

Newer binders are transforming chronic hyperkalemia market

Market Trend Summary

Newer binders are reshaping chronic hyperkalemia management

Evolving treatment landscape

- Sodium polystyrene sulfonate (Kayexalate and generics) and calcium polystyrene sulfonate (Calcium Resonium / Kalimate) have dominated hyperkalemia treatment; however, their long-term effectiveness is constrained by tolerability, GI safety concerns, and treatment burden.
- Veltassa (patiomer) and Lokelma (sodium zirconium cyclosilicate) have reshaped chronic hyperkalemia management by offering improved tolerability compared with older polystyrene-based binders, which results in improved adherence and persistence for sustained potassium control and RAASi continuation in high-risk chronic kidney disease, heart failure, and diabetes populations.
- Clinical practice is broadly aligned with KDIGO CKD guidelines, which consistently emphasize correction of reversible causes and use of potassium-lowering strategies before reducing or discontinuing RAASi / MRA therapy, supporting broader use of newer binders in chronic hyperkalemia management.

Market entry of newer potassium binders

	Veltassa	Lokelma
United States	December 2015	December 2018
France	January 2026	February 2026
Germany	April 2018	April 2021
Italy	September 2021	December 2020
Spain	September 2019	May 2021
United Kingdom	August 2017	March 2019
Japan	March 2025	May 2020

KOL insight: preference shift

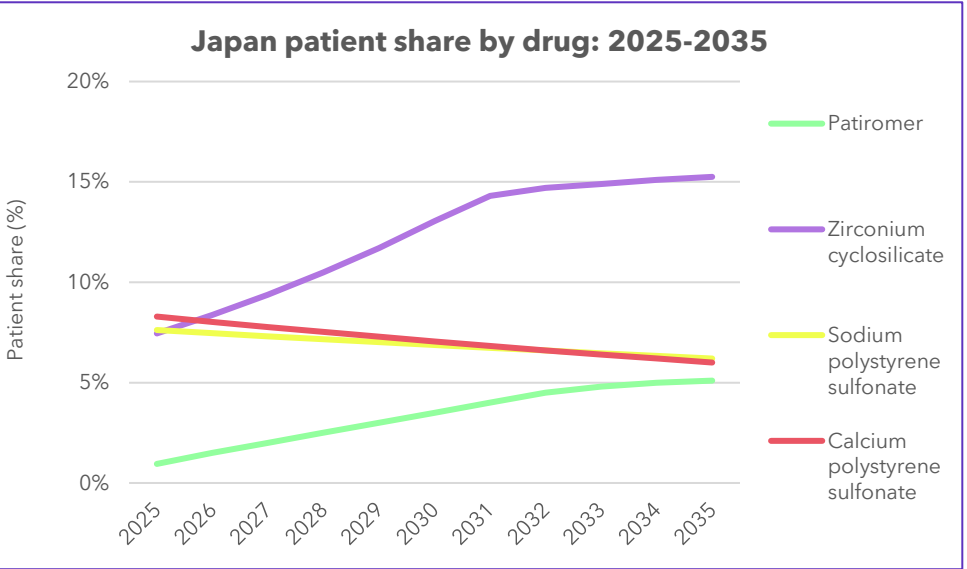
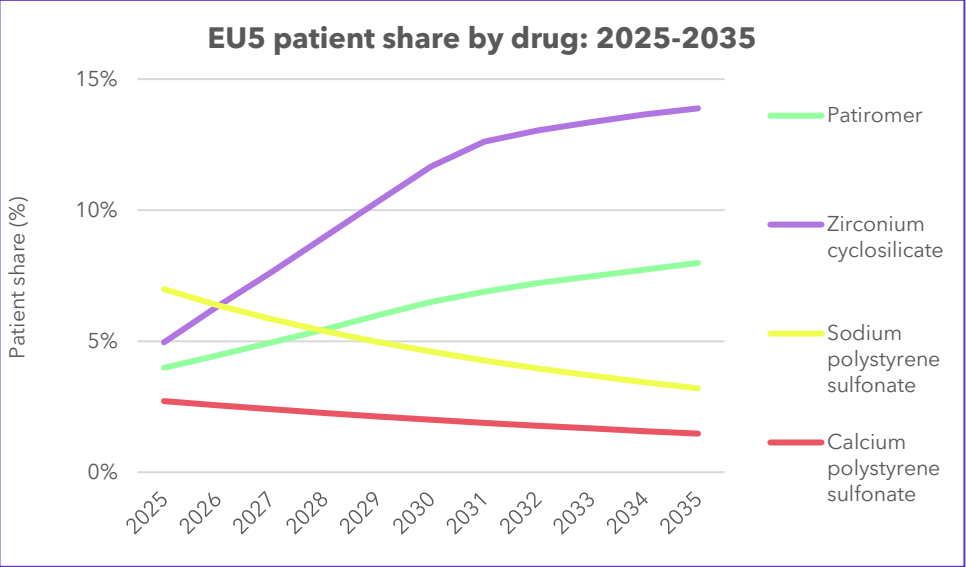
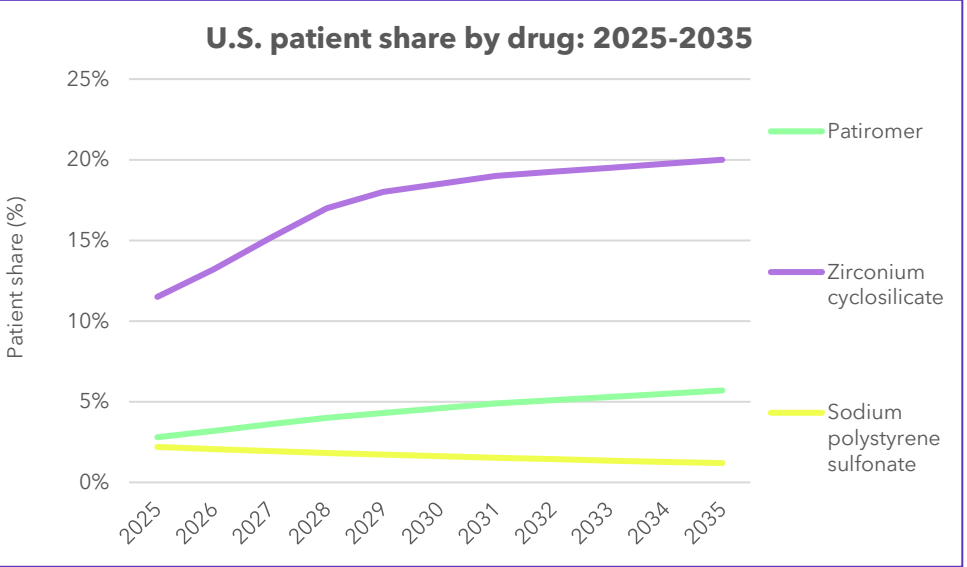
“There were concerns with the use of Kayexalate and adverse effect of ischemic bowel. Lokelma and Veltassa have good evidence in terms of effectiveness. Previously, we used Veltassa more because that was the one more readily available. However, it was a bit slow in terms of its onset of effect. Over time, almost all of our prescriptions for hyperkalemia have been using Lokelma because of its more rapid onset and effectiveness.” – Nephrologist, United States

