

Automated Peritoneal Dialysis Market Size and Forecast (2021 - 2034), Global and Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Product (Peritoneal Dialysis Solution, Peritoneal Dialysis Catheters, Peritoneal Dialysis Transfer Sets, and Others), End User (Hospital-Based Dialysis Units and Home Care Settings), and Geography (North America, Europe, Asia Pacific, Middle East and Africa, and South and Central America)

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Abstracts

The automated peritoneal dialysis market is projected to reach US\$1.50 billion by 2034 from US\$1.04 billion in 2025. The market is estimated to register a CAGR of 4.1% during 2026–2034. Major factors driving the market growth include the expanding home dialysis adoption and rising ESRD demands, product innovation and technological modernization, and clinical evidence and quality of life advantages that promote automated peritoneal dialysis utilization. Further, policy and reimbursement reforms supporting home dialysis and value-based care will likely boost the market during the forecast period. However, training, support, and infrastructure deficits for home modalities are among the market deterrents.

Technological innovation in automated dialysis devices and solutions remains a fundamental driver of the Automated Peritoneal Dialysis Market. Over the 2023–2025 period, manufacturers introduced and refined APD cyclers with enhanced usability, increased connectivity, remote monitoring, smart alarms, and improved fluid handling

algorithms, making them more suitable for at-home use even among patients with limited prior experience. These enhancements are critical, given that APD, unlike continuous ambulatory peritoneal dialysis (CAPD), often requires machine support for overnight automated exchanges that can improve adherence, fluid balance, and patient convenience.

While registry data, such as the Malaysian Dialysis & Transplant Registry, do not break down device models, the steady increase in APD utilization from ~14.4% of PD patients in 2022 to 16.5% in 2023 correlates with the broader availability of user-friendly APD technologies and reflects clinician confidence in these systems. Innovations such as remote treatment monitoring and smartphone-connected cyclers facilitate clinical oversight while maintaining patient independence, making APD more attractive to healthcare providers and payers.

Furthermore, advanced infectious control systems and safety features help address longstanding clinical concerns, enabling APD to be prescribed more confidently to patients with higher comorbidity burdens. Such product developments drive clinician preference for APD in markets such as North America and Europe, where integrated digital health tools are rapidly becoming standard in chronic care.

The comparative company analysis evaluates and categorizes the Automated Peritoneal Dialysis market based on product portfolio (product satisfaction, product features, and availability), recent market developments (merger & acquisition, new product launch & enhancement, investment & funding, award, agreement, collaboration, & partnership, recognition, and expansion), and geographic presence that aids better decision-making and understanding of the competitive landscape. The report profoundly explores the recent significant developments and innovations by the leading vendors in the global Automated Peritoneal Dialysis market. The key market players are Asahi Kasei Corp, Fresenius Medical Care AG & Co KGaA, Baxter International Inc, B. Braun Melsungen AG, Medtronic Plc, Terumo Corp, Utah Medical Products Inc, Angioplast, Becton Dickinson and Co, and Poly Medicure Ltd.

In terms of product, the automated peritoneal dialysis market is bifurcated into peritoneal dialysis solution, peritoneal dialysis catheters, peritoneal dialysis transfer sets, and others. The peritoneal dialysis solution segment held a larger market share in 2025, owing to acceptance due to recurring usage in every dialysis cycle, increasing patient population, advancements in biocompatible solutions, and rising preference for home-based dialysis treatments globally.

the automated peritoneal dialysis market is categorized into in-center dialysis settings, home care settings. The in-center dialysis settings segment held a larger share of the market in 2025. Higher patient monitoring, availability of trained staff, better management of complications, established reimbursement frameworks, access to advanced APD equipment, and preference for supervised treatment in critical cases drive in-center segment dominance.

Companies operating in the automated peritoneal dialysis market adopt various organic and inorganic strategies. Organic strategies mainly include product launches and product approvals. Inorganic growth strategies witnessed in the market are acquisitions, collaborations, and partnerships. These growth strategies allow the market players to expand their businesses, enhance their geographic presence, and contribute to the overall market growth. Furthermore, acquisitions and partnerships helped strengthen their customer base and extend their product portfolios. A few significant developments by key automated peritoneal dialysis market players are listed below.

In July 2025, Vantive Medical Technologies LLC, a US-based innovator in home dialysis systems, partnered with Innovative Renal Care Inc. Their goal is to advance the use of technology in home dialysis therapies. The collaboration will integrate connected digital tools, remote monitoring, and IoT-enabled devices into home dialysis workflows. These tools aim to improve patient outcomes, support care teams, and offer more personalized therapy management. Innovative Renal Care Inc. is a US-based provider of comprehensive kidney care.

In May 2025, Byonyks Inc., a US-based medical device company, received FDA 510(k) clearance for its X1 automated peritoneal dialysis (APD) cyclor. This device aims to improve the management of chronic kidney disease. The system provides user-friendly automation and precise control of dwell times, fluid volumes, and treatment cycles. It supports individualized therapy and reduces the effort required of patients and caregivers. This launch reflects the growing adoption of connected automated dialysis technologies for efficient treatment in both clinical and home settings.

Reason to buy

Saves and reduces time required for identifying the market growth, size, leading players, and segments in the global Automated Peritoneal Dialysis market.

Highlights key business priorities to assist companies in realigning their business strategies

Emphasizes key findings and recommendations that uncover emerging industry trends in the global Automated Peritoneal Dialysis market, enabling stakeholders across the value chain to craft effective long-term strategies

Develop/modify business expansion plans by analyzing substantial growth prospects in mature and emerging markets

Scrutinizes in-depth global Automated Peritoneal Dialysis market trends, along with factors driving the market, as well as those hindering it

Enhances the decision-making process by understanding the strategies that underpin commercial interest with respect to client products, segmentation, pricing, and distribution

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