute Georges Lopez (IGL-1) Solution, and Others. University of Wisconsin Solution University of Wisconsin solution is currently the market leader with a share of 46.7% in 2025. The current leadership position is attributed to wide clinical validation, broad regulatory acceptance, established procurement protocols, strong physician confidence, and broad compatibility across donor categories. Commercial deployment remains strongest in major transplant centers owing to decades of successful clinical utilization. Institute Georges Lopez (IGL-1) Solution Institute Georges

Lopez (IGL-1) Solution is expected to register the fastest CAGR of 14.8% during 2026–2036. Future growth is supported by superior endothelial protection characteristics, increasing clinical adoption across Europe, expanding evidence supporting graft preservation, and investment momentum favoring next-generation preservation fluids..

Static cold storage maintains technique leadership through clinical simplicity and global transplant infrastructure compatibility.

By Technique, the market is segmented into Static Cold Storage, Hypothermic Machine Perfusion, and Normothermic Machine Perfusion. Static Cold Storage currently leads the market with an estimated share of 61.3% in 2025. The current lead is attributed to ease of operation, lower acquisition costs, well-established clinical familiarity, widespread availability of infrastructure and proven performance for transplant programs across the globe.

Normothermic Machine Perfusion is expected to register the fastest CAGR of 18.9% during 2026-2036. The future growth is supported by real-time organ assessment capabilities, reduction of ischemic injury, increasing utilization of marginal donor kidneys, strong clinical evidence generation, and growing investment in transplantation innovation.

Donation after brain death dominates donor type segment through established procurement systems and consistent organ quality.

By Donor Type, the market is segmented into Standard Criteria Donor, Expanded Criteria Donor, Donation after Brain Death, Donation after Circulatory Death, and Living Donor. Donation after Brain Death holds the largest market share, expected to be 43.5% in 2025, due to well-established procurement systems, reliable organ quality, regulatory backing, increased transplantation volumes, and acceptance among transplant programs.

Donation after Circulatory Death is anticipated to grow at the fastest CAGR of 16.7% between 2026 and 2036, driven by efforts to overcome donor shortages, positive policy shifts, enhanced preservation technologies, growing confidence among transplant centers, and expanding procurement infrastructure.

Transplant centers and hospitals lead end-use adoption through specialized expertise and integrated organ preservation workflows.

By End Use, the market is segmented into Transplant Centers/Hospitals, Organ Procurement Organizations, and Others. Currently, Transplant Centers/Hospitals dominate the market with an estimated 68.4% share in 2025. Current leadership stems from direct procedural responsibility, concentrated preservation technology deployment, specialized clinical expertise, integrated transplantation workflows, and significant healthcare spending capacity.

Organ Procurement Organizations are expected to register the fastest CAGR of 15.3% during 2026–2036. Future growth is supported by expanding organ recovery responsibilities, increased technology investments, operational modernization initiatives, and stronger regulatory emphasis on organ utilization efficiency.

Regional Market Assessment

North America leads the kidney preservation market through advanced transplantation infrastructure and machine perfusion adoption.

North America is expected to hold a significant share of the global kidney preservation market, estimated at 38.6% in 2025. This regional dominance is attributed to a strong transplantation infrastructure, high healthcare spending, extensive donor registry systems, and the widespread adoption of machine perfusion technologies. The United States continues to be the largest revenue generator, driven by a high rate of transplant operations and ongoing investments in modernizing organ procurement. Regulatory bodies are facilitating innovation in preservation through simplified clinical evaluation pathways. Healthcare providers are increasingly adopting advanced preservation solutions to enhance graft outcomes and lower organ discard rates. Active academic research and collaboration between transplant centers and technology developers are furthering commercialization prospects. Long-term market growth is anticipated to be fueled by sustained transplant demand and continuous technological advancements.

Europe strengthens kidney preservation leadership through mature transplant networks and innovation in preservation technologies.