“We have moved away from the polystyrene sulfonates because of their side effects. We have moved on to use sodium zirconium cyclosilicate and patiomer.” – Nephrologist, United Kingdom

“A shift toward Lokelma and patiomer is already evident and use of Kayexalate is decreasing.” –Nephrologist, Japan

Newer binders gain share as use of older potassium binders declines

Market Trend Summary



Forecast implications of the clinical shift

- Newer binders' uptake will rise across the United States, EU5, and Japan from 2025 to 2035.
- Sodium zirconium cyclosilicate will capture a larger patient share than patiromer because of perceived advantages in onset, convenience, and potassium-lowering effect.
- Older potassium binders will lose share as clinicians shift patients toward better-tolerated newer options.

KOL insight: older binder use expected to decline

"Sodium and calcium polystyrene sulfonate use will decline in the future because they are badly tolerated by patients and cause GI side effects. They are horrible to take and very unpleasant. So, patients do not take it for more than a few days." –Nephrologist, United Kingdom

"A shift toward Lokelma is being observed. The use of Kayexalate is expected to decline significantly. It will likely be discontinued, and once the remaining stock is depleted, new prescriptions will no longer be possible." –Nephrologist, Japan

Significant sales growth for potassium binders

- Sodium zirconium cyclosilicate will remain the largest sales contributor throughout the forecast period, supported by higher patient share across key markets.
- Branded sales expand through the early forecast period until their generic versions enter the market.

