

Global Peritoneal Dialysis Access & Accessories Market Growth 2026-2032

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Abstracts

The global Peritoneal Dialysis Access & Accessories market size is predicted to grow from US\$ 394 million in 2025 to US\$ 633 million in 2032; it is expected to grow at a CAGR of 7.1% from 2026 to 2032.

Peritoneal Dialysis Access & Accessories refers to the ecosystem of sterile consumables and compatible components that support the full PD access pathway—from access creation and connection exchange to routine home care and complication management. It encompasses the implantable peritoneal dialysis catheter as well as transfer sets, connectors and extension lines, titanium/plastic adaptors and caps, clamps, flush/locking-related components, and exit-site securement and care supplies. The core problem this category solves is enabling safe, standardized dialysate infusion and drainage with minimal contamination exposure during frequent disconnect/reconnect cycles, while reducing the risk of peritonitis and other infections, maintaining patency, minimizing leakage or blockage, and improving usability and adherence in long-term home-based therapy. Its evolution closely tracks the shift of PD from hospital-centered care to home-centered care: early PD relied on simpler connection methods with more manual handling and less consistent infection control, but as CAPD/APD expanded and “reduced touch/reduced exposure” principles became embedded in clinical practice—supported by clearer guidelines and nursing protocols—accessories progressed from fragmented items to more systematized, traceable, and training-friendly solutions. In many markets, this has also created “platform-like” access ecosystems where catheter, transfer sets, connection systems, and care supplies are designed and validated to work together within a standardized clinical pathway. Upstream materials and components typically include medical-grade polymers (e.g., silicone, polyurethane, polypropylene, polycarbonate) for catheters, tubing, connectors, caps, and clamps; precision-molded parts and sealing structures (O-

rings, valve/check mechanisms) designed for low leakage and repeated operation; sterile barrier and packaging materials (medical papers, Tyvek, blister trays, pouches, indicators, labels); textile/nonwoven and medical adhesive materials for securement and exit-site care; and, where applicable, radiopaque markers and coating/surface-treatment systems. The upstream supply chain is commonly formed by medical resin and compound suppliers, precision injection-molding and tooling specialists, silicone extrusion/assembly manufacturers, sealing component vendors, sterile packaging suppliers, and sterilization service providers. In 2025, the global production capacity of peritoneal dialysis access and accessories reached 7.0 million units, with sales volume totaling 4.726 million units. The average selling price was approximately USD 85.3 per unit, and manufacturers' gross margins were generally in the range of 20% to 30%.

The current PD access and accessories market is defined by system-level purchasing centered on infection risk control and product bundling optimized for home usability. Hospitals and dialysis programs increasingly evaluate accessories as part of an end-to-end access quality pathway rather than interchangeable "generic" consumables, because connector integrity, repeated-use sealing performance, reduced-touch/reduced-exposure designs, workflow fit, and the availability of training and follow-up support all influence real-world peritonitis risk and patient adherence. Competition therefore tends to favor established players that offer a platform-like ecosystem—validated compatibility across catheter, transfer sets, connectors, and care supplies, reinforced by standardized training—creating strong clinical stickiness. Regional suppliers often enter through local registration agility, delivery reliability, and cost positioning, but must overcome hurdles in clinical compatibility evidence, manufacturing consistency, and hospital-level standardization. At the same time, tendering and cost containment continue to intensify, keeping the market in a constant push–pull between price pressure and outcome-driven value (lower infection and fewer complications), which elevates the importance of credible evidence and measurable workflow improvements.

Looking ahead, the category will evolve toward lower contamination exposure, higher procedural standardization, and broader digital traceability, extending deeper into home care and full-cycle chronic management. On the product side, connection and transfer systems will continue shifting toward more closed, simplified, low-error designs that maintain stable sealing performance through frequent disconnect/reconnect cycles and reduce microbial ingress risk. Accessory offerings will become more modular and scenario-specific, with clearer standard packs plus optional modules aligned to CAPD versus APD routines, patient capability differences, and variability in nursing resources—reducing unnecessary items while lowering use complexity. From a supply-

chain and compliance standpoint, UDI/barcode capture and integration with hospital inventory systems will become more common, turning accessories from “consumables” into operational data entry points. Service models may expand around structured training, follow-up, infection-event review, and continuous improvement. As remote nursing and chronic-care platforms mature, accessory design will place even greater emphasis on user experience and pathway consistency to support reliable aseptic practice at home and reduce outcome variability driven by adherence.

Key drivers include healthcare systems’ dual focus on efficiency and quality in chronic disease management: expanding home dialysis, easing pressure on in-center HD capacity, and reducing complications through standardized routines are shared objectives across many regions. Clinical guidelines and quality metrics that emphasize peritonitis, access dysfunction, and readmissions also push providers to treat connection systems and care accessories as high-leverage intervention points. In addition, nursing shortages and leaner hospital operations increase the appeal of accessory bundles that are easier to train, simpler to use, and less prone to rework. Major constraints cluster around evidence thresholds, switching risk, and compliance costs: requirements for materials, sterilization, packaging validation, and change control vary by jurisdiction, and even “simple” accessory changes can trigger revalidation and regulatory burden. Clinicians often have strong pathway dependence on existing platforms, and because adverse events carry high clinical and reputational costs, platform switching typically demands substantial training and real-world data. Combined with tender-cycle uncertainty, aggressive cost pressure, and supply risks tied to critical materials and sterilization/packaging capacity, these factors can slow adoption of new entrants and delay the scaling of premium accessory solutions.

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

This Insight Report provides a comprehensive analysis of the global Peritoneal Dialysis Access & Accessories 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 Dialysis Access & Accessories portfolios and capabilities, market

entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Peritoneal Dialysis Access & Accessories market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Peritoneal Dialysis Access & Accessories 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 Dialysis Access & Accessories.

This report presents a comprehensive overview, market shares, and growth opportunities of Peritoneal Dialysis Access & Accessories market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Straight Catheter

Pigtail-curved Catheter

Others

Segmentation by Material:

Silicone

Polyurethane

Surface Modification Materials

Segmentation by Implantation Procedure:

Percutaneous Catheter Placement

Laparoscopic Catheter Placement

Others

Segmentation by Application:

Acute Peritoneal Dialysis (APD)

Chronic peritoneal dialysis (CPD)

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.

Medtronic

Fresenius

Baxter

US rental care

B.Braun

Diaverum

Nipro Corporation

Asahi Kasei

Nikkiso

Toray

WEGO group

Merit Medical

PFM Medical

AMECATH

AdvinHealthcare

Key Questions Addressed in this Report

What is the 10-year outlook for the global Peritoneal Dialysis Access & Accessories market?

What factors are driving Peritoneal Dialysis Access & Accessories market growth, globally and by region?

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

How do Peritoneal Dialysis Access & Accessories market opportunities vary by end market size?

How does Peritoneal Dialysis Access & Accessories break out by Type, by Application?

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