

Global Renal Dialysis Equipment - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 115 pages | Mordor Intelligence

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Report description:

Global Renal Dialysis Equipment Market Analysis

The renal dialysis equipment market was valued at USD 22.40 billion in 2025 and is forecast to expand to USD 29.27 billion by 2030, advancing at a 5.5% CAGR. Demographic aging, rising diabetes prevalence, and chronic kidney disease (CKD) incidence are sustaining demand, while Medicare's 2025 End-Stage Renal Disease (ESRD) payment update and similar reimbursement reforms worldwide are accelerating a shift from in-center delivery models to home-based care. Leading manufacturers are introducing compact, water-efficient machines that lower infrastructure needs, and service providers are investing in AI-enabled predictive maintenance to minimize downtime and improve clinical outcomes. Supply-chain resilience and environmental sustainability have become strategic priorities following recent raw-material shortages and tougher regulations on single-use plastics. Concurrently, capital inflows into wearable and portable sorbent-based devices point to a medium-term transition toward patient-centric, resource-light treatment paradigms.

Global Renal Dialysis Equipment Market Trends and Insights

Growing Demand for Peritoneal Dialysis

Peritoneal dialysis use is rising as clinical evidence confirms survival rates comparable to in-center hemodialysis and highlights lower infection exposure for patients treated at home. The United States Renal Data System (USRDS) reported a 70% jump in incident home-dialysis starts between 2012 and 2022, supported by Medicare's 2025 ESRD Treatment Choices Model incentives .

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Latin America illustrates the trend, with Mexico accounting for one-quarter of the world's peritoneal population. Nonetheless, access gaps driven by limited surgical training and patient education persist in several regions. Clinical societies now recommend early modality education to lift adoption, and device makers are launching automated cyclers that simplify set-up and monitoring.

Growth in R&D Expenditure for New Dialysis Products

Top manufacturers have earmarked multi-year R&D budgets to upgrade dialysis platforms. Fresenius Medical Care secured FDA clearance for its 5008X system, which delivers high-volume hemodiafiltration and targets replacement of legacy machines. Vantive, the newly spun-out Baxter kidney-care entity, plans USD 1 billion of investment over five years to commercialize portable and implantable technologies. Academic groups add momentum: the University of Portsmouth demonstrated predictive-maintenance algorithms that cut machine downtime by 30%, while Seoul National University is advancing nano-electrokinetic pumps for compact peritoneal units. Funding programs such as KidneyX have awarded USD 17 million since 2023, ensuring a steady pipeline of projects.

Complications & Risks Associated with Dialysis Procedures

Safety alerts issued by the FDA in 2024 detailed toxic-compound leaching from silicone tubing in pediatric circuits, prompting rapid redesigns and material substitutions [fda.gov](https://www.fda.gov). Vascular-access infection remains a leading cause of hospitalization; the CMS ESRD Measures Manual showed that catheter use correlated with higher sepsis rates than arteriovenous fistulas. Peritoneal dialysis peritonitis is declining but continues to deter clinicians in settings with limited training. These complications inflate treatment costs and can delay therapy initiation, slowing overall equipment uptake.

Other drivers and restraints analyzed in the detailed report include:

Increasing Prevalence of Chronic Kidney Disease (CKD) / Adoption of Portable Sorbent-Based Dialysis Systems / Reimbursement Limitations in Emerging Markets /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Hemodialysis machines, water-treatment systems, and ancillary disposables accounted for 56.41% of renal dialysis equipment market share in 2024 underpinned by decades of installed infrastructure and clinician familiarity. The 5008X high-volume hemodiafiltration unit is expected to refresh fleets across major U.S. providers, signaling sustained investment in conventional platforms. In contrast, peritoneal dialysis cyclers are forecast to post a 6.78% CAGR, buoyed by payer incentives and advances in user-friendly interfaces. Automated cyclers equipped with remote telemetry are expanding uptake among elderly and rural patients, and new biocompatible solutions are reducing peritonitis rates. Concentrates and solutions also benefit from CMS policy changes that bring oral phosphate binders into the bundled payment, enlarging adjunct revenue streams.

