

# Global Renal Dialysis Equipment Market – Products and End-Use Facilities

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## Abstracts

### Renal Dialysis Equipment Market Trends and Outlook

Renal dialysis equipment includes medical devices essential for treating kidney failure by removing waste, excess fluids, and toxins from the bloodstream. The three main types of dialysis are hemodialysis, peritoneal dialysis (PD), and continuous renal replacement therapy (CRRT). Hemodialysis, the most common method, filters blood through a dialyzer with a semipermeable membrane and is typically performed three to five times a week. PD uses the patient's peritoneal membrane to filter waste via dialysate infused into the abdominal cavity, offering flexibility for home treatment but carrying infection risks. CRRT is a continuous, slower process suited for critically ill patients, minimizing blood pressure fluctuations.

Dialysis equipment includes dialyzers, blood pumps, catheters, tubing sets, and monitoring systems that ensure effective blood filtration and fluid balance, enhancing outcomes and quality of life for patients. The global renal dialysis equipment market is estimated at US\$20.2 billion in 2024 and projected to reach US\$27.8 billion by 2030, growing at a CAGR of 5.5%. Growth is driven by the rising incidence of chronic kidney disease (CKD) and end-stage renal disease (ESRD), fueled by diabetes, hypertension, aging populations, unhealthy lifestyles, and obesity.

Technological advancements such as portable and home-based machines improve patient comfort, reduce hospital visits, and lower infection risks. The shift to home dialysis and the rise in telehealth and remote monitoring further enhance care access and outcomes. Increased R&D investments are fostering innovations like AI-integrated systems and real-time monitoring. Additionally, expanding healthcare infrastructure, new dialysis centers, and favorable reimbursement policies support market growth.

Together, these trends are shaping a robust future for the renal dialysis equipment market.

## Renal Dialysis Equipment Regional Market Analysis

North America holds the largest share of the global renal dialysis equipment market at 38.3% in 2024, primarily due to the high prevalence of chronic kidney disease (CKD), an advanced healthcare system, and substantial investments in R&D. The region benefitted from innovation and product advancement bolstered by the leading pharmaceutical firms, numerous contract research organizations (CROs), and strict regulatory requirements. The rising public spending on healthcare, favorable reimbursement policies, and growing awareness regarding dialysis alternatives further contribute to its strong market presence. In contrast, the Asia Pacific region is the fastest-growing market, projected to record a CAGR of 7.3% during the forecast period 2024-2030. This growth is driven by lower operational costs, expanding networks of CROs, and increasing investments in healthcare in nations such as China and India. Contributing factors include a high prevalence of diabetes and hypertension, a growing number of dialysis centers, more organ transplants, and a rapidly aging population. With improved healthcare access and rising disposable incomes, the Asia Pacific region is poised to become a significant player in the global renal dialysis equipment market.

## Renal Dialysis Equipment Market Analysis by Product Type

The hemodialysis equipment segment dominates the renal dialysis equipment market by product type, accounting for a 68.7% share in 2024 due to its efficacy and widespread use in managing end-stage renal disease (ESRD). Hemodialysis remains the preferred treatment for its superior ability to eliminate toxins and excess fluids compared to peritoneal dialysis. Advances in technology have improved treatment results, while the increasing prevalence of chronic kidney disease (CKD) and ESRD, along with an aging demographic, continue to fuel this segment's demand. On the other hand, the peritoneal dialysis (PD) equipment segment is expected to witness significant growth with a 7.2% CAGR from 2024 to 2030, driven by its cost-effectiveness, ease of use, and compatibility with at-home treatment. Peritoneal dialysis is particularly appealing in developing regions, where the rise in disease cases, broadening healthcare access, and growing awareness promote greater adoption of peritoneal dialysis as an alternative to hemodialysis.

## Renal Dialysis Equipment Market Analysis by End-User

The in-center dialysis segment leads the renal dialysis equipment market by end-user with an estimated share of 75.3% in 2024, driven by widespread availability in hospitals, clinics, and specialty centers that enhance treatment accessibility. The professional oversight, sophisticated machinery, and ability to promptly address complications make it particularly suitable for elderly or high-risk patients, owing to the availability of skilled personnel, advanced technology, and reduced likelihood of treatment errors. Additionally, support from public healthcare and insurance systems further encourages its adoption. Conversely, the home dialysis segment is experiencing rapid growth, with an anticipated CAGR of 7.5% from 2024 to 2030, fueled by innovations in portable devices and remote monitoring that allow patients to take charge of their care. This trend indicates a shift in patient preferences towards more flexible and personalized healthcare solutions. Together, these segments reflect the market's ability to balance widespread accessibility, patient safety, and the growing preference for at-home care, driving continuous growth.

## Renal Dialysis Equipment Market Report Scope

This global report on Renal Dialysis Equipment analyzes the market based on product type, End-User, and end-user for the period 2021-2030 with forecast from 2024 to 2030 in terms of value in US\$. In addition to providing profiles of major companies operating in this space, the latest corporate and industrial developments have been covered to offer a clear panorama of how and where the market is progressing.

## Key Metrics

Historical Period: 2021-2023

Base Year: 2024

Forecast Period: 2024-2030

Units: Value market in US\$

Companies Mentioned: 15+

## Renal Dialysis Equipment Market by Geographic Region

North America (The United States, Canada, and Mexico)

Europe (Germany, France, the United Kingdom, Italy, Spain, and Rest of Europe)

Asia-Pacific (Japan, China, India, South Korea, and Rest of Asia-Pacific)

South America (Brazil, Argentina, and Rest of South America)

Rest of World

### Renal Dialysis Equipment Market by Product Type

Hemodialysis Equipment

Peritoneal Dialysis Equipment

Continuous Renal Replacement Therapy (CRRT) Equipment

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Allmed Group

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B. Braun SE

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Hemoclean Co., Ltd.

JMS Co. Ltd.

Medtronic plc

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