

Peritoneal Dialysis Equipment Market Insights, Competitive Landscape and Market Forecast–2026

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Abstracts

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Peritoneal Dialysis Equipment Market By Product Type (Systems And Consumables [Peritoneal Dialysis Solution, Peritoneal Dialysis Transfer Sets, Peritoneal Dialysis Catheters, Others]), By Treatment Type (Continuous Ambulatory Peritoneal Dialysis [Capd], Automated Peritoneal Dialysis [Apd]), By End-User (Hospitals, Dialysis Centres, And Others), by geography, is anticipated to expand at a static CAGR owing to the rising prevalence of kidney disorders such as end-stage renal disorder, chronic kidney disorder, among others and technological advancement in the peritoneal dialysis products

The global Peritoneal Dialysis Equipment market was valued at USD 4.12 billion in 2020, growing at a CAGR of 5.89 % during the forecast period from 2021 to 2026, to reach USD 5.81 billion by 2026. The increase in demand for Peritoneal Dialysis Equipment is primarily attributed to the increasing prevalence of kidney disorders such as end-stage kidney disorder, kidney failure, and others. In addition constantly increasing old population, high blood pressure, and high diabetes prevalence is also a driving factor for peritoneal dialysis equipment as old age and diabetic people are more likely to develop kidney disorders. Moreover, technological advancement in the peritoneal dialysis product pipeline and increase in product approvals are among the other factors responsible for the global peritoneal dialysis equipment market.

Peritoneal Dialysis Equipment Market Dynamics:

The demand for Peritoneal Dialysis Equipment is burgeoning at present due to the rising prevalence of kidney associated disorders such as acute kidney injury, end-stage

renal disorders, among others, worldwide. According to the International Society of Nephrology 2021, there are around 13.3 million cases of acute kidney injury (AKI) worldwide. The burden of AKI is gradually increasing in developing countries with an estimated annual incidence of 11.3 million.

Furthermore, acute conditions such as metabolic acidosis, electrolyte imbalance, uraemia, among others could also raise the demand for peritoneal dialysis equipment as dialysis is needed by the patients suffering from these conditions.

In addition, the rising burden of diabetes among the population across the globe is also a factor that would lead to the increase in demand for peritoneal dialysis. This is because uncontrolled diabetes hampers the kidney's ability to remove waste products and excessive fluids from the body. This situation is known as diabetic nephropathy. As per the International Diabetes Federation (IDF) 2020 statistics, in the year 2019, approximately 463 million adult population in the world were living with diabetes which is estimated to shoot up to 700 million by the end of the year 2045. Also, as per the IDF 2021 stats, the world's more than 80% of end-stage renal disorders (ESRD) is caused due to diabetes, hypertension, or a combination of both. Therefore, rising unmanageable diabetes can be a potential factor contributing to the peritoneal dialysis equipment market growth.

Additionally, the major advantages associated with peritoneal dialysis such as the reduced frequency in visits to a dialysis centre, use of the peritoneal dialysis at home by the patients without any assistance, and fewer restriction on intake of diet and fluid in comparison to haemodialysis and others are likely to surge the demand for peritoneal dialysis among the target population thereby propelling the global market for peritoneal dialysis equipment.

Henceforth, all the above-mentioned factors will contribute to the global peritoneal dialysis equipment market growth during the forecasted period.

In addition, the unprecedented COVID-19 pandemic currently presents a variety of challenges for clinical healthcare providers and patients around the world. The increase in the number of COVID cases along with the increase in severity is likely to lead to a potential increase in the incidence of kidney damage. Due to the pandemic, the need for kidney replacement fluids has increased significantly around the world. According to the American Society of Nephrology 2021, in the pre-COVID-19 era, 23,105 patients were treated for AKI with renal replacement therapy annually whereas the demand for renal replacement therapy in patients with COVID-19 has increased to 4.9% in 2020 from

0.9% before the pandemic. The gradual shift towards home haemodialysis or peritoneal dialysis to curb the spread of COVID-19 infection has greatly accelerated patient interest in treating kidney disorders at home. This factor is likely to drive the adoption of peritoneal dialysis products during the epidemic.

However, certain factors such as the risk and complication associated with the peritoneal dialysis (peritonitis) and the high cost of the equipment are likely to impede the market growth of peritoneal dialysis equipment.

Peritoneal Dialysis Equipment Market Segment Analysis:

Peritoneal Dialysis Equipment Market by Product Type (Systems and Consumables [Peritoneal Dialysis Solution, Peritoneal Dialysis Transfer Sets, Peritoneal Dialysis Catheters, Others]), By Treatment Type (Continuous Ambulatory Peritoneal Dialysis [CAPD], Automated Peritoneal Dialysis [APD]), By End-User (Hospitals, Dialysis Centres, and Home Care Settings), and By Geography (North America, Europe, Asia-Pacific, and Rest of the World).

