

Global Home Dialysis Consumables Market Growth (Status and Outlook) 2026-2032

<https://marketpublishers.com/r/G52C5FA966A3EN.html>

Date: July 2026

Pages: 152

Price: US\$ 3,660.00 (Single User License)

ID: G52C5FA966A3EN

Abstracts

The global Home Dialysis Consumables market size is predicted to grow from US\$ 7435 million in 2025 to US\$ 12067 million in 2032; it is expected to grow at a CAGR of 7.3% from 2026 to 2032.

Home Dialysis Consumables refer to medical supplies that are continuously consumed, periodically replaced, or used once during dialysis treatment performed in a home setting by patients with end-stage kidney disease or acute kidney injury. The category mainly covers two treatment settings: peritoneal dialysis and home hemodialysis. The product scope includes peritoneal dialysis solutions, PD bag systems, APD disposable cassettes and tubing sets, transfer sets, drainage bags, catheter care supplies, disinfection caps, dressings, gloves, alcohol wipes, as well as home hemodialysis consumables such as dialyzers, blood tubing sets, dialysis needles, syringes, saline, dialysate concentrates, disinfection supplies, and water-quality testing consumables. This category focuses on consumable products used during treatment and excludes peritoneal dialysis cyclers, home hemodialysis machines, water treatment systems, furniture, equipment installation and maintenance, patient training, physician services, home nursing visits, and reimbursement payments. Home dialysis consumables are typically supplied to the patient's home by dialysis centers, medical device companies, or specialized distribution systems based on prescriptions and treatment frequency, and are mainly used in long-term renal replacement therapy, nocturnal automated peritoneal dialysis, short and frequent home hemodialysis, and continuous home-based management of chronic kidney disease patients. The National Kidney Foundation identifies home dialysis as including home hemodialysis and peritoneal dialysis, while Medicare separates home dialysis equipment, supplies, and support services, which supports a clearly defined consumables-only research scope.

In 2025, global Home Dialysis Consumables production reached approximately 0.52 million to 0.57 million patient-year equivalent treatment consumable sets, mainly including peritoneal dialysis solutions and bag systems, APD disposable cassettes and tubing sets, dialyzers, blood tubing sets, dialysis needles, drainage bags, transfer sets, disinfection caps, and catheter care supplies. The global average FOB price was approximately USD 12,800 to USD 15,300 per patient-year equivalent treatment consumable set. With broader adoption of peritoneal dialysis and home hemodialysis in long-term chronic kidney disease management, home-based treatment, nocturnal automated peritoneal dialysis, remote patient management, and household delivery systems are expected to support steady demand growth for this consumables category.

Global renal replacement therapy is shifting from a single facility-centered model toward a combined structure of in-center dialysis, home-based treatment, and remote patient management, making home dialysis consumables one of the most recurring-demand product groups in the dialysis value chain. Market growth is supported by the expanding chronic kidney disease population, increasing long-term treatment demand among patients with kidney failure, pressure on healthcare systems to optimize in-center dialysis capacity, rising patient preference for flexibility and quality of life, and continued institutional support for home-based care models. Compared with capital equipment such as dialysis machines, home dialysis consumables are more closely linked to prescription frequency and repeat usage. Peritoneal dialysis solutions, bag systems, APD tubing and cassette sets, dialyzers, blood tubing, and vascular access consumables are directly tied to patient prescriptions, exchange frequency, treatment duration, and therapy adherence. As automated peritoneal dialysis, nocturnal treatment, remote monitoring, and home supply-chain management continue to mature, supplier competition is moving beyond basic product availability toward prescription compatibility, packaging convenience, sterile safety, infection control, patient-friendly operation, and delivery reliability. Fresenius Medical Care's peritoneal dialysis portfolio, which covers CAPD, APD, bag systems, APD cyclers, and multiple dialysis fluids, reflects the growing importance of integrated product portfolios and home-treatment adaptability in this market.

Key market challenges include patient training requirements, home storage limitations, infection-control risks, cold-chain and heavy-goods delivery costs, regional differences in reimbursement, and varying regulatory requirements for dialysis fluids, disposable tubing, disinfection products, and water-related consumables. Peritoneal dialysis consumables require strong capabilities in sterile filling, flexible bag materials, connection systems, and sterilized packaging, while home hemodialysis consumables require reliable dialyzer performance, blood tubing safety, needle quality, and stable

water-quality support materials. Future demand is expected to expand around elderly patients, diabetic kidney disease patients, regions with stronger home-care capability, markets with mature telehealth infrastructure, and healthcare systems that actively support home dialysis adoption. Product innovation will increasingly favor low-infection-risk connection systems, pre-connected bag systems, lightweight tubing, convenient effluent handling supplies, traceable packaging, and bundled consumable kits suitable for monthly or bi-monthly home delivery. The home dialysis consumables market is therefore not simply a volume expansion story for individual supplies, but a recurring medical consumables market shaped by long-term chronic care, migration of treatment into the home, prescription-based product supply, and resilient distribution networks.

LPI (LP Information)' newest research report, the 'Home Dialysis Consumables Industry Forecast' looks at past sales and reviews total world Home Dialysis Consumables sales in 2025, providing a comprehensive analysis by region and market sector of projected Home Dialysis Consumables sales for 2026 through 2032. With Home Dialysis Consumables sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Home Dialysis Consumables industry.

This Insight Report provides a comprehensive analysis of the global Home Dialysis Consumables landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Home Dialysis Consumables portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Home Dialysis Consumables market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Home Dialysis Consumables and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Home Dialysis Consumables.

This report presents a comprehensive overview, market shares, and growth opportunities of Home Dialysis Consumables market by product type, application, key players and key regions and countries.

Segmentation by Type:

Dialysis Fluids & Solutions

Tubing Sets & Lines

Catheters & Access Devices

Others

Segmentation by Care / Assistance Level:

Self Care (Patient Operated)

Assisted Dialysis (Caregiver or Nurse Assisted)

Fully Remote Monitored

Segmentation by Patient Group:

Adult Chronic Kidney Failure Patients

Elderly and High Comorbidity Patients

Pediatric and Low Body Weight Patients

Segmentation by End User Setting:

Private Residence

Residential Care Home (Group Home)

Segmentation by Application:

Peritoneal Dialysis

Hemodialysis

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

Vantive

Fresenius Medical Care AG

B. Braun SE

Nipro Corporation

JMS Co., Ltd.

