

Kidney Transplant Market Size, Share and Growth Outlook 2026: By Transplant, By Preservation Method, By Surgical Procedure, By Patient Age Group, By End User, Companies to 2034

<https://marketpublishers.com/r/KFDF485B6452EN.html>

Date: July 2026

Pages: 190

Price: US\$ 3,482.00 (Single User License)

ID: KFDF485B6452EN

Abstracts

The global Kidney Transplant Market size is forecast to increase from \$10.53 Billion in 2026 to \$18.54 Billion in 2034 at a CAGR of 7.33% between 2026 and 2034.

The Kidney Transplant market report provides detailed analysis and outlook of Kidney Transplant segments including By Transplant (Deceased Donor Transplants, Donation after Brain Death (DBD), Donation after Circulatory Death (DCD), Living Donor Transplants, Related/Directed Living Donation, Unrelated/Non-Directed Altruistic Donation, Paired Kidney Exchange), By Preservation Method (Static Cold Storage (SCS), Hypothermic Machine Perfusion (HMP), Normothermic Machine Perfusion (NMP)), By Surgical Procedure (Open Kidney Transplant, Minimally Invasive / Robotic-Assisted Kidney Transplant), By Patient Age Group (Adult, Pediatric), By End User (Hospitals, Specialized Transplant Centers, Academic and Clinical Research Institutes) 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 Transplant Industry Overview

Next-Generation Immunomodulation Strategies Transform Kidney Transplant Care

The Kidney Transplant industry is entering a period of significant innovation driven by advances in immunology, precision therapeutics, graft preservation, and long-term transplant management. While kidney transplantation remains the preferred treatment

option for many patients with end-stage renal disease, the industry continues to focus on reducing graft rejection, minimizing immunosuppressive toxicity, and improving long-term graft survival. Research efforts are increasingly directed toward targeted immune modulation strategies that can preserve transplant function while reducing dependence on broad-spectrum immunosuppressive regimens. Pharmaceutical developers, transplant centers, and academic institutions are investing in therapies that address both acute rejection risks and chronic allograft injury, creating a more personalized approach to post-transplant care.

Novel Targeted Therapies Expand the Post-Transplant Treatment Pipeline

The transplant therapeutics landscape is becoming increasingly diverse with the development of targeted biological agents designed to improve immune regulation. Tonix Pharmaceuticals advanced development of TNX-1500, a dimeric Fc-modified anti-CD40L monoclonal antibody being evaluated for kidney transplant recipients through a Phase 2 clinical study conducted in collaboration with Massachusetts General Hospital. The therapy is designed to reduce reliance on calcineurin inhibitors, which remain associated with long-term nephrotoxicity and other adverse effects. At the same time, Biogen continues to expand its nephrology and transplant portfolio through extensive clinical development programs. Data presented at major international nephrology and transplant congresses highlighted ongoing evaluation of pegcetacoplan pharmacokinetics in both native and transplanted kidneys, alongside progress in multiple Phase 3 studies involving the investigational transplant therapy felzartamab. These programs reflect growing industry emphasis on precision immunology and targeted intervention strategies within transplantation medicine.

Immune Tolerance Research Creates Pathways Beyond Lifelong Immunosuppression

One of the most transformative developments in kidney transplantation involves efforts to induce durable immune tolerance. Clinical research led by investigators at the Mayo Clinic demonstrated promising outcomes through a combined kidney and donor-derived stem cell transplantation approach. In the multicenter study, the vast majority of participants successfully discontinued conventional immunosuppressive medications after transplantation, with a substantial proportion remaining free from long-term immunosuppressive therapy for extended periods. These findings highlight the potential for immune tolerance strategies to fundamentally alter transplant management by reducing dependence on lifelong drug regimens. As transplant programs continue to explore cellular therapies, immune reprogramming techniques, and targeted biologics, the industry is moving toward treatment models focused on preserving graft function

while minimizing chronic medication burden and associated complications.

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

The global Kidney Transplant 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- Novartis AG, AbbVie Inc., TransMedics, Inc., Roche Diagnostics, Medtronic plc, Organ Recovery Systems, Paragonix Technologies, Inc., Bridge to Life Ltd., Xvivo Perfusion AB, CareDx, Inc.. The Kidney Transplant 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 Transplant industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

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

- Market Trends, Drivers, Potential Opportunities, and Challenges faced by Kidney Transplant 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 Transplant 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 Transplant Market Competitive Benchmarking and Company Analysis

Leading companies in Kidney Transplant industry include- Novartis AG, AbbVie Inc., TransMedics, Inc., Roche Diagnostics, Medtronic plc, Organ Recovery Systems, Paragonix Technologies, Inc., Bridge to Life Ltd., Xvivo Perfusion AB, CareDx, Inc.. The Kidney Transplant 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 Transplant 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 Transplant market remains one of the strongest-performing segments in the country.

The US Kidney Transplant 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 Transplant 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 Transplant 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 Transplant markets

Canada's strong Kidney Transplant 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 Transplant 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 Transplant 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 Transplant 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 Transplant population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Kidney Transplant 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 Transplant market outlook.

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

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

China Kidney Transplant 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 Transplant 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 Transplant 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 Transplant 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 Transplant 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 Transplant 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 Transplant 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 Transplant Market Segmentation

By Transplant

Deceased Donor Transplants

Donation after Brain Death (DBD)

Donation after Circulatory Death (DCD)

Living Donor Transplants

Related/Directed Living Donation

Unrelated/Non-Directed Altruistic Donation

Paired Kidney Exchange

By Preservation Method

Static Cold Storage (SCS)

Hypothermic Machine Perfusion (HMP)

Normothermic Machine Perfusion (NMP)

By Surgical Procedure

Open Kidney Transplant

Minimally Invasive / Robotic-Assisted Kidney Transplant

By Patient Age Group

Adult

Pediatric

By End User

Hospitals

Specialized Transplant Centers

Academic and Clinical Research Institutes

Leading Companies in Kidney Transplant Industry (2026)

Novartis AG

AbbVie Inc.

TransMedics, Inc.

Roche Diagnostics

Medtronic plc

Organ Recovery Systems

Paragonix Technologies, Inc.

Bridge to Life Ltd.

Xvivo Perfusion AB

CareDx, Inc.

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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