In the Peritoneal Dialysis Equipment product segment, the consumables segment which is further sub segmented into peritoneal dialysis solution, peritoneal dialysis catheters, peritoneal dialysis transfer sets, and others is expected to dominate the market during the forecast period. For instance, peritoneal dialysis solution are used in both types of treatment i.e. continuous ambulatory peritoneal dialysis and automatic peritoneal dialysis. In addition, rising research and development to produce technologically advanced peritoneal dialysis fluids such as biocompatible fluids with more physiologic pH and reduced glucose degradation products could also lead to market growth of peritoneal dialysis solutions.

Also, peritoneal dialysis solution approval could increase the segmental market for the peritoneal dialysis equipment market. In 2018, WEGO Terumo (Weihai) Medical Products Co., Ltd, its affiliated company in China, received approval to manufacture and sell peritoneal dialysis (PD) solution.

Moreover, recent product approvals of transfusion sets used in peritoneal dialysis is also expected to spur the market for consumables in the peritoneal dialysis equipment market. For instance, in the year 2019, Baxter received FDA approval for its MiniCap extended life PD transfer sets which is used to transfer peritoneal dialysis solution to the patient catheter from the source solution container during peritoneal dialysis therapy.

Hence, all the above-mentioned factors will lead to the segmental growth of the Peritoneal Dialysis Equipment market in the coming years.

North America is expected to dominate the Overall Peritoneal Dialysis Equipment Market:

Among all the regions, North America is expected to occupy a major share in the overall Peritoneal Dialysis Equipment market during the forecasted period. This domination is due to the increasing population suffering from renal disorders, the presence of a well-established healthcare expenditure system for people suffering from ESRD, gaining popularity for cost-effective and portable dialysis machines for home care settings, and government initiatives towards better management of renal diseases, among others. The Advancing American Kidney Health launched by the Trump administration in the year 2019 is an initiative to raise the adoption of home dialysis and kidney transplantation to 80% of the incident population receiving kidney replacement therapy by 2025.

Further, in the United States, the rising cases of ESRD in the region along with patient pool shifting towards the peritoneal dialysis is anticipated to augment the peritoneal dialysis equipment market in the region. For instance, as per the United States Renal Data System Annual report 2020, the population suffering from ESRD in the region was around 131,636 and around 14,334 people initiated peritoneal dialysis.

Moreover, elevated cases of hypertension among the US population which is a second leading cause of developing kidney malfunction after diabetes is also a factor likely to boost the demand for peritoneal dialysis equipment. According to the Centers for Disease Control and Prevention 2021 data, in the year 2019, an estimated 47%, or 116 million had hypertension.

Also, as per the National Kidney Foundation Inc. 2021, about 37 million Americans were suffering from chronic kidney disorder (CKD) in the region. Thus, rising renal disorders and other comorbidities such as hypertension and diabetes will contribute to the market growth for peritoneal dialysis equipment.

In addition, recent product approval by the US Food and Drug Administration (FDA) for peritoneal dialysis will also boost the market for peritoneal dialysis equipment in the region. For instance, recently in November 2020, Baxter received FDA clearance for its Homechoice Claria automated peritoneal dialysis (APD) system with Sharesource connectivity platform which combines a simple user interface with the benefits of a two-

way remote patient management platform for patients on peritoneal dialysis in the US.

Hence all the aforementioned factors are responsible for contributing to the growth of the peritoneal dialysis equipment market in the region.

Additionally, the Asia-pacific region has future potential for the Peritoneal Dialysis Equipment market. The rising number of AKI, ESRD in the region along with diabetes and hypertension (the leading factors behind the kidney disorders) in the low and middle-income nations are the factors driving the growth of the peritoneal dialysis equipment market. Also, the presence of key manufacturers such as Terumo Corporation, Kelun Group, Huaren Pharmaceutical Co., Ltd., among others in the region will fuel the market for peritoneal dialysis equipment. Moreover, rising disposable income, improving the healthcare system, and guidelines by the government for peritoneal dialysis will also augment the peritoneal dialysis equipment market in the region. For instance, recently in the year 2019, in India, Pradhan Mantri National Dialysis Programme established the guidelines for establishing peritoneal dialysis services in the country. Thus, contributing to the peritoneal dialysis equipment market.

