

# Global Peritoneal Dialysis (PD) Supplies Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Peritoneal Dialysis (PD) Supplies market size is expected to reach \$ 4946 million by 2032, rising at a market growth of 6.0% CAGR during the forecast period (2026-2032).

Peritoneal Dialysis (PD) supplies refer to the set of disposable and periodically replaced medical consumables used to deliver peritoneal dialysis therapy, in which a patient's peritoneal membrane acts as a semi-permeable barrier to remove uremic toxins, correct electrolyte imbalance, and control fluid overload when the kidneys fail. The central problem these products address is the life-threatening accumulation of metabolic waste and excess water in chronic kidney disease/end-stage kidney disease, while enabling a home-based, patient-managed alternative to in-center hemodialysis. Typical PD supplies include sterile dialysate solutions (with varying osmotic agent concentrations/formulations), solution bags and overwraps, tubing sets and transfer sets, PD catheters with accessories, connectors/clamps/valves, disinfecting caps and sterile connection protection devices, drain bags, dressings and catheter care kits, and when used with automated peritoneal dialysis (APD) single-use cassettes and dedicated disposable tubing assemblies that interface with the cyclers. Historically, PD evolved from early clinical exploration of the peritoneum as a natural dialysis membrane into more standardized regimens, and later into widely adopted modalities such as CAPD and APD as sterile connection technology, infection control (especially peritonitis reduction), dialysate stability, biocompatibility, and user workflow improved shifting PD from a hospital procedure toward scalable home therapy. The upstream supply chain typically includes medical-grade polymers (e.g., PVC/PP/PE/TPU and silicone elastomers for bags, tubing, connectors, and seals), pharmaceutical-grade chemicals for dialysate (osmotic agents, electrolytes, buffers, and water-for-injection systems), barrier packaging materials (multilayer films, medical paper-plastic, indicators), nonwovens and medical adhesives for dressings, and precision components such as

injection-molded parts, extruded tubing, sterile connectors, check valves, and flow-control clamps. For APD-related disposables, additional component suppliers provide interface parts and tight-tolerance valve/cassette elements?generally produced under medical quality systems with clean manufacturing, validated sterilization, and regulatory compliance, before final assembly, testing, and sterile release by the PD consumables manufacturer. In 2025, the global production capacity of peritoneal dialysis (PD) supplies reached 600 million units, with total sales volume amounting to 527 million units. The average selling price was approximately USD 6.1 per unit, and corporate gross margins generally ranged between 35% and 50%.

The current market for PD-related supplies shows a pattern of steady underlying demand with noticeable structural divergence: health systems increasingly value home-based care pathways and the operational flexibility PD can provide, while clinicians and providers have become far more sensitive to infection prevention, ease of use, and consistent long-term outcomes?shifting competition from basic availability to safety, workflow simplicity, and lifecycle support. Adoption, however, remains uneven because it depends heavily on local reimbursement design, the maturity of training and nursing infrastructure, institutional inertia tied to established in-center dialysis pathways, and differences in patient education and support. On the supply side, tighter regulation and higher quality-system expectations are accelerating consolidation; leading manufacturers emphasize end-to-end traceability and dependable fulfillment, while smaller players differentiate through curated kits, connection-safety accessories, optimized consumable bundles, and service integration. Clinically, heightened focus on reducing peritonitis, catheter-related complications, and membrane deterioration is directly influencing procurement preferences toward more reliable connection components, protective devices, and care materials, as well as more biocompatible solution-and-packaging choices?raising the bar for brand trust, delivery stability, and training capability.