Asahi Kasei Medical Co., Ltd.

Toray Medical Co., Ltd.

Nikkiso Co., Ltd.

Outset Medical, Inc.

Quanta Dialysis Technologies Ltd.

Medica S.p.A.

Poly Medicure Limited

Mitra Industries Private Limited

Suru International Private Limited

WEGO Group

Huaren Pharmaceutical Co., Ltd.

Sichuan Kelun Pharmaceutical Co., Ltd.

Jiangxi Sanxin Medtec Co., Ltd.

Bain Medical Equipment Guangzhou Co., Ltd.

Renax Biomedical Technology Co., Ltd.

Bioteque Corporation

Synopex Inc.

Hemoclean Co., Ltd.

Vital Healthcare Sdn. Bhd.

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global Home Dialysis Consumables Market Size (2021-2032)
 - 2.1.2 Home Dialysis Consumables Market Size CAGR by Region (2021 VS 2025 VS 2032)
 - 2.1.3 World Current & Future Analysis for Home Dialysis Consumables by Country/Region (2021, 2025 & 2032)
- 2.2 Home Dialysis Consumables Segment by Type
 - 2.2.1 Dialysis Fluids & Solutions
 - 2.2.2 Tubing Sets & Lines
 - 2.2.3 Catheters & Access Devices
 - 2.2.4 Others
 - 2.2.5 Home Dialysis Consumables Market Size by Type
 - 2.2.5.1 Home Dialysis Consumables Market Size CAGR by Type (2021 VS 2025 VS 2032)
 - 2.2.5.2 Global Home Dialysis Consumables Market Size Market Share by Type (2021-2026)
- 2.3 Home Dialysis Consumables Segment by Care / Assistance Level
 - 2.3.1 Self Care (Patient Operated)
 - 2.3.2 Assisted Dialysis (Caregiver or Nurse Assisted)
 - 2.3.3 Fully Remote Monitored
 - 2.3.4 Home Dialysis Consumables Market Size by Care / Assistance Level
 - 2.3.4.1 Home Dialysis Consumables Market Size CAGR by Care / Assistance Level (2021 VS 2025 VS 2032)
 - 2.3.4.2 Global Home Dialysis Consumables Market Size Market Share by Care /

Assistance Level (2021-2026)

2.4 Home Dialysis Consumables Segment by Patient Group

2.4.1 Adult Chronic Kidney Failure Patients

2.4.2 Elderly and High Comorbidity Patients

2.4.3 Pediatric and Low Body Weight Patients

2.4.4 Home Dialysis Consumables Market Size by Patient Group

2.4.4.1 Home Dialysis Consumables Market Size CAGR by Patient Group (2021 VS 2025 VS 2032)

2.4.4.2 Global Home Dialysis Consumables Market Size Market Share by Patient Group (2021-2026)

2.5 Home Dialysis Consumables Segment by End User Setting

2.5.1 Private Residence

2.5.2 Residential Care Home (Group Home)

2.5.3 Home Dialysis Consumables Market Size by End User Setting

2.5.3.1 Home Dialysis Consumables Market Size CAGR by End User Setting (2021 VS 2025 VS 2032)

2.5.3.2 Global Home Dialysis Consumables Market Size Market Share by End User Setting (2021-2026)

2.6 Home Dialysis Consumables Segment by Application

2.6.1 Peritoneal Dialysis

2.6.2 Hemodialysis

2.6.3 Home Dialysis Consumables Market Size by Application

2.6.3.1 Home Dialysis Consumables Market Size CAGR by Application (2021 VS 2025 VS 2032)

2.6.3.2 Global Home Dialysis Consumables Market Size Market Share by Application (2021-2026)

3 HOME DIALYSIS CONSUMABLES MARKET SIZE BY PLAYER

3.1 Home Dialysis Consumables Market Size Market Share by Player

3.1.1 Global Home Dialysis Consumables Revenue by Player (2021-2026)

3.1.2 Global Home Dialysis Consumables Revenue Market Share by Player (2021-2026)

3.2 Global Home Dialysis Consumables Key Players Head office and Products Offered

3.3 Market Concentration Rate Analysis

3.3.1 Competition Landscape Analysis

3.3.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.4 New Products and Potential Entrants

3.5 Mergers & Acquisitions, Expansion

4 HOME DIALYSIS CONSUMABLES BY REGION

- 4.1 Home Dialysis Consumables Market Size by Region (2021-2026)
- 4.2 Global Home Dialysis Consumables Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas Home Dialysis Consumables Market Size Growth (2021-2026)
- 4.4 APAC Home Dialysis Consumables Market Size Growth (2021-2026)
- 4.5 Europe Home Dialysis Consumables Market Size Growth (2021-2026)
- 4.6 Middle East & Africa Home Dialysis Consumables Market Size Growth (2021-2026)

5 AMERICAS

- 5.1 Americas Home Dialysis Consumables Market Size by Country (2021-2026)
- 5.2 Americas Home Dialysis Consumables Market Size by Type (2021-2026)
- 5.3 Americas Home Dialysis Consumables Market Size by Application (2021-2026)
- 5.4 United States
- 5.5 Canada
- 5.6 Mexico
- 5.7 Brazil

6 APAC

- 6.1 APAC Home Dialysis Consumables Market Size by Region (2021-2026)
- 6.2 APAC Home Dialysis Consumables Market Size by Type (2021-2026)
- 6.3 APAC Home Dialysis Consumables Market Size by Application (2021-2026)
- 6.4 China
- 6.5 Japan
- 6.6 South Korea
- 6.7 Southeast Asia
- 6.8 India
- 6.9 Australia

7 EUROPE

- 7.1 Europe Home Dialysis Consumables Market Size by Country (2021-2026)
- 7.2 Europe Home Dialysis Consumables Market Size by Type (2021-2026)
- 7.3 Europe Home Dialysis Consumables Market Size by Application (2021-2026)
- 7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Home Dialysis Consumables by Region (2021-2026)

