

Transportable Kidney Perfusion System Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Product Type

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Abstracts

Transportable Kidney Perfusion System Market Summary

Introduction

The transportable kidney perfusion system market represents a specialized segment within the organ preservation and transplantation industry, focusing on advanced medical devices designed specifically to maintain kidney viability during transport from donor hospitals to transplant centers. These sophisticated systems enable continuous perfusion of donor kidneys with oxygenated preservation solutions, significantly extending preservation times and improving transplant outcomes compared to traditional static cold storage methods. Transportable kidney perfusion systems operate through two primary technologies: cold perfusion systems that maintain kidneys at hypothermic temperatures while providing continuous circulation, and warm perfusion systems that maintain near-physiological temperatures and metabolic activity. The technology addresses the critical challenge of kidney preservation, where traditional cold storage limits viable preservation time to approximately 24-30 hours, while machine perfusion can extend this period and enable real-time assessment of kidney function. Approximately 850 million people worldwide are estimated to suffer from some form of kidney disease, creating substantial demand for effective transplantation solutions. The LifePort kidney perfusion transport system is the most widely used kidney hypothermic machine perfusion product globally, demonstrating the technology's established clinical acceptance. The systems incorporate sophisticated monitoring capabilities including pressure sensors, flow meters, and temperature controls that enable transplant teams to assess kidney viability during transport and make informed decisions about transplant suitability.

Market Size and Growth Forecast

The global transportable kidney perfusion system market is projected to reach USD 65-80 million by 2025, with an estimated compound annual growth rate (CAGR) of 7%-9% through 2030. This growth reflects the increasing adoption of machine perfusion technologies in transplant centers worldwide and expanding evidence of improved transplant outcomes.

Regional Analysis

North America dominates the transportable kidney perfusion system market with a growth rate of 8%-11%, led by the United States where advanced transplant infrastructure and high transplant volumes drive demand. According to the United Network for Organ Sharing (UNOS), more than 100,000 Americans are waiting for organ transplants, with 17 people dying daily while waiting. As of November 2024, data from the US Organ Procurement and Transplantation Network shows approximately 90,000 people are waiting for kidney transplants, representing the largest segment of the transplant waiting list. The region benefits from well-established reimbursement mechanisms and strong clinical evidence supporting machine perfusion adoption.

Europe follows with a growth rate of 6%-9%, led by countries including Germany, the United Kingdom, Spain, and France, which have sophisticated organ donation and transplantation programs. European transplant centers increasingly adopt machine perfusion to optimize organ utilization and improve patient outcomes, supported by favorable regulatory frameworks and healthcare policies.

Asia Pacific shows emerging growth potential of 7%-10%, primarily driven by China, Japan, and India. China's expanding transplant programs and increasing organ donation rates create significant opportunities, while Japan's advanced medical technology adoption and aging population support market growth. India's improving healthcare infrastructure contributes to regional expansion.

South America demonstrates moderate growth of 5%-7%, with Brazil and Mexico leading adoption as transplant programs expand and international collaboration in organ sharing increases.

The Middle East and Africa represent emerging markets with growth rates of 4%-6%, driven by developing transplant capabilities in countries like South Africa, UAE, and

Israel.

Type Analysis

Cold Perfusion systems currently represent the majority of the transportable kidney perfusion market, projected to grow at 6%-8%. These systems maintain kidneys at hypothermic temperatures (typically 4-8°C) while providing continuous perfusion with oxygenated preservation solutions. Cold perfusion technology has established clinical evidence and widespread acceptance among transplant centers, supported by extensive research demonstrating improved graft function and reduced delayed graft function rates compared to static cold storage.

Warm Perfusion systems show rapid growth potential of 10%-14%, representing emerging technology that maintains kidneys at near-physiological temperatures (typically 35-37°C). This approach enables active metabolism and real-time assessment of kidney function during preservation, allowing for potential rehabilitation of marginal kidneys and better evaluation of transplant suitability. Warm perfusion technology offers the potential for longer preservation periods and improved outcomes for extended criteria donor kidneys.

Key Market Players

Waters Medical System operates as a specialized medical device company focusing on organ preservation technologies, with particular expertise in transportable kidney perfusion systems. The company develops user-friendly systems designed for operation by transplant coordinators and surgical teams, emphasizing reliability and ease of use in clinical environments.

