

Kidney Preservation Market Size, Share and Growth Outlook 2026: By Preservation Method, By Solution Type, By Transplant Type, By End-User, Companies to 2034

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Abstracts

The global Kidney Preservation Market size is forecast to increase from \$320.62 Million in 2026 to \$586.45 Million in 2034 at a CAGR of 7.84% between 2026 and 2034.

The Kidney Preservation market report provides detailed analysis and outlook of Kidney Preservation segments including By Preservation Method (Static Cold Storage (SCS), Hypothermic Machine Perfusion (HMP), Normothermic Machine Perfusion (NMP)), By Solution Type (University of Wisconsin (UW) Solution, Histidine-Tryptophan-Ketoglutarate (HTK) Solution, Celsior Solution, Collins Solution and Other Preservation Fluids), By Transplant Type (Deceased Donor Transplants, Living Donor Transplants), By End-User (Organ Procurement Organizations (OPOs), Transplant Centers and Hospitals) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

Kidney Preservation Industry Overview

Organ Preservation Technologies Become Critical to Transplant Success

The Kidney Preservation Industry is experiencing growing importance as transplant centers seek to maximize donor organ utilization, improve graft survival, and address persistent shortages of transplantable kidneys. Preservation technologies play a fundamental role in maintaining organ viability between procurement and transplantation, directly influencing transplant outcomes and long-term graft function.

Rising demand for kidney transplantation, increasing use of extended-criteria donor organs, and efforts to reduce organ discard rates are driving innovation across preservation methods and perfusion technologies. Healthcare systems and transplant organizations are increasingly investing in advanced preservation strategies that extend organ viability while improving recipient outcomes.

Hypothermic Machine Perfusion Gains Clinical Validation

One of the most significant developments within the industry is the increasing adoption of Hypothermic Machine Perfusion as an enhancement to conventional preservation approaches. Clinical evidence published in 2026 demonstrated that sequential use of Hypothermic Machine Perfusion following initial static cold storage significantly reduced the incidence of delayed graft function compared with static cold storage alone. The reported reduction in delayed graft function rates provides strong support for broader adoption of machine perfusion technologies within transplant programs. By improving organ preservation quality and extending viable preservation windows, machine perfusion systems are helping transplant centers improve donor-recipient matching flexibility while enhancing post-transplant outcomes. These benefits are accelerating interest in advanced organ preservation platforms across global transplant networks.

Government Research Support Strengthens Innovation Pipeline

Public funding and institutional support remain important drivers of innovation within the kidney preservation market. Continued funding for kidney disease and transplantation research programs is helping accelerate development of next-generation preservation technologies, organ assessment tools, and transplant optimization strategies. Ongoing support for research initiatives through organizations such as the National Institute of Diabetes and Digestive and Kidney Diseases contributes to a strong scientific foundation for future advancements. These investments are enabling academic institutions, transplant centers, and biotechnology companies to pursue innovations that improve preservation efficiency, expand donor organ utilization, and address challenges associated with long-term graft survival.

Xenotransplantation Advances Create New Opportunities for Preservation Technologies

The kidney preservation industry is also being influenced by emerging developments in xenotransplantation research. Scientific progress involving genetically engineered donor pigs with reduced immunogenicity is moving the field closer to potential human clinical applications. Research highlighting the development of low-immunogenicity grafts such

as GalTKO donor organs indicates that renal xenotransplantation may become a realistic strategy for addressing the global shortage of donor kidneys. As these technologies advance, preservation systems will play a critical role in maintaining organ viability throughout procurement, transportation, and transplantation processes. The potential expansion of transplantable organ sources could significantly increase demand for sophisticated preservation technologies, creating new growth opportunities across the kidney preservation ecosystem.

Kidney Preservation Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Kidney Preservation market is witnessing increasing investments in innovation, product development, digital transformation, artificial intelligence integration, healthcare infrastructure expansion, and strategic partnerships across developed and emerging economies. Key Companies in the industry include- XVIVO Perfusion AB, Organ Recovery Systems Inc., TransMedics Inc., Getinge AB, OrganOx Limited, Baxter International Inc., Fresenius Medical Care AG & Co. KGaA, B. Braun Melsungen AG, Bridge to Life Ltd., Waters Medical Systems. The Kidney Preservation market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the Kidney Preservation industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

- Growth Kidney Preservation Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

- Market Trends, Drivers, Potential Opportunities, and Challenges faced by Kidney Preservation companies