8.2 Middle East & Africa Home Dialysis Consumables Market Size by Type (2021-2026)

8.3 Middle East & Africa Home Dialysis Consumables Market Size by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 GLOBAL HOME DIALYSIS CONSUMABLES MARKET FORECAST

10.1 Global Home Dialysis Consumables Forecast by Region (2027-2032)

10.1.1 Global Home Dialysis Consumables Forecast by Region (2027-2032)

10.1.2 Americas Home Dialysis Consumables Forecast

10.1.3 APAC Home Dialysis Consumables Forecast

10.1.4 Europe Home Dialysis Consumables Forecast

10.1.5 Middle East & Africa Home Dialysis Consumables Forecast

10.2 Americas Home Dialysis Consumables Forecast by Country (2027-2032)

10.2.1 United States Market Home Dialysis Consumables Forecast

10.2.2 Canada Market Home Dialysis Consumables Forecast

10.2.3 Mexico Market Home Dialysis Consumables Forecast

10.2.4 Brazil Market Home Dialysis Consumables Forecast

10.3 APAC Home Dialysis Consumables Forecast by Region (2027-2032)

10.3.1 China Home Dialysis Consumables Market Forecast

10.3.2 Japan Market Home Dialysis Consumables Forecast

- 10.3.3 Korea Market Home Dialysis Consumables Forecast
- 10.3.4 Southeast Asia Market Home Dialysis Consumables Forecast
- 10.3.5 India Market Home Dialysis Consumables Forecast
- 10.3.6 Australia Market Home Dialysis Consumables Forecast
- 10.4 Europe Home Dialysis Consumables Forecast by Country (2027-2032)
 - 10.4.1 Germany Market Home Dialysis Consumables Forecast
 - 10.4.2 France Market Home Dialysis Consumables Forecast
 - 10.4.3 UK Market Home Dialysis Consumables Forecast
 - 10.4.4 Italy Market Home Dialysis Consumables Forecast
 - 10.4.5 Russia Market Home Dialysis Consumables Forecast
- 10.5 Middle East & Africa Home Dialysis Consumables Forecast by Region (2027-2032)
 - 10.5.1 Egypt Market Home Dialysis Consumables Forecast
 - 10.5.2 South Africa Market Home Dialysis Consumables Forecast
 - 10.5.3 Israel Market Home Dialysis Consumables Forecast
 - 10.5.4 Turkey Market Home Dialysis Consumables Forecast
- 10.6 Global Home Dialysis Consumables Forecast by Type (2027-2032)
- 10.7 Global Home Dialysis Consumables Forecast by Application (2027-2032)
 - 10.7.1 GCC Countries Market Home Dialysis Consumables Forecast

11 KEY PLAYERS ANALYSIS

11.1 Vantive

- 11.1.1 Vantive Company Information
- 11.1.2 Vantive Home Dialysis Consumables Product Offered
- 11.1.3 Vantive Home Dialysis Consumables Revenue, Gross Margin and Market Share (2021-2026)
- 11.1.4 Vantive Main Business Overview
- 11.1.5 Vantive Latest Developments

11.2 Fresenius Medical Care AG

- 11.2.1 Fresenius Medical Care AG Company Information
- 11.2.2 Fresenius Medical Care AG Home Dialysis Consumables Product Offered
- 11.2.3 Fresenius Medical Care AG Home Dialysis Consumables Revenue, Gross Margin and Market Share (2021-2026)
- 11.2.4 Fresenius Medical Care AG Main Business Overview
- 11.2.5 Fresenius Medical Care AG Latest Developments

11.3 B. Braun SE

- 11.3.1 B. Braun SE Company Information
- 11.3.2 B. Braun SE Home Dialysis Consumables Product Offered
- 11.3.3 B. Braun SE Home Dialysis Consumables Revenue, Gross Margin and Market

Share (2021-2026)

11.3.4 B. Braun SE Main Business Overview

11.3.5 B. Braun SE Latest Developments

11.4 Nipro Corporation

11.4.1 Nipro Corporation Company Information

11.4.2 Nipro Corporation Home Dialysis Consumables Product Offered

11.4.3 Nipro Corporation Home Dialysis Consumables Revenue, Gross Margin and

Market Share (2021-2026)

11.4.4 Nipro Corporation Main Business Overview

11.4.5 Nipro Corporation Latest Developments

11.5 JMS Co., Ltd.

11.5.1 JMS Co., Ltd. Company Information

11.5.2 JMS Co., Ltd. Home Dialysis Consumables Product Offered

11.5.3 JMS Co., Ltd. Home Dialysis Consumables Revenue, Gross Margin and Market

Share (2021-2026)

11.5.4 JMS Co., Ltd. Main Business Overview

11.5.5 JMS Co., Ltd. Latest Developments

11.6 Asahi Kasei Medical Co., Ltd.

11.6.1 Asahi Kasei Medical Co., Ltd. Company Information

11.6.2 Asahi Kasei Medical Co., Ltd. Home Dialysis Consumables Product Offered

11.6.3 Asahi Kasei Medical Co., Ltd. Home Dialysis Consumables Revenue, Gross

Margin and Market Share (2021-2026)

11.6.4 Asahi Kasei Medical Co., Ltd. Main Business Overview

11.6.5 Asahi Kasei Medical Co., Ltd. Latest Developments

11.7 Toray Medical Co., Ltd.

11.7.1 Toray Medical Co., Ltd. Company Information

11.7.2 Toray Medical Co., Ltd. Home Dialysis Consumables Product Offered

11.7.3 Toray Medical Co., Ltd. Home Dialysis Consumables Revenue, Gross Margin

and Market Share (2021-2026)

11.7.4 Toray Medical Co., Ltd. Main Business Overview

11.7.5 Toray Medical Co., Ltd. Latest Developments

11.8 Nikkiso Co., Ltd.

11.8.1 Nikkiso Co., Ltd. Company Information

11.8.2 Nikkiso Co., Ltd. Home Dialysis Consumables Product Offered

11.8.3 Nikkiso Co., Ltd. Home Dialysis Consumables Revenue, Gross Margin and

Market Share (2021-2026)

