

Polycystic Kidney Disease Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Autosomal dominant polycystic kidney disease (ADPKD), Autosomal recessive polycystic kidney disease (ARPKD), Others), By Treatment Type (Diagnosis, Drug/Therapy), By End User (Hospitals & Clinics, Ambulatory Care Centers, Others), By Region & Competition, 2021-2031F

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Abstracts

The Global Polycystic Kidney Disease Market is projected to expand from USD 616.11 Million in 2025 to USD 957.23 Million by 2031, reflecting a CAGR of 7.62%. This market sector encompasses pharmacotherapies, diagnostic imaging solutions, and genetic testing services aimed at managing the inherited condition defined by the formation of fluid-filled kidney cysts. The primary engines of this growth are the substantial rise in research investment and the rapid advancement of new therapeutic candidates intended to slow disease progression. Highlighting this trend, the PKD Foundation reported in 2024 that researchers obtained \$15.66 million in Congressionally Directed Medical Research Programs grants, marking a 347% surge in funding over the prior year.

Conversely, market growth confronts significant obstacles regarding the elevated expense of disease-modifying drugs and the strict safety monitoring protocols necessitated for current treatments. Regulatory authorities frequently require stringent risk evaluation measures for major medications due to the potential for liver toxicity, which can restrict patient access and hinder prescription adherence, ultimately curbing widespread market adoption.

Market Driver

The most significant force driving the Global Polycystic Kidney Disease Market is the approval and commercial uptake of innovative disease-modifying therapies. As healthcare providers increasingly utilize targeted vasopressin V2-receptor antagonists to retard cyst development in Autosomal Dominant Polycystic Kidney Disease (ADPKD), the sector's financial viability has grown substantially. This commercial success confirms the market potential for future innovations and supports continuous manufacturing to satisfy rising patient demand. For instance, Otsuka Holdings Co., Ltd. reported in its February 2025 'FY2024 Consolidated Financial Results' that pharmaceutical revenue climbed by 17.1% year-over-year, a rise largely driven by strong global sales of its primary ADPKD drug, Jynarque. This performance highlights the acute need for effective treatments and spurs further expansion into under-served international markets.

Simultaneously, a strong clinical pipeline and heavy investment in renal R&D are transforming the market's trajectory, moving the focus from treating symptoms to genetic modification. Biotech companies are raising significant funds to support trials for next-generation oligonucleotides, such as microRNA inhibitors, that address the disease's genetic roots. This innovation is bolstered by patient engagement initiatives that speed up trial recruitment and data gathering. In 2025, the PKD Foundation announced that its ADPKD Registry had grown to over 3,200 participants, offering a critical data source for expediting clinical research. The dedication to these pipelines is reflected in financial strategies; Regulus Therapeutics Inc. noted in its March 2025 'Fourth Quarter and Year-End 2024 Financial Results' that it held \$75.8 million in cash specifically to fund the clinical progression of its investigational ADPKD therapy, RGLS8429.

Market Challenge

The stringent safety monitoring requirements and high costs linked to disease-modifying therapies present a major constraint on the commercial growth of the Global Polycystic Kidney Disease Market. Regulatory bodies frequently enforce extensive risk evaluation protocols to address potential liver toxicity, introducing a complex administrative layer that impedes the prescription workflow. These logistical challenges place a heavier burden on healthcare practitioners and insurance providers, frequently resulting in authorization delays and limited formulary inclusion. As a result, the adoption of approved medications is suppressed, because the complexity of adhering to these

mandatory safety programs deters the general nephrology community, thereby narrowing the market reach of existing treatments.

This limitation on market access is particularly damaging considering the rising demand for specialized disease management. According to the PKD Foundation, its Centers of Excellence program attended to 15,600 patients in 2024, representing a 23% rise in individuals seeking specialized clinical care compared to the previous year. Despite this expanding patient population, the market cannot fully leverage the opportunity because rigorous financial and regulatory obstacles prevent a significant portion of these engaged patients from starting or sustaining long-term pharmacological therapy.

Market Trends

The move toward Genotype-Guided Precision Medicine is fundamentally altering market dynamics by emphasizing diagnostic precision and customized treatments over generalized management. This trend is fueled by the growing incorporation of comprehensive genetic panels into clinical nephrology, allowing for the early detection of disease subtypes and the creation of personalized care strategies. In its 'Q4 2024 Earnings Presentation' from February 2025, Natera, Inc. announced that total quarterly revenues jumped 53% year-over-year to \$476 million, a financial achievement that reflects the rapid uptake of its advanced genetic testing products, including those used for renal disorders.

At the same time, the rise of Novel Non-Vasopressin Pathway Modulators is broadening the therapeutic pipeline as developers attempt to reduce the tolerability issues linked to standard V2-receptor antagonists. By focusing on alternate metabolic pathways like AMPK activation, scientists hope to maintain kidney function without causing severe aquaretic side effects. This strategic shift is backed by ongoing development work; for example, Poxel SA reported in its October 2025 'Financial Results for Full Year 2024' that it secured consolidated revenue of EUR 6.6 million, capital that supports its operational commitment to progressing PXL770, its first-in-class AMPK activator for polycystic kidney disease.

Key Market Players

Otsuka Pharmaceuticals Co. Ltd

Camber Pharmaceuticals Inc.

Apotex Corp

Ascend Laboratories LLC

Par Pharmaceuticals Inc.

Teva Pharmaceutical Industries Ltd

Merck KGA

Accord Healthcare Inc.

Pfizer Inc.

PD-Rx Pharmaceuticals, Inc

Report Scope

In this report, the Global Polycystic Kidney Disease Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Polycystic Kidney Disease Market, By Type

Autosomal dominant polycystic kidney disease (ADPKD)

Autosomal recessive polycystic kidney disease (ARPKD)

Others

Polycystic Kidney Disease Market, By Treatment Type

Diagnosis

Drug/Therapy

Polycystic Kidney Disease Market, By End User

Hospitals & Clinics

Ambulatory Care Centers

Others

Polycystic Kidney Disease Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Polycystic Kidney Disease Market.

Available Customizations:

Global Polycystic Kidney Disease Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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