- Porter's Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

- Detailed SWOT Analysis of global and regional Kidney Preservation markets

- Competitive analysis including business description, product analysis, and

financial profiles

Key country specific analysis detailing key factors shaping the short-term and long-term outlook

Recent industry developments and news including mergers, acquisitions, product launches, expansions, and company announcements

Kidney Preservation Market Competitive Benchmarking and Company Analysis

Leading companies in Kidney Preservation industry include- XVIVO Perfusion AB, Organ Recovery Systems Inc., TransMedics Inc., Getinge AB, OrganOx Limited, Baxter International Inc., Fresenius Medical Care AG & Co. KGaA, B. Braun Melsungen AG, Bridge to Life Ltd., Waters Medical Systems. The Kidney Preservation market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US Kidney Preservation Markets in 2026 and beyond- Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach \$8.2 Trillion in 2034 from \$5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the Kidney Preservation market remains one of the strongest-performing segments in the country.

The US Kidney Preservation Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance efficiency and cost management. The US Kidney Preservation market faces successive waves of challenging trends, with strong opportunities across select segments. The CMS plan to implement Medicaid from 2027 is driving states to build

eligibility verification systems throughout 2026. Looking ahead to 2034, we anticipate stronger results underpinned by opportunities exist across Kidney Preservation industry. On the medical device front, over 7,000 device manufacturers continue to gain from increasing demand from demand for implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of Canadian Kidney Preservation markets

Canada's strong Kidney Preservation sales performance is underpinned by an aging population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-sized enterprises across medical, diagnostic, and therapeutic devices. The Canadian Kidney Preservation market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany Kidney Preservation Trends and Perspectives to 2034- Financial sustainability, hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest Kidney Preservation market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering 90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of Kidney Preservation population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Kidney Preservation industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the Kidney Preservation market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support Kidney Preservation sales through 2034

France Kidney Preservation companies are emphasizing on opportunities for rapid, at-

scale innovation to boost profitability over the long-term. The country's National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease management initiatives, workforce reforms, and efforts to improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics. INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were 651,000, producing a negative natural balance of about 6,000 for the first time since the end of the Second World War.

UK Kidney Preservation Market Size, Share, and Growth Projections to 2034- Rapid growth driven by new and existing brands across the industry value chain

Small high-need consumer segments remain key priority of Kidney Preservation distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or ?280 billion in 2025. According to the ONS, total healthcare spending grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was ?49 billion (14.1%) and voluntary health insurance was ?9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England's plan to give more than 500,000 staff access to new AI tools.

China Kidney Preservation Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

China Kidney Preservation market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of Kidney Preservation industry, offering opportunities for both competition and partnership. Over the forecast period, new and innovative product launches remain key elements driving market outlook. China's healthcare industry is increasingly centered on expanding healthcare capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China's basic medical insurance covered 1.32662 billion people and the coverage rate was 95%. Regional disparities in consumer spending trends continue to become more pronounced in the Chinese Kidney Preservation industry. Over the forecast period, demand will keep shifting toward geriatrics, chronic disease management, rehabilitation, long-term care, and outpatient care, while pricing pressure will remain intense in drugs and consumables because reimbursement.

India Kidney Preservation Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian Kidney Preservation market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to make world-class diagnostics, robotics, and critical care devices.

Brazil Kidney Preservation market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts, with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

Middle East and Africa Kidney Preservation Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500 million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader MEA region one of the fastest-growing healthcare demand centers globally. The GCC countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to account for a disproportionately large share of regional healthcare spending.

Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria, and Kenya remain key healthcare markets due to their large populations, expanding private healthcare sectors, and growing investments in healthcare delivery systems.

Kidney Preservation Market Segmentation

By Preservation Method

Static Cold Storage (SCS)

Hypothermic Machine Perfusion (HMP)

Normothermic Machine Perfusion (NMP)

By Solution Type

University of Wisconsin (UW) Solution

Histidine-Tryptophan-Ketoglutarate (HTK) Solution

Celsior Solution

Collins Solution and Other Preservation Fluids

By Transplant Type

Deceased Donor Transplants

Living Donor Transplants

By End-User

Organ Procurement Organizations (OPOs)

Transplant Centers and Hospitals

Leading Companies in Kidney Preservation Industry (2026)

XVIVO Perfusion AB

Organ Recovery Systems Inc.

TransMedics Inc.

Getinge AB

OrganOx Limited

Baxter International Inc.

Fresenius Medical Care AG & Co. KGaA

B. Braun Melsungen AG

Bridge to Life Ltd.

Waters Medical Systems

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia,
Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa,
Other Africa

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