11.8.4 Nikkiso Co., Ltd. Main Business Overview

11.8.5 Nikkiso Co., Ltd. Latest Developments

11.9 Outset Medical, Inc.

- 11.9.1 Outset Medical, Inc. Company Information
- 11.9.2 Outset Medical, Inc. Home Dialysis Consumables Product Offered
- 11.9.3 Outset Medical, Inc. Home Dialysis Consumables Revenue, Gross Margin and Market Share (2021-2026)
- 11.9.4 Outset Medical, Inc. Main Business Overview
- 11.9.5 Outset Medical, Inc. Latest Developments
- 11.10 Quanta Dialysis Technologies Ltd.
 - 11.10.1 Quanta Dialysis Technologies Ltd. Company Information
 - 11.10.2 Quanta Dialysis Technologies Ltd. Home Dialysis Consumables Product Offered
 - 11.10.3 Quanta Dialysis Technologies Ltd. Home Dialysis Consumables Revenue, Gross Margin and Market Share (2021-2026)
 - 11.10.4 Quanta Dialysis Technologies Ltd. Main Business Overview
 - 11.10.5 Quanta Dialysis Technologies Ltd. Latest Developments
- 11.11 Medica S.p.A.
 - 11.11.1 Medica S.p.A. Company Information
 - 11.11.2 Medica S.p.A. Home Dialysis Consumables Product Offered
 - 11.11.3 Medica S.p.A. Home Dialysis Consumables Revenue, Gross Margin and Market Share (2021-2026)
 - 11.11.4 Medica S.p.A. Main Business Overview
 - 11.11.5 Medica S.p.A. Latest Developments
- 11.12 Poly Medicure Limited
 - 11.12.1 Poly Medicure Limited Company Information
 - 11.12.2 Poly Medicure Limited Home Dialysis Consumables Product Offered
 - 11.12.3 Poly Medicure Limited Home Dialysis Consumables Revenue, Gross Margin and Market Share (2021-2026)
 - 11.12.4 Poly Medicure Limited Main Business Overview
 - 11.12.5 Poly Medicure Limited Latest Developments
- 11.13 Mitra Industries Private Limited
 - 11.13.1 Mitra Industries Private Limited Company Information
 - 11.13.2 Mitra Industries Private Limited Home Dialysis Consumables Product Offered
 - 11.13.3 Mitra Industries Private Limited Home Dialysis Consumables Revenue, Gross Margin and Market Share (2021-2026)
 - 11.13.4 Mitra Industries Private Limited Main Business Overview
 - 11.13.5 Mitra Industries Private Limited Latest Developments
- 11.14 Suru International Private Limited
 - 11.14.1 Suru International Private Limited Company Information
 - 11.14.2 Suru International Private Limited Home Dialysis Consumables Product Offered

11.14.3 Suru International Private Limited Home Dialysis Consumables Revenue, Gross Margin and Market Share (2021-2026)

11.14.4 Suru International Private Limited Main Business Overview

11.14.5 Suru International Private Limited Latest Developments

11.15 WEGO Group

11.15.1 WEGO Group Company Information

11.15.2 WEGO Group Home Dialysis Consumables Product Offered

11.15.3 WEGO Group Home Dialysis Consumables Revenue, Gross Margin and Market Share (2021-2026)

11.15.4 WEGO Group Main Business Overview

11.15.5 WEGO Group Latest Developments

11.16 Huaren Pharmaceutical Co., Ltd.

11.16.1 Huaren Pharmaceutical Co., Ltd. Company Information

11.16.2 Huaren Pharmaceutical Co., Ltd. Home Dialysis Consumables Product Offered

11.16.3 Huaren Pharmaceutical Co., Ltd. Home Dialysis Consumables Revenue, Gross Margin and Market Share (2021-2026)

11.16.4 Huaren Pharmaceutical Co., Ltd. Main Business Overview

11.16.5 Huaren Pharmaceutical Co., Ltd. Latest Developments

11.17 Sichuan Kelun Pharmaceutical Co., Ltd.

11.17.1 Sichuan Kelun Pharmaceutical Co., Ltd. Company Information

11.17.2 Sichuan Kelun Pharmaceutical Co., Ltd. Home Dialysis Consumables Product Offered

11.17.3 Sichuan Kelun Pharmaceutical Co., Ltd. Home Dialysis Consumables Revenue, Gross Margin and Market Share (2021-2026)

11.17.4 Sichuan Kelun Pharmaceutical Co., Ltd. Main Business Overview

11.17.5 Sichuan Kelun Pharmaceutical Co., Ltd. Latest Developments

11.18 Jiangxi Sanxin Medtec Co., Ltd.

11.18.1 Jiangxi Sanxin Medtec Co., Ltd. Company Information

11.18.2 Jiangxi Sanxin Medtec Co., Ltd. Home Dialysis Consumables Product Offered

11.18.3 Jiangxi Sanxin Medtec Co., Ltd. Home Dialysis Consumables Revenue, Gross Margin and Market Share (2021-2026)

11.18.4 Jiangxi Sanxin Medtec Co., Ltd. Main Business Overview

11.18.5 Jiangxi Sanxin Medtec Co., Ltd. Latest Developments

11.19 Bain Medical Equipment Guangzhou Co., Ltd.

11.19.1 Bain Medical Equipment Guangzhou Co., Ltd. Company Information

11.19.2 Bain Medical Equipment Guangzhou Co., Ltd. Home Dialysis Consumables Product Offered

11.19.3 Bain Medical Equipment Guangzhou Co., Ltd. Home Dialysis Consumables

Revenue, Gross Margin and Market Share (2021-2026)

11.19.4 Bain Medical Equipment Guangzhou Co., Ltd. Main Business Overview

11.19.5 Bain Medical Equipment Guangzhou Co., Ltd. Latest Developments

11.20 Renax Biomedical Technology Co., Ltd.

11.20.1 Renax Biomedical Technology Co., Ltd. Company Information

11.20.2 Renax Biomedical Technology Co., Ltd. Home Dialysis Consumables Product Offered

11.20.3 Renax Biomedical Technology Co., Ltd. Home Dialysis Consumables

Revenue, Gross Margin and Market Share (2021-2026)

