

# **Global Peritoneal Dialysis Market Size study & Forecast, by Product Type (CAPD and APD), Product (Cyclers and Fluids), End User (Home healthcare and Hospitals) and Regional Forecasts 2025-2035**

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## **Abstracts**

The Global Peritoneal Dialysis Market is valued at approximately USD 5.62 billion in 2024 and is anticipated to grow at a CAGR of 9.60% over the forecast period 2025-2035. Peritoneal dialysis (PD) is a life-sustaining renal replacement therapy that leverages the body's peritoneum as a natural semipermeable membrane to filter waste products and excess fluid when kidneys fail to function properly. Unlike traditional hemodialysis, PD can be performed at home, allowing patients greater independence and flexibility. Its growing adoption is being driven by rising prevalence of end-stage renal disease (ESRD), surging incidence of diabetes and hypertension, and the increasing preference for home-based care. Technological advancements in PD solutions, improved cyclers devices, and the support of government reimbursement policies are expected to further stimulate market expansion throughout the forecast horizon.

The escalating global burden of chronic kidney disease has fueled an undeniable surge in the demand for peritoneal dialysis. According to the International Society of Nephrology, more than 850 million people worldwide are living with kidney disease, a significant proportion of whom will require dialysis during their lifetime. Patients are progressively shifting toward PD owing to its lower infrastructure needs, cost-effectiveness, and greater patient-centric benefits compared to in-center hemodialysis. Moreover, innovations in PD fluids designed to reduce complications, along with integration of smart digital health platforms for remote monitoring, are unlocking lucrative opportunities for healthcare providers and device manufacturers alike. However, the market's growth trajectory could be hampered by risks of peritonitis,

concerns around patient adherence, and competition from hemodialysis and kidney transplantation.

The detailed segments and sub-segments included in the report are:

By Product Type:

CAPD (Continuous Ambulatory Peritoneal Dialysis)

APD (Automated Peritoneal Dialysis)

By Product:

Cyclers

Fluids

By End User:

Home Healthcare

Hospitals

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

#### Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

#### Latin America

Brazil

Mexico

#### Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Continuous Ambulatory Peritoneal Dialysis (CAPD) is expected to dominate the market. CAPD's leadership is attributed to its simplicity, cost-effectiveness, and the flexibility it affords patients who wish to administer treatment without machines or clinical assistance. This method has been particularly well received in developing economies where access to hospital-based dialysis centers is limited, thereby cementing its role as the most widely adopted form of PD. Furthermore, patient preference for a portable, low-technology solution that seamlessly integrates into daily life continues to fuel CAPD's strong market share. While APD is increasingly popular in developed countries due to its automated convenience during nighttime hours, CAPD remains the cornerstone of PD adoption globally.

On the revenue side, PD fluids contribute the lion's share to the market, driven by their recurring and indispensable nature in every dialysis cycle. As PD therapy requires daily use of dialysate solutions, this segment inherently sustains consistent demand and thus dominates revenue streams. Although cyclers are witnessing rapid technological innovation and uptake, particularly in APD, they represent a one-time or infrequent capital purchase. In contrast, the continuous consumption of fluids creates an enduring revenue pipeline for manufacturers, making it the leading contributor to the industry's topline performance.

The key regions considered for the Global Peritoneal Dialysis Market study include Asia Pacific, North America, Europe, Latin America, and Middle East & Africa. North America currently commands the largest market share, driven by advanced healthcare infrastructure, supportive reimbursement frameworks, and high prevalence of ESRD among the aging population. Europe follows closely, supported by strong public healthcare systems and favorable policies encouraging home dialysis adoption. However, Asia Pacific is anticipated to be the fastest-growing region, spurred by surging patient volumes in densely populated countries like China and India, increasing investments in healthcare infrastructure, and rising awareness about cost-effective dialysis modalities. Latin America and the Middle East & Africa are gradually emerging with untapped opportunities, as government initiatives and private investments accelerate dialysis accessibility.

Major market players included in this report are:

Baxter International Inc.

Fresenius Medical Care AG & Co. KGaA

B. Braun Melsungen AG

Medtronic plc

Nipro Corporation

DaVita Inc.

Toray Medical Co., Ltd.

Terumo Corporation

Cantel Medical Corp.

JMS Co. Ltd.

AWAK Technologies

Dialife SA

Medionics Healthcare Pvt. Ltd.

Renax Biomedical Tech. Co., Ltd.

Asahi Kasei Medical Co., Ltd.

Global Peritoneal Dialysis Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period - 2025-2035

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent to up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope\*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

#### Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional-level analysis for each market segment.

Detailed analysis of the geographical landscape with country-level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of the competitive structure of the market.

Demand side and supply side analysis of the market.

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