

Peritoneal Dialysis Market by Offering (Peritoneal Dialysis Solution Bags, Machines), Modality (Continuous Ambulatory Peritoneal Dialysis Center(CAPD)), Disease Indication (End-Stage Renal Disease), End User (Hospitals) - Global Forecast to 2029

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Abstracts

The peritoneal dialysis market is projected to reach USD 12.70 Billion by 2029 from USD 9.58 Billion in 2024 at a CAGR of 5.8% during the forecast period. Favorable healthcare policies in developed markets have highly increased access to peritoneal dialysis since many now offer reimbursements for home-based dialysis treatments. In most cases, the United States, Canada, and several others in Europe have come up with policies that acknowledge the cost-effectiveness and better benefits for patients through peritoneal dialysis over in-center hemodialysis. Such policies reduce the barriers associated with the cost of treatment by establishing reimbursement coverage for a significant portion of the PD-associated treatment costs. This could make PD a much more affordable and accessible form of therapy for patients, and reimbursement programs promote the practice of healthcare providers to recommend PD due to its flexibility and practicality, also for those preferring home management of treatment. For instance, in the United States, Medicare's ESRD program encourages wider adoption by providing reimbursements for home dialysis. Likewise, other developed markets also are following and encouraging home dialysis since it reduces hospital admissions, improves patient outcomes, and reduces burdens on the healthcare facilities. The financial support that comes with PD has become a reason for the aged and bedridden patients who have been able to live better as a result of reduced immobilization and enhanced personal care.

“The peritoneal solution bags segment is accounted for the largest share of peritoneal dialysis market.”

Peritoneal dialysis solution bags are less expensive than machines because they are not reliant upon pricey technology and maintenance. Because of this, these bags are very inexpensive for patients and healthcare systems, whose production and distribution costs make it possible to sell these bags at prices within everyone's reach, especially in countries that have tightly constrained health care budgets. Solution bags also reduce the requirement for costly equipment and training of the staff, thereby reducing the overall cost of treatment. This adds to the attractiveness of solution bags as a treatment option for a larger number of patients in resource-poor settings for access to necessary dialysis.

“Continuous Ambulatory Peritoneal Dialysis (CAPD) segment holds the largest market share of peritoneal dialysis market.”

The increased coverage of CAPD supplies, especially the solution bags, has stimulated its adoption, especially in developing countries. CAPD, being any form of dialysis treatment, requires only basic supplies, like solution bags, and hence is much simpler to distribute and implement in areas with very poor healthcare resources than expensive machinery. Therefore, it is more cost-effective and accessible to patients in low-resource settings as a practically offered form of dialysis. Ease of use and minimization of the use of hospital facilities further increase the adoption rate of CAPD, thereby increasing access to dialysis care in underprivileged areas globally.

“End-stage renal disease segment holds the largest market share in the global peritoneal dialysis market and expected to grow at the highest CAGR during the forecast period”

Most healthcare systems promote home dialysis options to decrease the prevalence of hospital visits attributed to end-stage renal disease (ESRD), which subsequently saves the overall cost of healthcare. Health care providers would benefit from home peritoneal dialysis by reducing the need for in-center dialysis, thus saving hospital facility capacities and minimizing the problems it poses both to facilities and personnel. Home dialysis will also improve patients' lives as they assume control over their treatment. An added advantage of home-based PD is that it is very economical since it saves transportation costs, it minimizes the susceptibility to infection, and encourages continuity of care, which makes it an attractive modality for health care systems.

“Home care settings segment accounted for the largest market share in the global peritoneal dialysis market and expected to grow at the highest CAGR during the forecast period.”

Portable and user-friendly dialysis equipment have further improved the safety and ease of treatment in the home setting for patients. Modern peritoneal dialysis machines are well designed with intuitive interfaces, automation, and compact size, making them devices that patients can use with relative ease, without relying so much on medical knowledge. Thus, independent and comfortable home-based dialysis has reduced a patient's dependence on healthcare professionals. Safety measures have upgraded with live monitoring and automatic alarms that enhanced outcomes best dealt with early before dangers occur. In those innovations, patient confidence in handling their care improved, while the treatment compliance was generally enhanced.