11.20.4 Renax Biomedical Technology Co., Ltd. Main Business Overview

11.20.5 Renax Biomedical Technology Co., Ltd. Latest Developments

11.21 Bioteque Corporation

11.21.1 Bioteque Corporation Company Information

11.21.2 Bioteque Corporation Home Dialysis Consumables Product Offered

11.21.3 Bioteque Corporation Home Dialysis Consumables Revenue, Gross Margin and Market Share (2021-2026)

11.21.4 Bioteque Corporation Main Business Overview

11.21.5 Bioteque Corporation Latest Developments

11.22 Synopex Inc.

11.22.1 Synopex Inc. Company Information

11.22.2 Synopex Inc. Home Dialysis Consumables Product Offered

11.22.3 Synopex Inc. Home Dialysis Consumables Revenue, Gross Margin and Market Share (2021-2026)

11.22.4 Synopex Inc. Main Business Overview

11.22.5 Synopex Inc. Latest Developments

11.23 Hemoclean Co., Ltd.

11.23.1 Hemoclean Co., Ltd. Company Information

11.23.2 Hemoclean Co., Ltd. Home Dialysis Consumables Product Offered

11.23.3 Hemoclean Co., Ltd. Home Dialysis Consumables Revenue, Gross Margin and Market Share (2021-2026)

11.23.4 Hemoclean Co., Ltd. Main Business Overview

11.23.5 Hemoclean Co., Ltd. Latest Developments

11.24 Vital Healthcare Sdn. Bhd.

11.24.1 Vital Healthcare Sdn. Bhd. Company Information

11.24.2 Vital Healthcare Sdn. Bhd. Home Dialysis Consumables Product Offered

11.24.3 Vital Healthcare Sdn. Bhd. Home Dialysis Consumables Revenue, Gross Margin and Market Share (2021-2026)

11.24.4 Vital Healthcare Sdn. Bhd. Main Business Overview

11.24.5 Vital Healthcare Sdn. Bhd. Latest Developments

12 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Home Dialysis Consumables Market Size CAGR by Region (2021 VS 2025 VS 2032) & (\$ millions)

Table 2. Home Dialysis Consumables Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Dialysis Fluids & Solutions

Table 4. Major Players of Tubing Sets & Lines

Table 5. Major Players of Catheters & Access Devices

Table 6. Major Players of Others

Table 7. Home Dialysis Consumables Market Size CAGR by Type (2021 VS 2025 VS 2032) & (\$ millions)

Table 8. Global Home Dialysis Consumables Market Size by Type (2021-2026) & (\$ millions)

Table 9. Global Home Dialysis Consumables Market Size Market Share by Type (2021-2026)

Table 10. Major Players of Self Care (Patient Operated)

Table 11. Major Players of Assisted Dialysis (Caregiver or Nurse Assisted)

Table 12. Major Players of Fully Remote Monitored

Table 13. Home Dialysis Consumables Market Size CAGR by Care / Assistance Level (2021 VS 2025 VS 2032) & (\$ millions)

Table 14. Global Home Dialysis Consumables Market Size by Care / Assistance Level (2021-2026) & (\$ millions)

Table 15. Global Home Dialysis Consumables Market Size Market Share by Care / Assistance Level (2021-2026)

Table 16. Major Players of Adult Chronic Kidney Failure Patients

Table 17. Major Players of Elderly and High Comorbidity Patients

Table 18. Major Players of Pediatric and Low Body Weight Patients

Table 19. Home Dialysis Consumables Market Size CAGR by Patient Group (2021 VS 2025 VS 2032) & (\$ millions)

Table 20. Global Home Dialysis Consumables Market Size by Patient Group (2021-2026) & (\$ millions)

Table 21. Global Home Dialysis Consumables Market Size Market Share by Patient Group (2021-2026)

Table 22. Major Players of Private Residence

Table 23. Major Players of Residential Care Home (Group Home)

Table 24. Home Dialysis Consumables Market Size CAGR by End User Setting (2021

VS 2025 VS 2032) & (\$ millions)

Table 25. Global Home Dialysis Consumables Market Size by End User Setting (2021-2026) & (\$ millions)

Table 26. Global Home Dialysis Consumables Market Size Market Share by End User Setting (2021-2026)

Table 27. Home Dialysis Consumables Market Size CAGR by Application (2021 VS 2025 VS 2032) & (\$ millions)

Table 28. Global Home Dialysis Consumables Market Size by Application (2021-2026) & (\$ millions)

Table 29. Global Home Dialysis Consumables Market Size Market Share by Application (2021-2026)

Table 30. Global Home Dialysis Consumables Revenue by Player (2021-2026) & (\$ millions)

Table 31. Global Home Dialysis Consumables Revenue Market Share by Player (2021-2026)

Table 32. Home Dialysis Consumables Key Players Head office and Products Offered

Table 33. Home Dialysis Consumables Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 34. New Products and Potential Entrants

Table 35. Mergers & Acquisitions, Expansion

Table 36. Global Home Dialysis Consumables Market Size by Region (2021-2026) & (\$ millions)

Table 37. Global Home Dialysis Consumables Market Size Market Share by Region (2021-2026)

Table 38. Global Home Dialysis Consumables Revenue by Country/Region (2021-2026) & (\$ millions)

Table 39. Global Home Dialysis Consumables Revenue Market Share by Country/Region (2021-2026)

Table 40. Americas Home Dialysis Consumables Market Size by Country (2021-2026) & (\$ millions)

Table 41. Americas Home Dialysis Consumables Market Size Market Share by Country (2021-2026)

Table 42. Americas Home Dialysis Consumables Market Size by Type (2021-2026) & (\$ millions)

Table 43. Americas Home Dialysis Consumables Market Size Market Share by Type (2021-2026)

Table 44. Americas Home Dialysis Consumables Market Size by Application (2021-2026) & (\$ millions)

Table 45. Americas Home Dialysis Consumables Market Size Market Share by

Application (2021-2026)

Table 46. APAC Home Dialysis Consumables Market Size by Region (2021-2026) & (\$ millions)

Table 47. APAC Home Dialysis Consumables Market Size Market Share by Region (2021-2026)

Table 48. APAC Home Dialysis Consumables Market Size by Type (2021-2026) & (\$ millions)

Table 49. APAC Home Dialysis Consumables Market Size by Application (2021-2026) & (\$ millions)

Table 50. Europe Home Dialysis Consumables Market Size by Country (2021-2026) & (\$ millions)

Table 51. Europe Home Dialysis Consumables Market Size Market Share by Country (2021-2026)