Peritoneal Dialysis Equipment Market Key Players:

Some of the key market players operating in the Peritoneal Dialysis Equipment market include Baxter, Fresenius Medical Care AG & Co. KGaA, Terumo Corporation, Medtronic, Utah Medical Products, Inc., Polymedicure, Cook, Cardiomed, Angioplast, Merit Medical Systems, Amecath, Newsol Technologies Inc., Renax Biomedical Tech. Co., Ltd, Jilin Province Maida Medical Equipment Co., Ltd., Kelun Group, Huaren Pharmaceutical Co., Ltd., Mitra Industries Pvt. Ltd., EQUIPOS DE BIOMEDICINA DE MEXICO S.A DE C.V, Advin Health Care, AWAK Technologies and others.

Recent Developmental Activities in the Peritoneal Dialysis Equipment Market:

In September 2021, Fresenius Medical Care entered into a strategic distribution partnership with JMS Co. Ltd. a provider of medical devices and pharmaceuticals, in Japan. Under this partnership, JMS Co. Ltd will distribute the advanced portfolio of Fresenius Medical Care's home dialysis systems in Japan, including automatic peritoneal dialysis systems.

In October 2020, Fresenius Medical Care received FDA approval for DELFLEX® peritoneal dialysis solutions in Biofine®, an innovative bag material.

In January 2019, AWAK Technologies received the US FDA Breakthrough Device designation for its AWAK Peritoneal Dialysis (AWAK PD) device, a wearable and ultra-portable PD system that incorporates AWAK's patented sorbent technology.

Key Takeaways from the Peritoneal Dialysis Equipment Market Report Study

Market size analysis for current market size (2020), and market forecast for 5 years (2021-2026)

The effect of the COVID-19 pandemic on this market is significant. To capture and analyze suitable indicators, our experts are closely watching the Peritoneal Dialysis Equipment market.

Top key product/services/technology developments, merger, acquisition, partnership, joint venture happened for last 3 years

Key companies dominating the Global Peritoneal Dialysis Equipment Market.

Various opportunities available for the other competitor in the Peritoneal Dialysis Equipment Market space.

What are the top-performing segments in 2020? How these segments will perform in 2026.

Which are the top-performing regions and countries in the current market scenario?

Which are the regions and countries where companies should have concentrated on opportunities for Peritoneal Dialysis Equipment market growth in the coming future?

Target Audience who can be benefited from the Peritoneal Dialysis Equipment Market Report Study

Peritoneal Dialysis Equipment providers

Research organizations and consulting companies

Peritoneal Dialysis Equipment-related organization, association, forum, and other alliances

Government and corporate offices

Start-up companies, venture capitalists, and private equity firms

Distributors and Traders in Peritoneal Dialysis Equipment

Various End-users who want to know more about the Peritoneal Dialysis Equipment Market and latest technological developments in the Peritoneal Dialysis Equipment market.

Frequently Asked Questions for the Peritoneal Dialysis Equipment Market:

1. What is Peritoneal Dialysis Equipment?

Peritoneal dialysis (PD) works by using the body's peritoneal membrane and exchanges of dialysate fluid to filter and clean the blood. PD equipment can be used for both manual and automated treatment types.

2. What is the market for Global Peritoneal Dialysis Equipment?

The global Peritoneal Dialysis Equipment Market was valued at USD 4.12 billion in 2020, growing at a CAGR of 5.89 % during the forecast period from 2021 to 2026 to reach USD 5.81 billion by 2026.

3. What are the drivers for the Global Peritoneal Dialysis Equipment?

The major factors driving the demand for Peritoneal Dialysis Equipment are the rising cases of renal disorders such as acute kidney injury, end-stage renal diseases, and others. Moreover, rising diabetes and hypertension among the population will also contribute to the market growth. In addition, product approvals and technological advancements are also expected to surge the market for peritoneal dialysis equipment.

4. What are the key players operating in Global Peritoneal Dialysis Equipment?

Some of the key market players operating in the Peritoneal Dialysis Equipment market include Baxter, Fresenius Medical Care AG & Co. KGaA, Terumo Corporation, Medtronic, Utah Medical Products, Inc., Polymedicure, Cook, Cardiomed, Angioplast, Merit Medical Systems, Amecath, Newsol Technologies Inc., Renax Biomedical Tech. Co., Ltd, Jilin Province Maida Medical Equipment Co., Ltd., Kelun Group, Huaren

Pharmaceutical Co., Ltd., Mitra Industries Pvt. Ltd., EQUIPOS DE BIOMEDICINA DE MEXICO S.A DE C.V, Advin Health Care, AWAK Technologies and others.

5. Which region has the highest share in the Peritoneal Dialysis Equipment market?

Among all the regions, North America is expected to occupy a major share in the overall Peritoneal Dialysis Equipment market during the forecasted period 2021- 2026. This domination is due to the increasing number of the population suffering from renal disorders, the presence of a well-established healthcare expenditure system for people suffering from ESRD, gaining popularity for cost-effective and portable dialysis machines for home care settings, and government initiatives towards better management of renal diseases, among others.

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