Peritoneal equipment momentum is strongest in Mexico, China, and the United States, where transitional care units guide candidates through modality selection. Supply-chain tightness for plastic bloodlines and cartridges spotlighted the need for multi-source procurement strategies, yet manufacturers with vertically integrated resin capacity are navigating disruptions better than peers. Sustainability targets are accelerating a shift to recyclable cartridges, and research consortia are trialing plant-based polymers for dialyzer housings. As home uptake rises, after-sales service and 24-hour technical support emerge as key competitive differentiators.

The Renal Dialysis Equipment Market Report Segments the Industry Into by Product Type (Hemodialysis (HD) Equipment,

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Peritoneal Dialysis (PD) Equipment, and More), by Application (Hemodialysis, Peritoneal Dialysis), by End User (In-Center Dialysis Settings, Home Care Settings), and Geography. The Market Sizes and Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America retained 43.46% of the renal dialysis equipment market in 2024 thanks to robust reimbursement, extensive clinic networks, and rapid device approvals. Medicare spent USD 75 billion on CKD beneficiaries in 2024, and CMS raised the ESRD base rate to USD 273.82 in 2025, directly boosting provider capital budgets. Canada's single-payer model guarantees nationwide dialysis coverage, while Mexico leads peritoneal usage globally due to sustained policy backing. Although Hurricane-related disruptions to a key North Carolina dialyzer plant exposed supply chain concentration, FDA emergency-use authorizations enabled alternative sourcing, prompting manufacturers to diversify footprints.

Europe constitutes the second-largest region, characterized by strict environmental directives that favor low-water, low-waste systems. National health services in Germany, France, and the United Kingdom fund universal access, and the European Renal Association promotes cross-border clinical guidelines to harmonize quality standards. Italy's nephrology society published a ten-step green framework in 2024, encouraging dialyzer reprocessing and renewable-energy adoption within clinics. Regulatory updates aligning ISO 23500 water-purity limits with AAMI guidelines are pushing vendors to upgrade filtration modules across the installed base.

Asia-Pacific is the fastest-growing territory at a projected 7.14% CAGR. Japan records the world's highest ESRD prevalence and maintains sophisticated reimbursement for thrice-weekly in-center hemodialysis. China and India face a 66% access gap, representing the largest latent demand pool. Government-led insurance expansions, private-equity investment in dialysis chains, and public-private partnerships for rural outreach are narrowing disparities. Australia and South Korea showcase near-universal coverage and are early adopters of tele-monitored home systems. Multinationals are increasingly establishing localized assembly plants to meet price-sensitive segments and qualify for procurement tenders.

List of Companies Covered in this Report:

Fresenius / Baxter / Nipro / B. Braun / Nikkiso Co. Ltd. / Asahi Kasei / Medtronic / Rockwell Medical / Teleflex / Cantel Medical (Medivators) / Toray Medical Co. Ltd. / Hemoclean Co. Ltd. / Quanta Dialysis Technologies / Outset Medical / DaVita / Diaverum AB / NxStage Medical (Fresenius subsidiary) / Dialife SA / Guangdong Biolight Meditech / Mitra Industries /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

Table of Contents:

- 1 Introduction
 - 1.1 Study Assumptions & Market Definition
 - 1.2 Scope of the Study
- 2 Research Methodology
- 3 Executive Summary
- 4 Market Landscape