Table 52. Europe Home Dialysis Consumables Market Size by Type (2021-2026) & (\$ millions)

Table 53. Europe Home Dialysis Consumables Market Size by Application (2021-2026) & (\$ millions)

Table 54. Middle East & Africa Home Dialysis Consumables Market Size by Region (2021-2026) & (\$ millions)

Table 55. Middle East & Africa Home Dialysis Consumables Market Size by Type (2021-2026) & (\$ millions)

Table 56. Middle East & Africa Home Dialysis Consumables Market Size by Application (2021-2026) & (\$ millions)

Table 57. Key Market Drivers & Growth Opportunities of Home Dialysis Consumables

Table 58. Key Market Challenges & Risks of Home Dialysis Consumables

Table 59. Key Industry Trends of Home Dialysis Consumables

Table 60. Global Home Dialysis Consumables Market Size Forecast by Region (2027-2032) & (\$ millions)

Table 61. Global Home Dialysis Consumables Market Size Market Share Forecast by Region (2027-2032)

Table 62. Global Home Dialysis Consumables Market Size Forecast by Type (2027-2032) & (\$ millions)

Table 63. Global Home Dialysis Consumables Market Size Forecast by Application (2027-2032) & (\$ millions)

Table 64. Vantive Details, Company Type, Home Dialysis Consumables Area Served and Its Competitors

Table 65. Vantive Home Dialysis Consumables Product Offered

Table 66. Vantive Home Dialysis Consumables Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 67. Vantive Main Business
Table 68. Vantive Latest Developments
Table 69. Fresenius Medical Care AG Details, Company Type, Home Dialysis Consumables Area Served and Its Competitors
Table 70. Fresenius Medical Care AG Home Dialysis Consumables Product Offered
Table 71. Fresenius Medical Care AG Home Dialysis Consumables Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 72. Fresenius Medical Care AG Main Business
Table 73. Fresenius Medical Care AG Latest Developments
Table 74. B. Braun SE Details, Company Type, Home Dialysis Consumables Area Served and Its Competitors
Table 75. B. Braun SE Home Dialysis Consumables Product Offered
Table 76. B. Braun SE Home Dialysis Consumables Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 77. B. Braun SE Main Business
Table 78. B. Braun SE Latest Developments
Table 79. Nipro Corporation Details, Company Type, Home Dialysis Consumables Area Served and Its Competitors
Table 80. Nipro Corporation Home Dialysis Consumables Product Offered
Table 81. Nipro Corporation Home Dialysis Consumables Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 82. Nipro Corporation Main Business
Table 83. Nipro Corporation Latest Developments
Table 84. JMS Co., Ltd. Details, Company Type, Home Dialysis Consumables Area Served and Its Competitors
Table 85. JMS Co., Ltd. Home Dialysis Consumables Product Offered
Table 86. JMS Co., Ltd. Home Dialysis Consumables Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 87. JMS Co., Ltd. Main Business
Table 88. JMS Co., Ltd. Latest Developments
Table 89. Asahi Kasei Medical Co., Ltd. Details, Company Type, Home Dialysis Consumables Area Served and Its Competitors
Table 90. Asahi Kasei Medical Co., Ltd. Home Dialysis Consumables Product Offered
Table 91. Asahi Kasei Medical Co., Ltd. Home Dialysis Consumables Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 92. Asahi Kasei Medical Co., Ltd. Main Business
Table 93. Asahi Kasei Medical Co., Ltd. Latest Developments
Table 94. Toray Medical Co., Ltd. Details, Company Type, Home Dialysis Consumables Area Served and Its Competitors

Table 95. Toray Medical Co., Ltd. Home Dialysis Consumables Product Offered
Table 96. Toray Medical Co., Ltd. Home Dialysis Consumables Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 97. Toray Medical Co., Ltd. Main Business
Table 98. Toray Medical Co., Ltd. Latest Developments
Table 99. Nikkiso Co., Ltd. Details, Company Type, Home Dialysis Consumables Area Served and Its Competitors
Table 100. Nikkiso Co., Ltd. Home Dialysis Consumables Product Offered
Table 101. Nikkiso Co., Ltd. Home Dialysis Consumables Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 102. Nikkiso Co., Ltd. Main Business
Table 103. Nikkiso Co., Ltd. Latest Developments
Table 104. Outset Medical, Inc. Details, Company Type, Home Dialysis Consumables Area Served and Its Competitors
Table 105. Outset Medical, Inc. Home Dialysis Consumables Product Offered
Table 106. Outset Medical, Inc. Home Dialysis Consumables Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 107. Outset Medical, Inc. Main Business
Table 108. Outset Medical, Inc. Latest Developments
Table 109. Quanta Dialysis Technologies Ltd. Details, Company Type, Home Dialysis Consumables Area Served and Its Competitors
Table 110. Quanta Dialysis Technologies Ltd. Home Dialysis Consumables Product Offered
Table 111. Quanta Dialysis Technologies Ltd. Home Dialysis Consumables Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 112. Quanta Dialysis Technologies Ltd. Main Business
Table 113. Quanta Dialysis Technologies Ltd. Latest Developments
Table 114. Medica S.p.A. Details, Company Type, Home Dialysis Consumables Area Served and Its Competitors
Table 115. Medica S.p.A. Home Dialysis Consumables Product Offered
Table 116. Medica S.p.A. Home Dialysis Consumables Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 117. Medica S.p.A. Main Business
Table 118. Medica S.p.A. Latest Developments
Table 119. Poly Medicure Limited Details, Company Type, Home Dialysis Consumables Area Served and Its Competitors
Table 120. Poly Medicure Limited Home Dialysis Consumables Product Offered
Table 121. Poly Medicure Limited Home Dialysis Consumables Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 122. Poly Medicure Limited Main Business

Table 123. Poly Medicure Limited Latest Developments

Table 124. Mitra Industries Private Limited Details, Company Type, Home Dialysis Consumables Area Served and Its Competitors

Table 125. Mitra Industries Private Limited Home Dialysis Consumables Product Offered

Table 126. Mitra Industries Private Limited Home Dialysis Consumables Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 127. Mitra Industries Private Limited Main Business

Table 128. Mitra Industries Private Limited Latest Developments

Table 129. Suru International Private Limited Details, Company Type, Home Dialysis Consumables Area Served and Its Competitors