Organ Assist stands as a Netherlands-based leader in machine perfusion technology, recognized for its innovative kidney preservation systems that combine cold and warm perfusion capabilities. The company's extensive clinical experience and technical expertise position it as a key player in the European and global markets, with particular strength in developing next-generation perfusion technologies.

Shanghai Genext Medical Technology serves as a Chinese medical device company specializing in organ preservation systems for the Asia Pacific region. The company focuses on developing cost-effective transportable kidney perfusion solutions tailored to regional healthcare infrastructure while maintaining international quality standards and regulatory compliance.

Porter Five Forces Analysis

Threat of New Entrants: Low to Moderate. The transportable kidney perfusion system market presents significant barriers to entry, including high regulatory requirements for medical devices, substantial capital investment for research and development, and the need for extensive clinical evidence to demonstrate safety and efficacy. However, the growing market opportunity and potential for technological innovation may attract new players, particularly those with expertise in medical devices or organ transplantation.

Threat of Substitutes: Low to Moderate. Traditional static cold storage remains the standard preservation method in many transplant centers, representing a lower-cost alternative to machine perfusion. However, the superior outcomes demonstrated by machine perfusion systems, including reduced delayed graft function and improved long-term graft survival, limit the attractiveness of substitute preservation methods.

Bargaining Power of Buyers: High. Transplant centers and hospitals represent sophisticated buyers with significant technical expertise in evaluating system performance and clinical outcomes. The high cost of equipment and ongoing consumables, combined with budget constraints in healthcare systems, gives buyers substantial negotiating power over pricing and contract terms.

Bargaining Power of Suppliers: Moderate. Suppliers of specialized components including perfusion pumps, sensors, preservation solutions, and other critical system elements have moderate power due to the technical complexity and regulatory requirements for medical device components. However, established manufacturers often maintain long-term supplier relationships and may pursue vertical integration strategies.

Competitive Rivalry: High. The market is characterized by intense competition among a limited number of specialized players, each seeking to differentiate their products through clinical evidence, system reliability, ease of use, and comprehensive service support. Competition focuses on demonstrating superior transplant outcomes and developing innovative features that improve kidney preservation effectiveness.

Market Opportunities and Challenges

Opportunities

Expanding Transplant Programs: Global expansion of kidney transplant programs, driven by increasing end-stage renal disease prevalence and improved surgical techniques, creates substantial opportunities for transportable perfusion system adoption. The growing acceptance of machine perfusion as standard of care in major transplant centers supports market expansion.

Extended Criteria Donor Utilization: The growing acceptance of kidneys from extended criteria donors, including older donors and those with comorbidities, creates opportunities for perfusion systems that can assess and potentially improve the viability of these marginal organs, thereby expanding the available donor pool.

Geographic Expansion of Organ Sharing: Increasing collaboration between transplant centers across greater geographic distances creates demand for reliable preservation systems that can maintain kidney viability during extended transport times.

Technological Integration: Opportunities exist to integrate artificial intelligence, biomarker monitoring, and predictive analytics into perfusion systems, enabling more sophisticated assessment of kidney viability and prediction of transplant outcomes.

Regulatory Support: Growing regulatory recognition of machine perfusion benefits, including favorable reimbursement policies and clinical guidelines, creates opportunities for broader adoption and market expansion.

Challenges

High System Costs: The significant capital investment required for perfusion systems and ongoing costs for consumables and maintenance create barriers to adoption, particularly in resource-constrained healthcare systems and developing markets.

Limited Clinical Experience: The relatively limited long-term clinical data on

machine perfusion outcomes compared to traditional preservation methods creates uncertainty for some transplant centers and may slow adoption rates.

Training and Implementation Requirements: The need for specialized training and protocol development to operate perfusion systems effectively creates implementation challenges and may limit adoption in centers with limited transplant experience.

Organ Shortage Constraints: The fundamental shortage of donor kidneys limits market growth potential, as the number of available organs ultimately constrains the addressable market for preservation systems.

Regulatory Complexity: Navigating different regulatory requirements across global markets requires substantial resources and expertise, potentially delaying product launches and increasing development costs for system manufacturers.

