

Hemodialysis and Peritoneal Dialysis Market - Forecast from 2026 to 2031

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Abstracts

The hemodialysis and peritoneal dialysis market is expected to expand at a 6.59% CAGR, reaching USD 176.749 billion in 2031 from USD 120.545 billion in 2025.

The hemodialysis and peritoneal dialysis market is expanding rapidly driven by rising kidney-related illnesses, technological advancements, and evolving healthcare delivery models. Dialysis procedures—performed when kidneys cannot remove toxins from blood—encompass hemodialysis, a common blood cleaning procedure conducted at dialysis centers three to five times weekly through arm access, and peritoneal dialysis, a continuous home-based procedure that cleans the peritoneal cavity in the abdomen daily through abdominal access. The convergence of chronic disease prevalence, lifestyle factors, and technological innovation is propelling market growth.

Primary Market Drivers

Kidney Disease Burden and Risk Factors

Industry growth is attributed to surging kidney-related illnesses and concerns, as kidney transplantation requires major procedures, donor matching, and lifetime immunosuppressant medication regimens to prevent organ rejection. The rising incidence of chronic diseases and lifestyle-related illnesses including obesity, diabetes, and hypertension further supports worldwide market expansion.

In 2021, adults living with diabetes were most prevalent in the Western Pacific (167 million), South Asia (88 million), and Europe (59 million). End-stage renal disease cases are rising in correlation with increasing diabetes incidence. Additionally, kidney problems result from poor nutrition, unhealthy lifestyles, and lack of physical activity.

Lifestyle factors are responsible for 60% of health-related issues, including malnutrition, smoking, improper diet, drug misuse, stress, and alcohol consumption. These variables are causing ESRD instances to increase internationally, creating sustained demand for dialysis solutions.

Consumables Market Evolution

Throughout the projection period, governments are anticipated to make substantial expenditures improving patient safety, patient-centered treatment, and efficacy. Companies are producing catheters composed of complex materials impervious to chemicals like peroxides, iodine, and alcohol. New production techniques for dialyzers—featuring better surface contact and cutoff membrane properties for higher diffusion—positively affect consumables expansion, driving hemodialysis and peritoneal dialysis market growth. The consumables market encompasses bloodlines, concentrates, catheters, and related items, representing significant recurring revenue opportunities for manufacturers.

Hospital-Based Dialysis Dominance

Hospital-based dialysis dominance is projected to remain strong in upcoming years due to substantial availability of highly trained, experienced healthcare workers in hospital settings. In healthcare environments like dialysis centers and hospitals, qualified and skilled renal care teams guarantee optimal care and improved dialysis outcomes. Various factors—including competitors' increased focus on creating independent dialysis facilities and patients' growing acceptance of in-center dialysis—are projected to drive market growth. Companies are focusing on developing customized hemodialysis equipment with diverse interventions, addressing specific patient population needs and clinical scenarios.

Technological Advancement

Major factors influencing market growth include technological advancements in dialysis equipment and growing public awareness of treatment benefits. Hemodialysis machines with improved characteristics including portability, usability, and dependability are experiencing high demand. Hemodialysis technology availability for home use has increased patient satisfaction and offered greater independence. Peritoneal dialysis is gaining popularity as a cost-effective and practical alternative for patients, capable of being performed at home without specialized equipment. Additionally, automated peritoneal dialysis equipment availability is likely to fuel market growth, enabling

overnight treatments that minimize lifestyle disruption.

Regulatory Environment

Government regulations have been increasing globally, fueling market growth through quality standardization. Hemodialysis and peritoneal dialysis service providers must adhere to quality standards set by the Centres for Medicare & Medicaid Services. The FDA establishes requirements for medical devices regarding quality, safety, efficacy, and labeling. Before marketing in the European Union, medical devices must pass multiple tests guaranteeing quality and safety under the EU Medical Device Directive. In Japan, equipment must adhere to Ministry of Health, Labour, and Welfare regulations. China has enacted medical device laws following international and domestic standards, creating harmonized quality expectations across major markets.

Regional Dynamics

North American Market Leadership

The North American hemodialysis and peritoneal dialysis market is growing due to well-known manufacturers' presence, major government expenditures in cutting-edge medical device development, and supportive reimbursement frameworks. Dialysis prevalence is rising due to increasing kidney failures and Chronic Kidney Disease. Increasing healthcare spending, government initiatives, and high disposable income further promote market development.

Asia Pacific Growth Trajectory

The Asia Pacific region is anticipated to hold significant market share during the projected period. Increased development of cutting-edge products, expanding elderly populations, and rising renal failure occurrences are predicted to promote market growth. The IDF estimates 88 million individuals in Southeast Asia already have diabetes, with 153 million likely to have the disease by 2045. Increased government initiatives, CKD awareness programs, technologically advanced products, and recently built state-of-the-art healthcare facilities are influencing market growth.

Recent Developments

In April 2023, AWAK Technologies and Singapore General Hospital initiated a pre-pivotal clinical investigation of a wearable peritoneal dialysis device. Also in April 2023,

Tablo received FDA approval for usage in various locations including home and hospital settings, featuring user-friendly interactive touchscreens with 3-D graphics and conversational instructions. In February 2023, the first central government building for hemodialysis was fitted with online hemodiafiltration machines and inaugurated at Safdarjung Hospital in New Delhi, India.

The hemodialysis and peritoneal dialysis market continues evolving, driven by technological sophistication, chronic disease burden, and healthcare accessibility improvements.

Key Benefits of this Report:

Insightful Analysis: Gain detailed market insights covering major as well as emerging geographical regions, focusing on customer segments, government policies and socio-economic factors, consumer preferences, industry verticals, and other sub-segments.

Competitive Landscape: Understand the strategic maneuvers employed by key players globally to understand possible market penetration with the correct strategy.

Market Drivers & Future Trends: Explore the dynamic factors and pivotal market trends and how they will shape future market developments.

Actionable Recommendations: Utilize the insights to exercise strategic decisions to uncover new business streams and revenues in a dynamic environment.

Caters to a Wide Audience: Beneficial and cost-effective for startups, research institutions, consultants, SMEs, and large enterprises.

What do businesses use our reports for?

Industry and Market Insights, Opportunity Assessment, Product Demand Forecasting, Market Entry Strategy, Geographical Expansion, Capital Investment Decisions, Regulatory Framework & Implications, New Product Development, Competitive Intelligence

Report Coverage:

Historical data from 2021 to 2025 & forecast data from 2026 to 2031

Growth Opportunities, Challenges, Supply Chain Outlook, Regulatory Framework, and Trend Analysis

Competitive Positioning, Strategies, and Market Share Analysis

Revenue Growth and Forecast Assessment of segments and regions including countries

Company Profiling (Strategies, Products, Financial Information, and Key Developments among others.

Hemodialysis and Peritoneal Dialysis Market Segmentation

By Type

Hemodialysis

Peritoneal dialysis

By Product

Device

Consumables

By End-User

Home-based

Hospital-based

By Geography

North America

United States

Canada

Mexico

South America

Brazil

Argentina

Others

Europe

Germany

France

United Kingdom

Spain

Others

Middle East and Africa

Saudi Arabia

UAE

Others

Asia Pacific

China

India

Japan

South Korea

Indonesia

Thailand

Others

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