Looking ahead, the direction is toward patient-centered, system-level upgrades anchored in biocompatibility and end-to-end infection control. Product innovation is likely to emphasize more closed, low-touch sterile connection workflows that reduce contamination exposure and user error, alongside packaging and usability refinements that make daily routines more intuitive and less burdensome. Integration with devices, follow-up programs, and digital support will deepen, with consumables increasingly designed as part of a broader therapy ecosystem?linking education, reminders, adherence support, and complication-risk mitigation into one coherent pathway. This encourages manufacturers to target reductions in patient workload and downstream complications rather than treating supplies as standalone items. Supply-chain capability becomes a strategic differentiator as well: compliant material sourcing, validated sterilization choices, clean manufacturing competence, and resilience against

disruptions will matter more, while environmental and compliance pressures will push exploration of more sustainable materials, packaging, and waste-management approaches?forcing careful trade-offs among performance, cost, regulatory acceptance, and responsible disposal.

The market?s momentum and friction points are tightly intertwined. Key growth drivers include policy and provider interest in home-care models and resource efficiency, patient demand for better quality of life and schedule flexibility, continuous clinical goals around lowering infection and complication burdens, and innovation in usability plus service models that support long-term adherence. Upstream advances in medical polymers, sterile connector components, barrier packaging, and sterilization validation also expand what is technically feasible for safer, simpler consumable systems. The main constraints fall into three buckets: people and process (PD depends on training quality, caregiver capacity, and sustained adherence; weak follow-up amplifies infection risk and undermines confidence), system and incentives (misaligned reimbursement or entrenched provider pathways can slow adoption), and industrial/regulatory realities (sterility assurance, batch consistency, and uninterrupted supply are critical; volatility in raw materials, sterilization capacity constraints, or evolving requirements can raise compliance and operating burdens). Ultimately, manufacturers and providers that can reliably deliver a repeatable ?bundle? of safety performance, patient experience, service support, supply continuity, and regulatory robustness are better positioned to build durable adoption and trust over the next phase.

This report studies the global Peritoneal Dialysis (PD) Supplies production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Peritoneal Dialysis (PD) Supplies 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 (PD) Supplies that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Peritoneal Dialysis (PD) Supplies total production and demand, 2021-2032, (K Units)

Global Peritoneal Dialysis (PD) Supplies total production value, 2021-2032, (USD Million)

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

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

U.S. VS China: Peritoneal Dialysis (PD) Supplies domestic production, consumption, key domestic manufacturers and share

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

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

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

This report profiles key players in the global Peritoneal Dialysis (PD) Supplies 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 Fresenius, Baxter, B. Braun, Diaverum, Nipro, Asahi Kasei, Nikkiso, Toray, Kawasumi Laboratories, JMS, 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 (PD) Supplies 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 (PD) Supplies Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

### Global Peritoneal Dialysis (PD) Supplies Market, Segmentation by Type:

Dialysis Fluid

Catheter

Drainage Bag

Other

### Global Peritoneal Dialysis (PD) Supplies Market, Segmentation by Use Attributes:

Single-Use Products

Reusable Components

### Global Peritoneal Dialysis (PD) Supplies Market, Segmentation by Packaging:

Sterile Packaged Products

Non-Sterile Packaged Products

### Global Peritoneal Dialysis (PD) Supplies Market, Segmentation by Application:

Hospital

Clinic

Other

### **Companies Profiled:**

Fresenius

Baxter

B. Braun

Diaverum

Nipro

Asahi Kasei

Nikkiso

Toray

Kawasumi Laboratories

JMS

Medtronic

Rockwell Medical

Jiangxi Kelun Medical

WEGO

Shanghai Biolog Medical Technology

Covidien

Copper

Terumo

SWS Hemodialysis Care

### **Key Questions Answered:**

1. How big is the global Peritoneal Dialysis (PD) Supplies market?
2. What is the demand of the global Peritoneal Dialysis (PD) Supplies market?

3. What is the year over year growth of the global Peritoneal Dialysis (PD) Supplies market?
4. What is the production and production value of the global Peritoneal Dialysis (PD) Supplies market?
5. Who are the key producers in the global Peritoneal Dialysis (PD) Supplies market?
6. What are the growth factors driving the market demand?

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