Contents

CHAPTER 1 EXECUTIVE SUMMARY

CHAPTER 2 ABBREVIATION AND ACRONYMS

CHAPTER 3 PREFACE

- 3.1 Research Scope
- 3.2 Research Sources
 - 3.2.1 Data Sources
 - 3.2.2 Assumptions
- 3.3 Research Method

CHAPTER 4 MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 Classification/Types
- 4.3 Application/End Users

CHAPTER 5 MARKET TREND ANALYSIS

- 5.1 Introduction
- 5.2 Drivers
- 5.3 Restraints
- 5.4 Opportunities
- 5.5 Threats

CHAPTER 6 INDUSTRY CHAIN ANALYSIS

- 6.1 Upstream/Suppliers Analysis
- 6.2 Transportable Kidney Perfusion System Analysis
 - 6.2.1 Technology Analysis
 - 6.2.2 Cost Analysis
 - 6.2.3 Market Channel Analysis
- 6.3 Downstream Buyers/End Users

CHAPTER 7 LATEST MARKET DYNAMICS

- 7.1 Latest News
- 7.2 Merger and Acquisition
- 7.3 Planned/Future Project
- 7.4 Policy Dynamics

CHAPTER 8 TRADING ANALYSIS

- 8.1 Export of Transportable Kidney Perfusion System by Region
- 8.2 Import of Transportable Kidney Perfusion System by Region
- 8.3 Balance of Trade

CHAPTER 9 HISTORICAL AND FORECAST TRANSPORTABLE KIDNEY PERFUSION SYSTEM MARKET IN NORTH AMERICA (2020-2030)

- 9.1 Transportable Kidney Perfusion System Market Size
- 9.2 Transportable Kidney Perfusion System Demand by End Use
- 9.3 Competition by Players/Suppliers
- 9.4 Type Segmentation and Price
- 9.5 Key Countries Analysis
 - 9.5.1 United States
 - 9.5.2 Canada
 - 9.5.3 Mexico

CHAPTER 10 HISTORICAL AND FORECAST TRANSPORTABLE KIDNEY PERFUSION SYSTEM MARKET IN SOUTH AMERICA (2020-2030)

- 10.1 Transportable Kidney Perfusion System Market Size
- 10.2 Transportable Kidney Perfusion System Demand by End Use
- 10.3 Competition by Players/Suppliers
- 10.4 Type Segmentation and Price
- 10.5 Key Countries Analysis
 - 10.5.1 Brazil
 - 10.5.2 Argentina
 - 10.5.3 Chile
 - 10.5.4 Peru

CHAPTER 11 HISTORICAL AND FORECAST TRANSPORTABLE KIDNEY PERFUSION SYSTEM MARKET IN ASIA & PACIFIC (2020-2030)

- 11.1 Transportable Kidney Perfusion System Market Size
- 11.2 Transportable Kidney Perfusion System Demand by End Use
- 11.3 Competition by Players/Suppliers
- 11.4 Type Segmentation and Price
- 11.5 Key Countries Analysis
 - 11.5.1 China
 - 11.5.2 India
 - 11.5.3 Japan
 - 11.5.4 South Korea
 - 11.5.5 Southeast Asia
 - 11.5.6 Australia

CHAPTER 12 HISTORICAL AND FORECAST TRANSPORTABLE KIDNEY PERFUSION SYSTEM MARKET IN EUROPE (2020-2030)

- 12.1 Transportable Kidney Perfusion System Market Size
- 12.2 Transportable Kidney Perfusion System Demand by End Use
- 12.3 Competition by Players/Suppliers
- 12.4 Type Segmentation and Price
- 12.5 Key Countries Analysis
 - 12.5.1 Germany
 - 12.5.2 France
 - 12.5.3 United Kingdom
 - 12.5.4 Italy
 - 12.5.5 Spain
 - 12.5.6 Belgium
 - 12.5.7 Netherlands
 - 12.5.8 Austria
 - 12.5.9 Poland
 - 12.5.10 Russia

CHAPTER 13 HISTORICAL AND FORECAST TRANSPORTABLE KIDNEY PERFUSION SYSTEM MARKET IN MEA (2020-2030)