“North America to witness the substantial growth rate during the forecast period.”

The peritoneal dialysis market is segmented into North America, Europe, Asia Pacific, Latin America, the Middle East & Africa and GCC Countries based on the region type. In 2023, the Asia Pacific region is projected to exhibit the highest CAGR during the forecast period. However, North America accounts for the largest market share of the peritoneal dialysis market in 2023. North America is the largest regional market for global peritoneal dialysis, and this is partly because healthcare providers in this region have been trained specifically to manage this treatment. This places them in a better position to ensure that patients requiring the treatment receive a holistic education on how to carry out procedures safely and effectively at home. Moreover, these professionals provide timely interventions through effective monitoring, thus making the outcomes better as well as complications as low as possible. Specialized training programs and ongoing professional development in the region further underpin quality care. Such professionalism among healthcare professionals has indeed contributed to success in the introduction and spread of peritoneal dialysis in North America.

A breakdown of the primary participants (supply-side) for the peritoneal dialysis market referred to for this report is provided below:

By Company Type: Tier 1–45%, Tier 2–30%, and Tier 3–25%

By Designation: C-level–35%, Director Level–25%, and Others–40%

By Region: North America–40%, Europe–20%, Asia Pacific–25%, Latin America–

10%, and Middle East and Africa– 3% and GCC Countries– 2%

Prominent players in this market include Baxter International Inc. (US), Fresenius Medical Care AG (Germany), Medtronic plc (Ireland), Davita Inc. (US), Becton, Dickinson and Company (US), Utah Medical Products, Inc. (US), Terumo Corporation (Japan), Diaverum AB (Sweden), Medionics (Canada), Newsol Technologies (Canada), Apollo Dialysis Pvt Ltd (India), U.S. Renal Care, Inc. (US), Northwest Kidney Centers (US), Relavo (US), Mitra Industries Pvt Ltd (India), JMS Co., Ltd. (Japan), AMECATH (Egypt), Polymedicure (India), Huaren Pharmaceutical (China), AWAK Technologies (Singapore), Innovative Renal Care (US), Romsons (India), SSEM Mthembu Medical (Pty) Ltd (South Africa), Renax Biomedical Technology Co., Ltd (China), and Advin Health Care (India).

Research Coverage:

The market study covers the peritoneal dialysis market across various segments. It aims at estimating the market size and the growth potential of this market across different segments by offering, modality, disease indication, end user and region. The study also includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to their product and business offerings, recent developments, and key market strategies.

Reasons to Buy the Report

This report will enrich established firms as well as new entrants/smaller firms to gauge the pulse of the market, which, in turn, would help them garner a greater share of the market. Firms purchasing the report could use one or a combination of the below-mentioned strategies to strengthen their positions in the market.

This report provides insights on:

? Analysis of Market Dynamics: Drivers (rising prevalence of chronic kidney diseases, growing prevalence of diabetes and hypertension, and technological advancements and increased investment in R&D) restraints (underutilization of peritoneal dialysis in low-income and lower-middle-income countries (LLMICs)) opportunities (increasing growth opportunities in emerging economies, and surge in demand for home dialysis treatment), and challenges (growing incidence of treated kidney failure, and shortage of skilled nephrologists in low-income and lower-middle-income countries (LLMICs))

? **Services/Innovations:** Detailed insights on upcoming technologies, research & development activities, and new product launches in the peritoneal dialysis market.

? **Market Development:** Comprehensive information on the lucrative emerging markets, components, demographics, end-user, and region.

? **Market Diversification:** Exhaustive information about the product portfolios, growing geographies, recent developments, and investments in the peritoneal dialysis market.

? **Competitive Assessment:** In-depth assessment of market shares, growth strategies, product offerings, and capabilities of the leading players in the peritoneal dialysis market like Baxter International Inc. (US), Fresenius Medical Care AG (Germany), Medtronic plc (Ireland), Davita Inc. (US), Becton, Dickinson and Company (US).

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