Europe accounts for a significant share of the kidney preservation market due to its well-established transplantation systems and stringent regulatory environments. Countries such as Germany, France, Spain, and the United Kingdom continue to invest in donor management programs and advanced preservation technologies. Cross-border organ sharing programs are driving the demand for preservation solutions across regional

transplant networks. Academic institutions are actively involved in the clinical validation of next-generation preservation methods. Healthcare systems are increasingly using expanded criteria donor organs, thereby creating the demand for advanced perfusion technologies. Regulatory harmonization across European markets is facilitating wider technology adoption and commercial expansion. Continuous innovation in preservation fluids and organ viability assessment tools is strengthening the future market outlook.

Asia Pacific accelerates kidney preservation growth through expanding transplant infrastructure and rising healthcare investments.

Asia Pacific is expected to register the fastest CAGR of 15.8% during 2026–2036. The growth acceleration is driven by expanding healthcare infrastructure, increasing prevalence of chronic kidney disease, rising awareness of transplantation and increasing government investments in organ donation programs. Countries such as China, India, Japan, South Korea, and Australia continue to enhance capabilities for transplantation. Rapid urbanization and improving access to healthcare support procedural growth. Technology manufacturers increasingly target the region through partnerships and localized commercialization strategies. Regulatory reforms geared at improving efficiency of transplantation further support the development of the market. Investment momentum is shifting more towards advanced preservation technologies as healthcare systems strive for better clinical outcomes.

LAMEA expands kidney preservation opportunities through healthcare modernization and growing transplantation capacity.

LAMEA The LAMEA market is growing steadily with the gradual expansion of the transplantation infrastructure and healthcare modernization initiatives. Middle Eastern countries are investing heavily in specialized transplant centers and organ donation awareness programs. Latin American countries continue to strengthen procurement networks and improve access to transplantation services. Government healthcare reforms are supporting the adoption of modern preservation technologies. Collaboration with international transplant organizations is increasing, helping to transfer knowledge and build clinical capabilities. Infrastructure gaps in some countries will be remedied with increased healthcare investment and development of donor programs, paving the way for long-term growth in the market. Commercial opportunities will come from adding to transplant capacity and modernizing organ preservation practices.

Recent Developments

March 2025: OrganOx announced expanded deployment of normothermic perfusion technology across major transplant institutions. The development strengthens the company's position in advanced organ preservation and reflects increasing demand for real-time organ assessment capabilities.

January 2025: XVIVO partnered with leading transplant centers to advance machine perfusion applications for abdominal organ preservation. The initiative strengthens clinical validation efforts and supports broader commercialization of perfusion technologies.

October 2024: Paragonix Technologies expanded its organ preservation portfolio through enhanced transportation and monitoring solutions. The development supports integrated preservation workflows and reflects growing emphasis on organ logistics optimization.

July 2024: Bridge to Life Ltd. expanded commercialization of preservation solutions across international transplantation markets. The initiative strengthens global distribution capabilities and reflects rising demand for advanced preservation products.

Critical Business Questions Addressed

What is the long-term value creation potential of the global kidney preservation market?

The report evaluates revenue expansion opportunities arising from increasing transplant volumes, donor pool diversification, and technology adoption.

Which preservation technologies will generate the highest investment returns?

The study assesses comparative growth potential across static cold storage, hypothermic perfusion, and normothermic perfusion technologies.

Which donor categories offer the strongest future demand outlook?

The report analyzes evolving utilization trends across standard criteria, expanded criteria, circulatory death, and living donor segments.

How will regional healthcare investments influence market competitiveness?

The assessment identifies regions attracting infrastructure investment and technology commercialization activity.

Which stakeholder groups should prioritize strategic partnerships?

The report evaluates collaboration opportunities among hospitals, procurement organizations, device manufacturers, and preservation solution providers.

Beyond the Forecast

Kidney preservation is evolving from a logistical requirement into a clinically differentiated value driver within transplantation ecosystems.

Organizations that integrate advanced perfusion technologies, viability assessment tools, and digital monitoring platforms will capture disproportionate value creation opportunities.

Future competitive advantage will depend on maximizing organ utilization rates, improving graft outcomes, and expanding access to transplantation through preservation innovation.

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