- 13.1 Transportable Kidney Perfusion System Market Size
- 13.2 Transportable Kidney Perfusion System Demand by End Use
- 13.3 Competition by Players/Suppliers
- 13.4 Type Segmentation and Price
- 13.5 Key Countries Analysis

- 13.5.1 Egypt
- 13.5.2 Israel
- 13.5.3 South Africa
- 13.5.4 Gulf Cooperation Council Countries
- 13.5.5 Turkey

CHAPTER 14 SUMMARY FOR GLOBAL TRANSPORTABLE KIDNEY PERFUSION SYSTEM MARKET (2020-2025)

- 14.1 Transportable Kidney Perfusion System Market Size
- 14.2 Transportable Kidney Perfusion System Demand by End Use
- 14.3 Competition by Players/Suppliers
- 14.4 Type Segmentation and Price

CHAPTER 15 GLOBAL TRANSPORTABLE KIDNEY PERFUSION SYSTEM MARKET FORECAST (2025-2030)

- 15.1 Transportable Kidney Perfusion System Market Size Forecast
- 15.2 Transportable Kidney Perfusion System Demand Forecast
- 15.3 Competition by Players/Suppliers
- 15.4 Type Segmentation and Price Forecast

CHAPTER 16 ANALYSIS OF GLOBAL KEY VENDORS

- 16.1 Waters Medical System
 - 16.1.1 Company Profile
 - 16.1.2 Main Business and Transportable Kidney Perfusion System Information
 - 16.1.3 SWOT Analysis of Waters Medical System
 - 16.1.4 Waters Medical System Transportable Kidney Perfusion System Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.2 Organ Assist
 - 16.2.1 Company Profile
 - 16.2.2 Main Business and Transportable Kidney Perfusion System Information
 - 16.2.3 SWOT Analysis of Organ Assist
 - 16.2.4 Organ Assist Transportable Kidney Perfusion System Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.3 Shanghai Genext Medical Technology
 - 16.3.1 Company Profile
 - 16.3.2 Main Business and Transportable Kidney Perfusion System Information

16.3.3 SWOT Analysis of Shanghai Genext Medical Technology

16.3.4 Shanghai Genext Medical Technology Transportable Kidney Perfusion System
Sales, Revenue, Price and Gross Margin (2020-2025)

Please ask for sample pages for full companies list

Tables & Figures

TABLES AND FIGURES

Table Abbreviation and Acronyms List

Table Research Scope of Transportable Kidney Perfusion System Report

Table Data Sources of Transportable Kidney Perfusion System Report

Table Major Assumptions of Transportable Kidney Perfusion System Report

Figure Market Size Estimated Method

Figure Major Forecasting Factors

Figure Transportable Kidney Perfusion System Picture

Table Transportable Kidney Perfusion System Classification

Table Transportable Kidney Perfusion System Applications List

Table Drivers of Transportable Kidney Perfusion System Market

Table Restraints of Transportable Kidney Perfusion System Market

Table Opportunities of Transportable Kidney Perfusion System Market

Table Threats of Transportable Kidney Perfusion System Market

Table Covid-19 Impact For Transportable Kidney Perfusion System Market

Table Raw Materials Suppliers List

Table Different Production Methods of Transportable Kidney Perfusion System

Table Cost Structure Analysis of Transportable Kidney Perfusion System

Table Key End Users List

Table Latest News of Transportable Kidney Perfusion System Market

Table Merger and Acquisition List

Table Planned/Future Project of Transportable Kidney Perfusion System Market

Table Policy of Transportable Kidney Perfusion System Market

Table 2020-2030 Regional Export of Transportable Kidney Perfusion System

Table 2020-2030 Regional Import of Transportable Kidney Perfusion System

Table 2020-2030 Regional Trade Balance

Figure 2020-2030 Regional Trade Balance

Table 2020-2030 North America Transportable Kidney Perfusion System Market Size and Market Volume List

Figure 2020-2030 North America Transportable Kidney Perfusion System Market Size and CAGR

Figure 2020-2030 North America Transportable Kidney Perfusion System Market Volume and CAGR

Table 2020-2030 North America Transportable Kidney Perfusion System Demand List by Application