Table 130. Suru International Private Limited Home Dialysis Consumables Product Offered

Table 131. Suru International Private Limited Home Dialysis Consumables Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 132. Suru International Private Limited Main Business

Table 133. Suru International Private Limited Latest Developments

Table 134. WEGO Group Details, Company Type, Home Dialysis Consumables Area Served and Its Competitors

Table 135. WEGO Group Home Dialysis Consumables Product Offered

Table 136. WEGO Group Home Dialysis Consumables Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 137. WEGO Group Main Business

Table 138. WEGO Group Latest Developments

Table 139. Huaren Pharmaceutical Co., Ltd. Details, Company Type, Home Dialysis Consumables Area Served and Its Competitors

Table 140. Huaren Pharmaceutical Co., Ltd. Home Dialysis Consumables Product Offered

Table 141. Huaren Pharmaceutical Co., Ltd. Home Dialysis Consumables Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 142. Huaren Pharmaceutical Co., Ltd. Main Business

Table 143. Huaren Pharmaceutical Co., Ltd. Latest Developments

Table 144. Sichuan Kelun Pharmaceutical Co., Ltd. Details, Company Type, Home Dialysis Consumables Area Served and Its Competitors

Table 145. Sichuan Kelun Pharmaceutical Co., Ltd. Home Dialysis Consumables Product Offered

Table 146. Sichuan Kelun Pharmaceutical Co., Ltd. Home Dialysis Consumables Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 147. Sichuan Kelun Pharmaceutical Co., Ltd. Main Business

Table 148. Sichuan Kelun Pharmaceutical Co., Ltd. Latest Developments

Table 149. Jiangxi Sanxin Medtec Co., Ltd. Details, Company Type, Home Dialysis Consumables Area Served and Its Competitors

Table 150. Jiangxi Sanxin Medtec Co., Ltd. Home Dialysis Consumables Product Offered

Table 151. Jiangxi Sanxin Medtec Co., Ltd. Home Dialysis Consumables Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 152. Jiangxi Sanxin Medtec Co., Ltd. Main Business

Table 153. Jiangxi Sanxin Medtec Co., Ltd. Latest Developments

Table 154. Bain Medical Equipment Guangzhou Co., Ltd. Details, Company Type, Home Dialysis Consumables Area Served and Its Competitors

Table 155. Bain Medical Equipment Guangzhou Co., Ltd. Home Dialysis Consumables Product Offered

Table 156. Bain Medical Equipment Guangzhou Co., Ltd. Home Dialysis Consumables Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 157. Bain Medical Equipment Guangzhou Co., Ltd. Main Business

Table 158. Bain Medical Equipment Guangzhou Co., Ltd. Latest Developments

Table 159. Renax Biomedical Technology Co., Ltd. Details, Company Type, Home Dialysis Consumables Area Served and Its Competitors

Table 160. Renax Biomedical Technology Co., Ltd. Home Dialysis Consumables Product Offered

Table 161. Renax Biomedical Technology Co., Ltd. Home Dialysis Consumables Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 162. Renax Biomedical Technology Co., Ltd. Main Business

Table 163. Renax Biomedical Technology Co., Ltd. Latest Developments

Table 164. Bioteque Corporation Details, Company Type, Home Dialysis Consumables Area Served and Its Competitors

Table 165. Bioteque Corporation Home Dialysis Consumables Product Offered

Table 166. Bioteque Corporation Home Dialysis Consumables Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 167. Bioteque Corporation Main Business

Table 168. Bioteque Corporation Latest Developments

Table 169. Synopex Inc. Details, Company Type, Home Dialysis Consumables Area Served and Its Competitors

Table 170. Synopex Inc. Home Dialysis Consumables Product Offered

Table 171. Synopex Inc. Home Dialysis Consumables Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 172. Synopex Inc. Main Business

Table 173. Synopex Inc. Latest Developments

Table 174. Hemoclean Co., Ltd. Details, Company Type, Home Dialysis Consumables Area Served and Its Competitors

Table 175. Hemoclean Co., Ltd. Home Dialysis Consumables Product Offered

Table 176. Hemoclean Co., Ltd. Home Dialysis Consumables Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 177. Hemoclean Co., Ltd. Main Business

Table 178. Hemoclean Co., Ltd. Latest Developments

Table 179. Vital Healthcare Sdn. Bhd. Details, Company Type, Home Dialysis Consumables Area Served and Its Competitors

Table 180. Vital Healthcare Sdn. Bhd. Home Dialysis Consumables Product Offered

Table 181. Vital Healthcare Sdn. Bhd. Home Dialysis Consumables Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 182. Vital Healthcare Sdn. Bhd. Main Business

Table 183. Vital Healthcare Sdn. Bhd. Latest Developments

List Of Figures

LIST OF FIGURES

Figure 1. Home Dialysis Consumables Report Years Considered

Figure 2. Research Objectives

Figure 3. Research Methodology

Figure 4. Research Process and Data Source

Figure 5. Global Home Dialysis Consumables Market Size Growth Rate (2021-2032) (\$ millions)

Figure 6. Home Dialysis Consumables Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Figure 7. Home Dialysis Consumables Sales Market Share by Country/Region (2025)

Figure 8. Home Dialysis Consumables Sales Market Share by Country/Region (2021, 2025 & 2032)

Figure 9. Global Home Dialysis Consumables Market Size Market Share by Type in 2025

Figure 10. Global Home Dialysis Consumables Market Size Market Share by Care / Assistance Level in 2025

Figure 11. Global Home Dialysis Consumables Market Size Market Share by Patient Group in 2025

Figure 12. Global Home Dialysis Consumables Market Size Market Share by End User Setting in 2025

Figure 13. Home Dialysis Consumables in Peritoneal Dialysis

Figure 14. Global Home Dialysis Consumables Market: Peritoneal Dialysis (2021-2026) & (\$ millions)

Figure 15. Home Dialysis Consumables in Hemodialysis

Figure 16. Global Home Dialysis Consumables Market: Hemodialysis (2021-2026) & (\$ millions)

Figure 17. Global Home Dialysis Consumables Market Size Market Share by Application in 2025

Figure 18. Global Home Dialysis Consumables Revenue Market Share by Player in 2025