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- 4.1 Market Overview
- 4.2 Market Drivers
 - 4.2.1 Growing Demand for Peritoneal Dialysis
 - 4.2.2 Growth in R&D Expenditure for New Dialysis Products
 - 4.2.3 Increasing Prevalence of Chronic Kidney Disease (CKD)
 - 4.2.4 Adoption of Portable Sorbent-Based Dialysis Systems
 - 4.2.5 AI-Enabled Predictive Maintenance in Dialysis Machines
 - 4.2.6 Net-Zero Water-less Dialysis Technologies
- 4.3 Market Restraints
 - 4.3.1 Complications & Risks Associated with Dialysis Procedures
 - 4.3.2 Reimbursement Limitations in Emerging Markets
 - 4.3.3 Volatile Supply of Medical-grade Polymer Resins
 - 4.3.4 Regulatory Scrutiny on Single-Use Plastic Waste
- 4.4 Value / Supply-Chain Analysis
- 4.5 Regulatory Landscape
- 4.6 Technological Outlook
- 4.7 Porter's Five Forces Analysis
 - 4.7.1 Threat of New Entrants
 - 4.7.2 Bargaining Power of Buyers
 - 4.7.3 Bargaining Power of Suppliers
 - 4.7.4 Threat of Substitutes
 - 4.7.5 Competitive Rivalry

5 Market Size & Growth Forecasts (Value)

- 5.1 By Product Type
 - 5.1.1 Hemodialysis (HD) Equipment
 - 5.1.1.1 Dialysis Machines
 - 5.1.1.2 Dialyzers
 - 5.1.1.3 Bloodlines & Tubing Sets
 - 5.1.1.4 Water Treatment Systems
 - 5.1.2 Peritoneal Dialysis (PD) Equipment
 - 5.1.2.1 Automated PD Cyclers
 - 5.1.2.2 Portable PD Devices
 - 5.1.3 Concentrates & Solutions
 - 5.1.4 Other Accessories
- 5.2 By Application
 - 5.2.1 Hemodialysis
 - 5.2.1.1 Conventional HD
 - 5.2.1.2 Short-Daily HD
 - 5.2.1.3 Nocturnal HD
 - 5.2.2 Peritoneal Dialysis
 - 5.2.2.1 CAPD
 - 5.2.2.2 APD
- 5.3 By End User
 - 5.3.1 In-Center Dialysis Settings
 - 5.3.2 Home-Care Settings
- 5.4 By Geography

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- 5.4.1 North America
 - 5.4.1.1 United States
 - 5.4.1.2 Canada
 - 5.4.1.3 Mexico
- 5.4.2 Europe
 - 5.4.2.1 Germany
 - 5.4.2.2 United Kingdom
 - 5.4.2.3 France
 - 5.4.2.4 Italy
 - 5.4.2.5 Spain
 - 5.4.2.6 Rest of Europe
- 5.4.3 Asia-Pacific
 - 5.4.3.1 China
 - 5.4.3.2 Japan
 - 5.4.3.3 India
 - 5.4.3.4 Australia
 - 5.4.3.5 South Korea
 - 5.4.3.6 Rest of Asia-Pacific
- 5.4.4 Middle East & Africa
 - 5.4.4.1 GCC
 - 5.4.4.2 South Africa
 - 5.4.4.3 Rest of Middle East & Africa
- 5.4.5 South America
 - 5.4.5.1 Brazil
 - 5.4.5.2 Argentina
 - 5.4.5.3 Rest of South America

6 Competitive Landscape

6.1 Market Concentration

6.2 Market Share Analysis

6.3 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share, Products & Services, Recent Developments)

6.3.1 Fresenius Medical Care AG & Co. KGaA

6.3.2 Baxter International Inc.

6.3.3 Nipro Corporation

6.3.4 B. Braun Melsungen AG

6.3.5 Nikkiso Co. Ltd.

6.3.6 Asahi Kasei Corporation

6.3.7 Medtronic plc

6.3.8 Rockwell Medical Inc.

6.3.9 Teleflex Incorporated

6.3.10 Cantel Medical (Medivators)

6.3.11 Toray Medical Co. Ltd.

6.3.12 Hemoclean Co. Ltd.

6.3.13 Quanta Dialysis Technologies

6.3.14 Outset Medical Inc.

6.3.15 DaVita Inc.

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- 6.3.16 Diaverum AB
- 6.3.17 NxStage Medical (Fresenius subsidiary)
- 6.3.18 Dialife SA
- 6.3.19 Guangdong Biolight Meditech
- 6.3.20 Mitra Industries

7 Market Opportunities & Future Outlook

7.1 White-space & Unmet-Need Assessment

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