Table 2020-2025 North America Transportable Kidney Perfusion System Key Players

Sales List

Table 2020-2025 North America Transportable Kidney Perfusion System Key Players

Market Share List

Table 2020-2030 North America Transportable Kidney Perfusion System Demand List
by Type

Table 2020-2025 North America Transportable Kidney Perfusion System Price List by
Type

Table 2020-2030 United States Transportable Kidney Perfusion System Market Size
and Market Volume List

Table 2020-2030 United States Transportable Kidney Perfusion System Import & Export
List

Table 2020-2030 Canada Transportable Kidney Perfusion System Market Size and
Market Volume List

Table 2020-2030 Canada Transportable Kidney Perfusion System Import & Export List

Table 2020-2030 Mexico Transportable Kidney Perfusion System Market Size and
Market Volume List

Table 2020-2030 Mexico Transportable Kidney Perfusion System Import & Export List

Table 2020-2030 South America Transportable Kidney Perfusion System Market Size
and Market Volume List

Figure 2020-2030 South America Transportable Kidney Perfusion System Market Size
and CAGR

Figure 2020-2030 South America Transportable Kidney Perfusion System Market
Volume and CAGR

Table 2020-2030 South America Transportable Kidney Perfusion System Demand List
by Application

Table 2020-2025 South America Transportable Kidney Perfusion System Key Players
Sales List

Table 2020-2025 South America Transportable Kidney Perfusion System Key Players
Market Share List

Table 2020-2030 South America Transportable Kidney Perfusion System Demand List
by Type

Table 2020-2025 South America Transportable Kidney Perfusion System Price List by
Type

Table 2020-2030 Brazil Transportable Kidney Perfusion System Market Size and
Market Volume List

Table 2020-2030 Brazil Transportable Kidney Perfusion System Import & Export List

Table 2020-2030 Argentina Transportable Kidney Perfusion System Market Size and
Market Volume List

Table 2020-2030 Argentina Transportable Kidney Perfusion System Import & Export

List

Table 2020-2030 Chile Transportable Kidney Perfusion System Market Size and Market Volume List

Table 2020-2030 Chile Transportable Kidney Perfusion System Import & Export List

Table 2020-2030 Peru Transportable Kidney Perfusion System Market Size and Market Volume List

Table 2020-2030 Peru Transportable Kidney Perfusion System Import & Export List

Table 2020-2030 Asia & Pacific Transportable Kidney Perfusion System Market Size and Market Volume List

Figure 2020-2030 Asia & Pacific Transportable Kidney Perfusion System Market Size and CAGR

Figure 2020-2030 Asia & Pacific Transportable Kidney Perfusion System Market Volume and CAGR

Table 2020-2030 Asia & Pacific Transportable Kidney Perfusion System Demand List by Application

Table 2020-2025 Asia & Pacific Transportable Kidney Perfusion System Key Players Sales List

Table 2020-2025 Asia & Pacific Transportable Kidney Perfusion System Key Players Market Share List

Table 2020-2030 Asia & Pacific Transportable Kidney Perfusion System Demand List by Type

Table 2020-2025 Asia & Pacific Transportable Kidney Perfusion System Price List by Type

Table 2020-2030 China Transportable Kidney Perfusion System Market Size and Market Volume List

Table 2020-2030 China Transportable Kidney Perfusion System Import & Export List

Table 2020-2030 India Transportable Kidney Perfusion System Market Size and Market Volume List

Table 2020-2030 India Transportable Kidney Perfusion System Import & Export List

Table 2020-2030 Japan Transportable Kidney Perfusion System Market Size and Market Volume List

Table 2020-2030 Japan Transportable Kidney Perfusion System Import & Export List

Table 2020-2030 South Korea Transportable Kidney Perfusion System Market Size and Market Volume List

Table 2020-2030 South Korea Transportable Kidney Perfusion System Import & Export List

Table 2020-2030 Southeast Asia Transportable Kidney Perfusion System Market Size List

Table 2020-2030 Southeast Asia Transportable Kidney Perfusion System Market

Volume List

Table 2020-2030 Southeast Asia Transportable Kidney Perfusion System Import List

Table 2020-2030 Southeast Asia Transportable Kidney Perfusion System Export List

Table 2020-2030 Australia Transportable Kidney Perfusion System Market Size and Market Volume List