Figure 19. Global Home Dialysis Consumables Market Size Market Share by Region (2021-2026)

Figure 20. Americas Home Dialysis Consumables Market Size 2021-2026 (\$ millions)

Figure 21. APAC Home Dialysis Consumables Market Size 2021-2026 (\$ millions)

Figure 22. Europe Home Dialysis Consumables Market Size 2021-2026 (\$ millions)

Figure 23. Middle East & Africa Home Dialysis Consumables Market Size 2021-2026 (\$

millions)

Figure 24. Americas Home Dialysis Consumables Value Market Share by Country in 2025

Figure 25. United States Home Dialysis Consumables Market Size Growth 2021-2026 (\$ millions)

Figure 26. Canada Home Dialysis Consumables Market Size Growth 2021-2026 (\$ millions)

Figure 27. Mexico Home Dialysis Consumables Market Size Growth 2021-2026 (\$ millions)

Figure 28. Brazil Home Dialysis Consumables Market Size Growth 2021-2026 (\$ millions)

Figure 29. APAC Home Dialysis Consumables Market Size Market Share by Region in 2025

Figure 30. APAC Home Dialysis Consumables Market Size Market Share by Type (2021-2026)

Figure 31. APAC Home Dialysis Consumables Market Size Market Share by Application (2021-2026)

Figure 32. China Home Dialysis Consumables Market Size Growth 2021-2026 (\$ millions)

Figure 33. Japan Home Dialysis Consumables Market Size Growth 2021-2026 (\$ millions)

Figure 34. South Korea Home Dialysis Consumables Market Size Growth 2021-2026 (\$ millions)

Figure 35. Southeast Asia Home Dialysis Consumables Market Size Growth 2021-2026 (\$ millions)

Figure 36. India Home Dialysis Consumables Market Size Growth 2021-2026 (\$ millions)

Figure 37. Australia Home Dialysis Consumables Market Size Growth 2021-2026 (\$ millions)

Figure 38. Europe Home Dialysis Consumables Market Size Market Share by Country in 2025

Figure 39. Europe Home Dialysis Consumables Market Size Market Share by Type (2021-2026)

Figure 40. Europe Home Dialysis Consumables Market Size Market Share by Application (2021-2026)

Figure 41. Germany Home Dialysis Consumables Market Size Growth 2021-2026 (\$ millions)

Figure 42. France Home Dialysis Consumables Market Size Growth 2021-2026 (\$ millions)

- Figure 43. UK Home Dialysis Consumables Market Size Growth 2021-2026 (\$ millions)
- Figure 44. Italy Home Dialysis Consumables Market Size Growth 2021-2026 (\$ millions)
- Figure 45. Russia Home Dialysis Consumables Market Size Growth 2021-2026 (\$ millions)
- Figure 46. Middle East & Africa Home Dialysis Consumables Market Size Market Share by Region (2021-2026)
- Figure 47. Middle East & Africa Home Dialysis Consumables Market Size Market Share by Type (2021-2026)
- Figure 48. Middle East & Africa Home Dialysis Consumables Market Size Market Share by Application (2021-2026)
- Figure 49. Egypt Home Dialysis Consumables Market Size Growth 2021-2026 (\$ millions)
- Figure 50. South Africa Home Dialysis Consumables Market Size Growth 2021-2026 (\$ millions)
- Figure 51. Israel Home Dialysis Consumables Market Size Growth 2021-2026 (\$ millions)
- Figure 52. Turkey Home Dialysis Consumables Market Size Growth 2021-2026 (\$ millions)
- Figure 53. GCC Countries Home Dialysis Consumables Market Size Growth 2021-2026 (\$ millions)
- Figure 54. Americas Home Dialysis Consumables Market Size 2027-2032 (\$ millions)
- Figure 55. APAC Home Dialysis Consumables Market Size 2027-2032 (\$ millions)
- Figure 56. Europe Home Dialysis Consumables Market Size 2027-2032 (\$ millions)
- Figure 57. Middle East & Africa Home Dialysis Consumables Market Size 2027-2032 (\$ millions)
- Figure 58. United States Home Dialysis Consumables Market Size 2027-2032 (\$ millions)
- Figure 59. Canada Home Dialysis Consumables Market Size 2027-2032 (\$ millions)
- Figure 60. Mexico Home Dialysis Consumables Market Size 2027-2032 (\$ millions)
- Figure 61. Brazil Home Dialysis Consumables Market Size 2027-2032 (\$ millions)
- Figure 62. China Home Dialysis Consumables Market Size 2027-2032 (\$ millions)
- Figure 63. Japan Home Dialysis Consumables Market Size 2027-2032 (\$ millions)
- Figure 64. Korea Home Dialysis Consumables Market Size 2027-2032 (\$ millions)
- Figure 65. Southeast Asia Home Dialysis Consumables Market Size 2027-2032 (\$ millions)
- Figure 66. India Home Dialysis Consumables Market Size 2027-2032 (\$ millions)
- Figure 67. Australia Home Dialysis Consumables Market Size 2027-2032 (\$ millions)
- Figure 68. Germany Home Dialysis Consumables Market Size 2027-2032 (\$ millions)
- Figure 69. France Home Dialysis Consumables Market Size 2027-2032 (\$ millions)

Figure 70. UK Home Dialysis Consumables Market Size 2027-2032 (\$ millions)

Figure 71. Italy Home Dialysis Consumables Market Size 2027-2032 (\$ millions)

Figure 72. Russia Home Dialysis Consumables Market Size 2027-2032 (\$ millions)

Figure 73. Egypt Home Dialysis Consumables Market Size 2027-2032 (\$ millions)

Figure 74. South Africa Home Dialysis Consumables Market Size 2027-2032 (\$ millions)

Figure 75. Israel Home Dialysis Consumables Market Size 2027-2032 (\$ millions)

Figure 76. Turkey Home Dialysis Consumables Market Size 2027-2032 (\$ millions)

Figure 77. Global Home Dialysis Consumables Market Size Market Share Forecast by Type (2027-2032)

Figure 78. Global Home Dialysis Consumables Market Size Market Share Forecast by Application (2027-2032)

Figure 79. GCC Countries Home Dialysis Consumables Market Size 2027-2032 (\$ millions)

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