

# Global Peritoneal Dialysis Market - 2025-2033

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## Abstracts

### Overview

The global peritoneal dialysis market reached US\$ 4.85 billion in 2024 and is expected to reach US\$ 9.16 billion by 2033, growing at a CAGR of 7.5% during the forecast period 2025-2033.

Peritoneal dialysis is a medical treatment used to remove waste products and excess fluids from the body when the kidneys are no longer functioning properly. It is one of the two main types of dialysis, the other being hemodialysis. Unlike hemodialysis, which filters blood outside the body, peritoneal dialysis uses the patient's peritoneum (the lining of the abdominal cavity) as a natural filter to perform the dialysis process.

Peritoneal dialysis offers a personalized and flexible approach to dialysis, utilizing the body's natural filtering system. It is often chosen by patients who are looking for a more autonomous treatment option or those who have medical conditions that preclude them from receiving hemodialysis. However, careful management is required to prevent complications such as infection and to ensure the effectiveness of the dialysis process.

### Market Dynamics: Drivers & Restraints

Rising advancements in peritoneal dialysis are significantly driving the peritoneal dialysis market growth

The rising advancements in peritoneal dialysis are playing a pivotal role in the growth of the peritoneal dialysis market. These advancements are making the treatment more efficient, accessible, and patient-friendly, which in turn boosts the adoption of peritoneal dialysis over traditional hemodialysis.

There have been developments in peritoneal dialysis fluids, which are now more effective in removing toxins and reducing complications such as infections. Companies like Baxter, Mitra Industries, and Fresenius Medical Care have introduced advanced PD solutions that increase treatment efficacy and improve patient outcomes.

For instance, in March 2024, Mitra Industries launched its innovative triple-chambered peritoneal dialysis (PD) bag that has a near-neutral pH and low glucose degradation products (GDPs). The use of this bag will help nephrologists enhance patient care and improve outcomes. The conventional PD solutions have acidic pH, which has a deleterious effect on the functionality of the peritoneal membrane, the lifeline of PD.

New advancements in technology, like wearables, allow for better customization of the treatment. For instance, in June 2023, AWAK Technologies and Singapore General Hospital launched a pre-pivotal clinical trial with the enrolment of their first subject to study the safety and efficacy of an Automated Wearable Artificial Kidney Peritoneal Dialysis device.

The risk of infections associated with peritoneal dialysis is hampering the market growth

The risk of infections associated with peritoneal dialysis (PD) significantly hampers the growth of the peritoneal dialysis market. While PD offers many advantages, such as being a more flexible, home-based treatment, the risk of infection, particularly peritonitis (inflammation of the peritoneum), remains a serious concern.

Peritonitis is one of the most common and severe complications of PD. It occurs when bacteria or fungi enter the peritoneal cavity, often through the catheter. Peritonitis can lead to hospitalization, extended treatment periods, and sometimes the need to switch to hemodialysis if it is not controlled effectively. This risk makes some patients hesitant to choose PD, especially when they weigh the possibility of infections against the convenience of home treatment.

The perceived risk of infection is a key reason why some patients and healthcare providers prefer hemodialysis over PD. Hemodialysis, although less convenient, is performed in a controlled clinical environment under strict medical supervision, thus reducing the risk of infections. The fear of infection and the management challenges associated with PD, especially for elderly or immunocompromised patients, can prevent wider adoption.

## Segment Analysis

The global peritoneal dialysis market is segmented based on type, product type, end-user, and region.

#### Type:

The continuous ambulatory peritoneal dialysis (CAPD) segment is expected to dominate the peritoneal dialysis market with the highest market share

CAPD is peritoneal dialysis that can be done manually, without a machine, throughout the day. Continuous ambulatory peritoneal dialysis (CAPD) is done to remove wastes, chemicals, and extra fluid from the patient's body. During CAPD, a liquid called dialysate is put into the abdomen through a catheter (thin tube). The dialysate pulls wastes, chemicals, and extra fluid from blood through the peritoneum.

After the fluid is allowed to interact with the patient's capillary blood, it is removed through the same permanent catheter, carrying with it the waste products like urea and creatinine. The procedure is repeated manually three times a day. Once started, CAPD has to be continued lifelong or till a renal transplantation is carried out. It offers the advantages of greater clearance of higher molecular-weight substances than during hemodialysis, good control of blood pressure, marked improvement of anemia, and unrestricted diet.

CAPD is perhaps the most uncomplicated method of carrying out dialysis as it involves the manual instillation of up to 3 L of dialysis fluid in the peritoneal cavity through an indwelling abdominal catheter four to five times a day. This typically means three or four short dwells during the day and a long dwell overnight. In adults, the total volume of fluid exchanged in a day typically ranges from 8 to 10 L. Thus, dialysis occurs continuously throughout the entire 24-hour period, and patients are free to engage in daily activities between exchanges.

#### Geographical Analysis

Europe is expected to hold a significant position in the global peritoneal dialysis market with the highest market share

Europe has seen significant advancements in peritoneal dialysis (PD) over the years, with increasing adoption due to its patient-friendly nature and the growing need for kidney care solutions. The region benefits from strong regulatory frameworks, which

ensure high-quality standards for medical treatments, including PD.

Additionally, healthcare providers are increasingly focusing on improving patient outcomes by offering a range of innovative PD products and services. Despite challenges such as disparities in access to care across different countries, there has been a steady growth in PD usage, driven by factors such as patient preference for home-based care, cost-effectiveness, and a focus on improving quality of life.

As the European population ages and the prevalence of chronic kidney disease rises, the demand for effective and patient-centered treatments like PD will increase. The increasing prevalence of chronic kidney disease (CKD) in Europe significantly drives the demand for peritoneal dialysis (PD).

For instance, according to a report by the European Parliament in 2022, approximately 100 million individuals are affected by CKD across the European continent, and projections indicate that CKD will become the fifth leading cause of death globally by 2040. To avoid the risks of end-stage renal disease, individuals are expected to increase the adoption of peritoneal dialysis, which is considered a comfortable treatment.

### Competitive Landscape

Top companies in the peritoneal dialysis market include Baxter, Fresenius Medical Care AG, BD, B. Braun Medical Inc., Mozarc Medical Holding LLC., Terumo Corporation, MITRA, Renax Biomedical Tech. Co., Ltd., Medionics, Diener Precision Pumps Ltd., and others.

### Why Purchase the Report?

**Pipeline & Innovations:** Reviews ongoing clinical trials, product pipelines, and forecasts upcoming advancements in medical devices and pharmaceuticals.

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The global peritoneal dialysis market report delivers a detailed analysis with 62 key tables, more than 54 visually impactful figures and 198 pages of expert insights, providing a complete view of the market landscape.

#### Target Audience 2024

**Manufacturers:** Pharmaceutical, Medical Device, Biotech Companies, Contract Manufacturers, Distributors, Hospitals.

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Consulting & Advisory: Healthcare Consultants, Industry Associations, Analysts.

Supply Chain: Distribution and Supply Chain Managers.

Consumers & Advocacy: Patients, Advocacy Groups, Insurance Companies.

Academic & Research: Academic Institutions.

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