Table 2020-2030 Australia Transportable Kidney Perfusion System Import & Export List

Table 2020-2030 Europe Transportable Kidney Perfusion System Market Size and Market Volume List

Figure 2020-2030 Europe Transportable Kidney Perfusion System Market Size and CAGR

Figure 2020-2030 Europe Transportable Kidney Perfusion System Market Volume and CAGR

Table 2020-2030 Europe Transportable Kidney Perfusion System Demand List by Application

Table 2020-2025 Europe Transportable Kidney Perfusion System Key Players Sales List

Table 2020-2025 Europe Transportable Kidney Perfusion System Key Players Market Share List

Table 2020-2030 Europe Transportable Kidney Perfusion System Demand List by Type

Table 2020-2025 Europe Transportable Kidney Perfusion System Price List by Type

Table 2020-2030 Germany Transportable Kidney Perfusion System Market Size and Market Volume List

Table 2020-2030 Germany Transportable Kidney Perfusion System Import & Export List

Table 2020-2030 France Transportable Kidney Perfusion System Market Size and Market Volume List

Table 2020-2030 France Transportable Kidney Perfusion System Import & Export List

Table 2020-2030 United Kingdom Transportable Kidney Perfusion System Market Size and Market Volume List

Table 2020-2030 United Kingdom Transportable Kidney Perfusion System Import & Export List

Table 2020-2030 Italy Transportable Kidney Perfusion System Market Size and Market Volume List

Table 2020-2030 Italy Transportable Kidney Perfusion System Import & Export List

Table 2020-2030 Spain Transportable Kidney Perfusion System Market Size and Market Volume List

Table 2020-2030 Spain Transportable Kidney Perfusion System Import & Export List

Table 2020-2030 Belgium Transportable Kidney Perfusion System Market Size and Market Volume List

Table 2020-2030 Belgium Transportable Kidney Perfusion System Import & Export List

Table 2020-2030 Netherlands Transportable Kidney Perfusion System Market Size and Market Volume List

Table 2020-2030 Netherlands Transportable Kidney Perfusion System Import & Export List

Table 2020-2030 Austria Transportable Kidney Perfusion System Market Size and Market Volume List

Table 2020-2030 Austria Transportable Kidney Perfusion System Import & Export List

Table 2020-2030 Poland Transportable Kidney Perfusion System Market Size and Market Volume List

Table 2020-2030 Poland Transportable Kidney Perfusion System Import & Export List

Table 2020-2030 Russia Transportable Kidney Perfusion System Market Size and Market Volume List

Table 2020-2030 Russia Transportable Kidney Perfusion System Import & Export List

Table 2020-2030 MEA Transportable Kidney Perfusion System Market Size and Market Volume List

Figure 2020-2030 MEA Transportable Kidney Perfusion System Market Size and CAGR

Figure 2020-2030 MEA Transportable Kidney Perfusion System Market Volume and CAGR

Table 2020-2030 MEA Transportable Kidney Perfusion System Demand List by Application

Table 2020-2025 MEA Transportable Kidney Perfusion System Key Players Sales List

Table 2020-2025 MEA Transportable Kidney Perfusion System Key Players Market Share List

Table 2020-2030 MEA Transportable Kidney Perfusion System Demand List by Type

Table 2020-2025 MEA Transportable Kidney Perfusion System Price List by Type

Table 2020-2030 Egypt Transportable Kidney Perfusion System Market Size and Market Volume List

Table 2020-2030 Egypt Transportable Kidney Perfusion System Import & Export List

Table 2020-2030 Israel Transportable Kidney Perfusion System Market Size and Market Volume List

Table 2020-2030 Israel Transportable Kidney Perfusion System Import & Export List

Table 2020-2030 South Africa Transportable Kidney Perfusion System Market Size and Market Volume List

Table 2020-2030 South Africa Transportable Kidney Perfusion System Import & Export List

Table 2020-2030 Gulf Cooperation Council Countries Transportable Kidney Perfusion System Market Size and Market Volume List

Table 2020-2030 Gulf Cooperation Council Countries Transportable Kidney Perfusion System Import & Export List

