

Peritoneal Dialysis Market Opportunity, Growth Drivers, Industry Trend Analysis, and Forecast 2025 - 2034

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Abstracts

The Global Peritoneal Dialysis Market was valued at USD 13.1 billion in 2024 and is estimated to grow at a CAGR of 4.8% to reach USD 20.9 billion by 2034. Key drivers fueling this expansion include the rising incidence of kidney-related conditions, increasing adoption of home-based dialysis solutions, and favorable reimbursement structures supporting dialysis treatment. Additionally, cost efficiency over traditional hemodialysis, combined with a persistent shortfall in kidney donors, further bolsters market demand. Peritoneal dialysis, a life-sustaining therapy for individuals facing end-stage renal disease (ESRD) and acute kidney injury, allows for the effective removal of waste and excess fluid when the kidneys lose function. A growing shift toward patient-managed care at home continues to shape the industry landscape. Moreover, the aging population and a growing number of patients affected by chronic kidney issues are contributing heavily to the uptake of PD solutions globally.

In 2024, the consumables segment held a 63.6% share. This dominance is largely attributed to a higher volume of ESRD cases and increasing demand for essential PD components such as dialysate solutions, PD catheters, and other related consumables. The shift toward home-based therapies has significantly influenced this trend, as patients require a steady supply of these products to conduct regular sessions independently. This growing patient reliance on consumables is magnified by the rising prevalence of both chronic and acute kidney failures, particularly within the elderly population. These demographic changes continue to push demand for dependable, home-compatible dialysis solutions.

The continuous ambulatory peritoneal dialysis (CAPD) segment generated USD 7.6 billion in 2024 and is forecasted to grow at a 4.6% CAGR during 2025-2034. CAPD

remains a preferred choice in regions where access to automated dialysis equipment is limited. This approach enables patients to perform manual exchanges multiple times a day without relying on machines, offering affordability, ease of use, and the flexibility to maintain normal routines. Its growing popularity stems from its ability to empower patients with greater control over their treatment while reducing dependence on dialysis centers.

United States Peritoneal Dialysis Market was valued at USD 4.04 billion in 2024 and is expected to grow at a 3.5% CAGR from 2025 through 2034. The rising acceptance of PD in the country is due to its patient-centric benefits, including treatment flexibility, at-home administration, and improved quality of life. Healthcare providers are increasingly recommending PD as a viable alternative to center-based hemodialysis, especially as the healthcare system embraces value-based care models. This upward trend is further fueled by growing awareness and better training programs for patients opting for home dialysis.

The top-tier companies actively shaping the Global Peritoneal Dialysis Market are Terumo Corporation, Vantive (Baxter), Diaverum (M42), BD, B. Braun, Davita Kidney Care, Polymed, Utah Medical Products, Vivance, Fresenius Medical Care, medCOMP, and Mozarc Medical. To secure their market positions and enhance competitiveness, companies operating in the peritoneal dialysis sector are actively pursuing several strategic initiatives.

These include expanding their product portfolios with more advanced and user-friendly dialysis solutions tailored for home use, as well as forming partnerships with healthcare providers to strengthen service delivery networks. Many firms are investing heavily in R&D to develop next-generation PD devices with improved efficiency and safety profiles. Additionally, strategic mergers and acquisitions are being used to widen geographic reach and integrate specialized capabilities. Training programs and awareness campaigns are also being launched to boost patient adoption and adherence, particularly in developing regions.

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