

Global Peritoneal Dialysate Warmer Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Peritoneal Dialysate Warmer market size is expected to reach \$ 17.52 million by 2032, rising at a market growth of 5.9% CAGR during the forecast period (2026-2032).

A peritoneal dialysate warmer is a dedicated ancillary warming device used in peritoneal dialysis to heat sealed peritoneal dialysis solution bags to near body temperature before infusion into the peritoneal cavity. It typically uses dry heat through a warming plate, warming box, insulated heating pouch or sensor-controlled warming chamber, and is generally composed of a heating module, temperature sensor, thermostat, overheat protection structure, insulation layer, power adapter and status display. Portable models may support both household and vehicle power supplies. The product is mainly used for manual exchanges in continuous ambulatory peritoneal dialysis, backup or last-bag warming in automated peritoneal dialysis, hospital PD training and home-care settings. It is not a peritoneal dialysis solution consumable, an automated peritoneal dialysis cyclor, a blood warmer or a general infusion warmer. Its core function is to provide safer, stable and controllable dry-heat warming for PD solution bags. Product labels and patient guidance commonly recommend warming PD solution to about 37°C using dry heat and avoiding water immersion or microwave heating because of contamination, hot-spot and solution-integrity risks.

In 2025, global Peritoneal Dialysate Warmer production reached approximately 110,000 to 125,000 units, mainly covering portable home-use PD bag warmers, tabletop constant-temperature warming boxes, soft heating pouches, and identifiable warming modules integrated into automated peritoneal dialysis systems. Driven by the scale-up of low-to-mid-end home-use products in China, stable replacement demand for higher-priced dedicated devices in Europe and North America, and the gradual expansion of

APD-related warming modules, the global ex-factory and FOB average price of Peritoneal Dialysate Warmers stood at approximately USD 85 to USD 105 per unit in 2025. From 2026 to 2032, the market is expected to grow steadily with rising home peritoneal dialysis penetration, stronger patient-comfort requirements, and more standardized care procedures, although its growth rate will remain below that of PD consumables and automated peritoneal dialysis cyclers because it is a low-replacement-frequency ancillary device.

As the global burden of chronic kidney disease and end-stage kidney disease continues to increase, peritoneal dialysis is becoming more closely linked with home-based care, patient self-management and long-term quality-of-life improvement. Although peritoneal dialysate warmers are not the highest-value core equipment within the PD system, they remain a clearly defined supporting device for manual exchanges and home PD care, particularly for CAPD patients, elderly patients, users in colder regions, night-time treatment and travel scenarios where stable warming is needed. In the United States, the share of new ESRD patients starting peritoneal dialysis reached 14.1% in 2023, an all-time high, indicating that home dialysis and PD adoption continue to improve in mature healthcare markets.

The market opportunity for peritoneal dialysate warmers is mainly driven by higher home PD penetration, stronger demand for patient comfort, standardization of nursing procedures and replacement of non-standard warming methods. Compared with improvised warming through hot water, radiators or microwave ovens, dedicated warmers with thermostat control and overheat protection better fit the safety requirements of PD solution handling and can be incorporated into hospital training, home-care kits and PD supply programs. The key challenge is that the product is a low-replacement-frequency specialty accessory, with lower unit value and weaker consumable stickiness than PD solutions, transfer sets and APD cyclers. Since some APD cyclers already include warming functions, standalone warmers are more concentrated in manual exchange, backup warming, portable care and specific patient-use cases. Future demand will shift toward compact size, temperature accuracy, portable power supply, low energy consumption, easy cleaning and home-safety design, while competition will move from basic heating performance toward patient experience, care compliance and stronger fit with home peritoneal dialysis workflows.

This report studies the global Peritoneal Dialysate Warmer production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Peritoneal

Dialysate Warmer and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Peritoneal Dialysate Warmer that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Peritoneal Dialysate Warmer total production and demand, 2021-2032, (Units)

Global Peritoneal Dialysate Warmer total production value, 2021-2032, (USD Million)

Global Peritoneal Dialysate Warmer production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Peritoneal Dialysate Warmer consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Peritoneal Dialysate Warmer domestic production, consumption, key domestic manufacturers and share

Global Peritoneal Dialysate Warmer production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Peritoneal Dialysate Warmer production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Peritoneal Dialysate Warmer production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Peritoneal Dialysate Warmer market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Vantive, Fresenius Medical Care AG, VEBA MediTemp B.V., Terumo Corporation, Stickman Dialysis Industries, Medionics International Inc., Pedigo Products Inc., Dongguan Great Wall Development Technology Co., Ltd., Jiangsu JARI Medical Technology Co., Ltd., JMS Co., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Peritoneal Dialysate Warmer market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by

manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Peritoneal Dialysate Warmer Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Peritoneal Dialysate Warmer Market, Segmentation by Type:

Portable Hard Case Warmer

Stationary Bench Top Warmer

Soft Heating Pouch

Clinical Warming Cabinet

Global Peritoneal Dialysate Warmer Market, Segmentation by Warming Technology:

Resistive Conductive Heating

Convection Heated Chamber

Flexible Heating Film

Others

Global Peritoneal Dialysate Warmer Market, Segmentation by Temperature Control:

Fixed 37°C Control

Adjustable Thermostat Control

Closed Loop Sensor Control

Basic Thermal Limiter and Others

Global Peritoneal Dialysate Warmer Market, Segmentation by Power and Voltage:

AC Mains Powered

AC and Vehicle DC Powered

Battery Assisted Powered

USB Low Power and Others

Global Peritoneal Dialysate Warmer Market, Segmentation by Application:

Home Care Use

Hospital and Clinic Use

Long Term Care Facility

Travel and Temporary Care

Companies Profiled:

Vantive

Fresenius Medical Care AG

VEBA MediTemp B.V.

Terumo Corporation

Stickman Dialysis Industries

Medionics International Inc.

Pedigo Products Inc.

Dongguan Great Wall Development Technology Co., Ltd.

Jiangsu JARI Medical Technology Co., Ltd.

JMS Co., Ltd.

Stericox India Private Limited

Key Questions Answered:

1. How big is the global Peritoneal Dialysate Warmer market?
2. What is the demand of the global Peritoneal Dialysate Warmer market?
3. What is the year over year growth of the global Peritoneal Dialysate Warmer market?
4. What is the production and production value of the global Peritoneal Dialysate Warmer market?
5. Who are the key producers in the global Peritoneal Dialysate Warmer market?
6. What are the growth factors driving the market demand?

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