

# Global Peritoneal Dialysate Warmer Market Growth 2026-2032

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## Abstracts

The global Peritoneal Dialysate Warmer market size is predicted to grow from US\$ 11.25 million in 2025 to US\$ 17.00 million in 2032; it is expected to grow at a CAGR of 6.2% from 2026 to 2032.

A peritoneal dialysate warmer is a dedicated ancillary warming device used in peritoneal dialysis to heat sealed peritoneal dialysis solution bags to near body temperature before infusion into the peritoneal cavity. It typically uses dry heat through a warming plate, warming box, insulated heating pouch or sensor-controlled warming chamber, and is generally composed of a heating module, temperature sensor, thermostat, overheat protection structure, insulation layer, power adapter and status display. Portable models may support both household and vehicle power supplies. The product is mainly used for manual exchanges in continuous ambulatory peritoneal dialysis, backup or last-bag warming in automated peritoneal dialysis, hospital PD training and home-care settings. It is not a peritoneal dialysis solution consumable, an automated peritoneal dialysis cycler, a blood warmer or a general infusion warmer. Its core function is to provide safer, stable and controllable dry-heat warming for PD solution bags. Product labels and patient guidance commonly recommend warming PD solution to about 37°C using dry heat and avoiding water immersion or microwave heating because of contamination, hot-spot and solution-integrity risks.

In 2025, global Peritoneal Dialysate Warmer production reached approximately 110,000 to 125,000 units, mainly covering portable home-use PD bag warmers, tabletop constant-temperature warming boxes, soft heating pouches, and identifiable warming modules integrated into automated peritoneal dialysis systems. Driven by the scale-up of low-to-mid-end home-use products in China, stable replacement demand for higher-priced dedicated devices in Europe and North America, and the gradual expansion of

APD-related warming modules, the global ex-factory and FOB average price of Peritoneal Dialysate Warmers stood at approximately USD 85 to USD 105 per unit in 2025. From 2026 to 2032, the market is expected to grow steadily with rising home peritoneal dialysis penetration, stronger patient-comfort requirements, and more standardized care procedures, although its growth rate will remain below that of PD consumables and automated peritoneal dialysis cyclers because it is a low-replacement-frequency ancillary device.

As the global burden of chronic kidney disease and end-stage kidney disease continues to increase, peritoneal dialysis is becoming more closely linked with home-based care, patient self-management and long-term quality-of-life improvement. Although peritoneal dialysate warmers are not the highest-value core equipment within the PD system, they remain a clearly defined supporting device for manual exchanges and home PD care, particularly for CAPD patients, elderly patients, users in colder regions, night-time treatment and travel scenarios where stable warming is needed. In the United States, the share of new ESRD patients starting peritoneal dialysis reached 14.1% in 2023, an all-time high, indicating that home dialysis and PD adoption continue to improve in mature healthcare markets.

The market opportunity for peritoneal dialysate warmers is mainly driven by higher home PD penetration, stronger demand for patient comfort, standardization of nursing procedures and replacement of non-standard warming methods. Compared with improvised warming through hot water, radiators or microwave ovens, dedicated warmers with thermostat control and overheat protection better fit the safety requirements of PD solution handling and can be incorporated into hospital training, home-care kits and PD supply programs. The key challenge is that the product is a low-replacement-frequency specialty accessory, with lower unit value and weaker consumable stickiness than PD solutions, transfer sets and APD cyclers. Since some APD cyclers already include warming functions, standalone warmers are more concentrated in manual exchange, backup warming, portable care and specific patient-use cases. Future demand will shift toward compact size, temperature accuracy, portable power supply, low energy consumption, easy cleaning and home-safety design, while competition will move from basic heating performance toward patient experience, care compliance and stronger fit with home peritoneal dialysis workflows.

LP Information, Inc. (LPI) ' newest research report, the "Peritoneal Dialysate Warmer Industry Forecast" looks at past sales and reviews total world Peritoneal Dialysate Warmer sales in 2025, providing a comprehensive analysis by region and market sector of projected Peritoneal Dialysate Warmer sales for 2026 through 2032. With Peritoneal

Dialysate Warmer sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Peritoneal Dialysate Warmer industry.

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Peritoneal Dialysate Warmer 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 Peritoneal Dialysate Warmer.

This report presents a comprehensive overview, market shares, and growth opportunities of Peritoneal Dialysate Warmer market by product type, application, key manufacturers and key regions and countries.

#### Segmentation by Type:

Portable Hard Case Warmer

Stationary Bench Top Warmer

Soft Heating Pouch

Clinical Warming Cabinet

#### Segmentation by Warming Technology:

Resistive Conductive Heating

Convection Heated Chamber

Flexible Heating Film

Others

#### Segmentation by Temperature Control:

Fixed 37°C Control

Adjustable Thermostat Control

Closed Loop Sensor Control

Basic Thermal Limiter and Others

#### Segmentation by Power and Voltage:

AC Mains Powered

AC and Vehicle DC Powered

Battery Assisted Powered

USB Low Power and Others

#### Segmentation by Application:

Home Care Use

Hospital and Clinic Use

Long Term Care Facility

Travel and Temporary Care

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 analysing the company's coverage, product portfolio, its market penetration.

Vantive

Fresenius Medical Care AG

VEBA MediTemp B.V.

Terumo Corporation

Stickman Dialysis Industries

Medionics International Inc.

Pedigo Products Inc.

Dongguan Great Wall Development Technology Co., Ltd.

Jiangsu JARI Medical Technology Co., Ltd.

JMS Co., Ltd.

Stericox India Private Limited

### Key Questions Addressed in this Report

What is the 10-year outlook for the global Peritoneal Dialysate Warmer market?

What factors are driving Peritoneal Dialysate Warmer market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Peritoneal Dialysate Warmer market opportunities vary by end market size?

How does Peritoneal Dialysate Warmer break out by Type, by Application?

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