Table 2020-2030 Turkey Transportable Kidney Perfusion System Market Size and Market Volume List

Table 2020-2030 Turkey Transportable Kidney Perfusion System Import & Export List

Table 2020-2025 Global Transportable Kidney Perfusion System Market Size List by Region

Table 2020-2025 Global Transportable Kidney Perfusion System Market Size Share List by Region

Table 2020-2025 Global Transportable Kidney Perfusion System Market Volume List by Region

Table 2020-2025 Global Transportable Kidney Perfusion System Market Volume Share List by Region

Table 2020-2025 Global Transportable Kidney Perfusion System Demand List by Application

Table 2020-2025 Global Transportable Kidney Perfusion System Demand Market Share List by Application

Table 2020-2025 Global Transportable Kidney Perfusion System Key Vendors Sales List

Table 2020-2025 Global Transportable Kidney Perfusion System Key Vendors Sales Share List

Figure 2020-2025 Global Transportable Kidney Perfusion System Market Volume and Growth Rate

Table 2020-2025 Global Transportable Kidney Perfusion System Key Vendors Revenue List

Figure 2020-2025 Global Transportable Kidney Perfusion System Market Size and Growth Rate

Table 2020-2025 Global Transportable Kidney Perfusion System Key Vendors Revenue Share List

Table 2020-2025 Global Transportable Kidney Perfusion System Demand List by Type

Table 2020-2025 Global Transportable Kidney Perfusion System Demand Market Share List by Type

Table 2020-2025 Regional Transportable Kidney Perfusion System Price List

Table 2025-2030 Global Transportable Kidney Perfusion System Market Size List by Region

Table 2025-2030 Global Transportable Kidney Perfusion System Market Size Share List by Region

Table 2025-2030 Global Transportable Kidney Perfusion System Market Volume List by Region

Table 2025-2030 Global Transportable Kidney Perfusion System Market Volume Share List by Region

Table 2025-2030 Global Transportable Kidney Perfusion System Demand List by Application

Table 2025-2030 Global Transportable Kidney Perfusion System Demand Market Share List by Application

Table 2025-2030 Global Transportable Kidney Perfusion System Key Vendors Sales List

Table 2025-2030 Global Transportable Kidney Perfusion System Key Vendors Sales Share List

Figure 2025-2030 Global Transportable Kidney Perfusion System Market Volume and Growth Rate

Table 2025-2030 Global Transportable Kidney Perfusion System Key Vendors Revenue List

Figure 2025-2030 Global Transportable Kidney Perfusion System Market Size and Growth Rate

Table 2025-2030 Global Transportable Kidney Perfusion System Key Vendors Revenue Share List

Table 2025-2030 Global Transportable Kidney Perfusion System Demand List by Type

Table 2025-2030 Global Transportable Kidney Perfusion System Demand Market Share List by Type

Table 2025-2030 Transportable Kidney Perfusion System Regional Price List

Table Waters Medical System Information

Table SWOT Analysis of Waters Medical System

Table 2020-2025 Waters Medical System Transportable Kidney Perfusion System Sale Volume Price Cost Revenue

Figure 2020-2025 Waters Medical System Transportable Kidney Perfusion System Sale Volume and Growth Rate

Figure 2020-2025 Waters Medical System Transportable Kidney Perfusion System Market Share

Table Organ Assist Information

Table SWOT Analysis of Organ Assist

Table 2020-2025 Organ Assist Transportable Kidney Perfusion System Sale Volume Price Cost Revenue

Figure 2020-2025 Organ Assist Transportable Kidney Perfusion System Sale Volume and Growth Rate

Figure 2020-2025 Organ Assist Transportable Kidney Perfusion System Market Share

Table Shanghai Genext Medical Technology Information

Table SWOT Analysis of Shanghai Genext Medical Technology

Table 2020-2025 Shanghai Genext Medical Technology Transportable Kidney Perfusion System Sale Volume Price Cost Revenue

Figure 2020-2025 Shanghai Genext Medical Technology Transportable Kidney Perfusion System Sale Volume and Growth Rate

Figure 2020-2025 Shanghai Genext Medical Technology Transportable Kidney Perfusion System Market Share

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