

Global Peritoneal Dialysis Access & Accessories Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/GBFADD11373FEN.html>

Date: February 2026

Pages: 118

Price: US\$ 4,480.00 (Single User License)

ID: GBFADD11373FEN

Abstracts

The global Peritoneal Dialysis Access & Accessories market size is expected to reach \$ 650 million by 2032, rising at a market growth of 6.7% CAGR during the forecast period (2026-2032).

Peritoneal Dialysis Access & Accessories refers to the ecosystem of sterile consumables and compatible components that support the full PD access pathway—from access creation and connection exchange to routine home care and complication management. It encompasses the implantable peritoneal dialysis catheter as well as transfer sets, connectors and extension lines, titanium/plastic adaptors and caps, clamps, flush/locking-related components, and exit-site securement and care supplies. The core problem this category solves is enabling safe, standardized dialysate infusion and drainage with minimal contamination exposure during frequent disconnect/reconnect cycles, while reducing the risk of peritonitis and other infections, maintaining patency, minimizing leakage or blockage, and improving usability and adherence in long-term home-based therapy. Its evolution closely tracks the shift of PD from hospital-centered care to home-centered care: early PD relied on simpler connection methods with more manual handling and less consistent infection control, but as CAPD/APD expanded and “reduced touch/reduced exposure” principles became embedded in clinical practice—supported by clearer guidelines and nursing protocols—accessories progressed from fragmented items to more systematized, traceable, and training-friendly solutions. In many markets, this has also created “platform-like” access ecosystems where catheter, transfer sets, connection systems, and care supplies are designed and validated to work together within a standardized clinical pathway. Upstream materials and components typically include medical-grade polymers (e.g., silicone, polyurethane, polypropylene, polycarbonate) for catheters, tubing, connectors, caps, and clamps; precision-molded parts and sealing structures (O-

rings, valve/check mechanisms) designed for low leakage and repeated operation; sterile barrier and packaging materials (medical papers, Tyvek, blister trays, pouches, indicators, labels); textile/nonwoven and medical adhesive materials for securement and exit-site care; and, where applicable, radiopaque markers and coating/surface-treatment systems. The upstream supply chain is commonly formed by medical resin and compound suppliers, precision injection-molding and tooling specialists, silicone extrusion/assembly manufacturers, sealing component vendors, sterile packaging suppliers, and sterilization service providers. In 2025, the global production capacity of peritoneal dialysis access and accessories reached 7.0 million units, with sales volume totaling 4.726 million units. The average selling price was approximately USD 85.3 per unit, and manufacturers' gross margins were generally in the range of 20% to 30%.

The current PD access and accessories market is defined by system-level purchasing centered on infection risk control and product bundling optimized for home usability. Hospitals and dialysis programs increasingly evaluate accessories as part of an end-to-end access quality pathway rather than interchangeable “generic” consumables, because connector integrity, repeated-use sealing performance, reduced-touch/reduced-exposure designs, workflow fit, and the availability of training and follow-up support all influence real-world peritonitis risk and patient adherence. Competition therefore tends to favor established players that offer a platform-like ecosystem—validated compatibility across catheter, transfer sets, connectors, and care supplies, reinforced by standardized training—creating strong clinical stickiness. Regional suppliers often enter through local registration agility, delivery reliability, and cost positioning, but must overcome hurdles in clinical compatibility evidence, manufacturing consistency, and hospital-level standardization. At the same time, tendering and cost containment continue to intensify, keeping the market in a constant push–pull between price pressure and outcome-driven value (lower infection and fewer complications), which elevates the importance of credible evidence and measurable workflow improvements.

Looking ahead, the category will evolve toward lower contamination exposure, higher procedural standardization, and broader digital traceability, extending deeper into home care and full-cycle chronic management. On the product side, connection and transfer systems will continue shifting toward more closed, simplified, low-error designs that maintain stable sealing performance through frequent disconnect/reconnect cycles and reduce microbial ingress risk. Accessory offerings will become more modular and scenario-specific, with clearer standard packs plus optional modules aligned to CAPD versus APD routines, patient capability differences, and variability in nursing resources—reducing unnecessary items while lowering use complexity. From a supply-

chain and compliance standpoint, UDI/barcode capture and integration with hospital inventory systems will become more common, turning accessories from “consumables” into operational data entry points. Service models may expand around structured training, follow-up, infection-event review, and continuous improvement. As remote nursing and chronic-care platforms mature, accessory design will place even greater emphasis on user experience and pathway consistency to support reliable aseptic practice at home and reduce outcome variability driven by adherence.

Key drivers include healthcare systems’ dual focus on efficiency and quality in chronic disease management: expanding home dialysis, easing pressure on in-center HD capacity, and reducing complications through standardized routines are shared objectives across many regions. Clinical guidelines and quality metrics that emphasize peritonitis, access dysfunction, and readmissions also push providers to treat connection systems and care accessories as high-leverage intervention points. In addition, nursing shortages and leaner hospital operations increase the appeal of accessory bundles that are easier to train, simpler to use, and less prone to rework. Major constraints cluster around evidence thresholds, switching risk, and compliance costs: requirements for materials, sterilization, packaging validation, and change control vary by jurisdiction, and even “simple” accessory changes can trigger revalidation and regulatory burden. Clinicians often have strong pathway dependence on existing platforms, and because adverse events carry high clinical and reputational costs, platform switching typically demands substantial training and real-world data. Combined with tender-cycle uncertainty, aggressive cost pressure, and supply risks tied to critical materials and sterilization/packaging capacity, these factors can slow adoption of new entrants and delay the scaling of premium accessory solutions.

This report studies the global Peritoneal Dialysis Access & Accessories production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Peritoneal Dialysis Access & Accessories 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 Dialysis Access & Accessories that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Peritoneal Dialysis Access & Accessories total production and demand, 2021-2032, (K Units)

Global Peritoneal Dialysis Access & Accessories total production value, 2021-2032,

(USD Million)

Global Peritoneal Dialysis Access & Accessories production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Peritoneal Dialysis Access & Accessories consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Peritoneal Dialysis Access & Accessories domestic production, consumption, key domestic manufacturers and share

Global Peritoneal Dialysis Access & Accessories production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Peritoneal Dialysis Access & Accessories production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Peritoneal Dialysis Access & Accessories production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Peritoneal Dialysis Access & Accessories 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 Medtronic, Fresenius, Baxter, US rental care, B.Braun, Diaverum, Nipro Corporation, Asahi Kasei, Nikkiso, Toray, 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 Dialysis Access & Accessories market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K 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 Dialysis Access & Accessories Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Peritoneal Dialysis Access & Accessories Market, Segmentation by Type:

Straight Catheter

Pigtail-curved Catheter

Others

Global Peritoneal Dialysis Access & Accessories Market, Segmentation by Material:

Silicone

Polyurethane

Surface Modification Materials

Global Peritoneal Dialysis Access & Accessories Market, Segmentation by Implantation Procedure:

Percutaneous Catheter Placement

Laparoscopic Catheter Placement

Others

Global Peritoneal Dialysis Access & Accessories Market, Segmentation by Application:

Acute Peritoneal Dialysis (APD)

Chronic peritoneal dialysis (CPD)

Companies Profiled:

Medtronic

Fresenius

Baxter

US rental care

B.Braun

Diaverum

Nipro Corporation

Asahi Kasei

Nikkiso

Toray

WEGO group

Merit Medical

PFM Medical

AMECATH

AdvinHealthcare

Key Questions Answered:

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

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