Generic entry

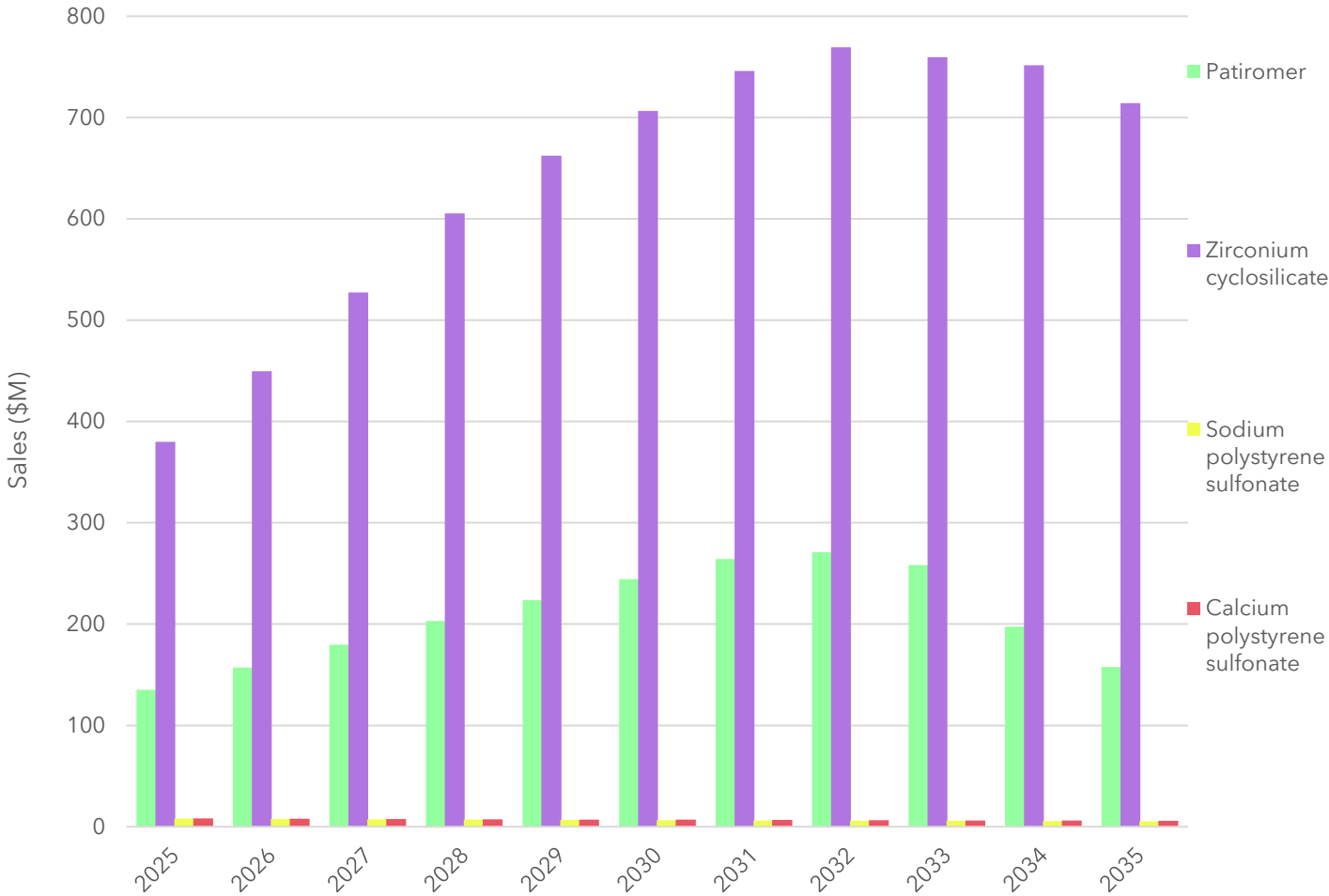
Veltassa		Lokelma	
	2033		2035
	2032		2033
	2034		2035

KOL insight: chronic use is shifting toward Lokelma and Veltassa

“Patiromer use has gone down and the use of sodium zirconium cyclosilicate has increased as sort of the main go-to medication for potassium binders.” –Nephrologist, United States

“Lokelma is easier to take and has a strong potassium lowering effect, so I evaluate it more favorably.” –Nephrologist, Japan

Major-market sales by potassium binder: 2025-2035



Lokelma and Veltassa are anchoring long-term management

Market Trend Summary

As treatment decisions increasingly prioritize tolerability, convenience, and cardio-renal treatment continuity, newer binders will gain share, while sodium polystyrene sulfonate / calcium polystyrene sulfonate remain largely cost-driven options.

Clarivate's takeaways

↔ **Newer binders are shifting chronic hyperkalemia toward long-term management**

Greater focus on sustained potassium control in chronic kidney disease, heart failure, and diabetes patients who require ongoing RAASi / MRA therapy positions Lokelma and Veltassa as chronic-management tools.

\$ **Older potassium binders will retain a limited role in cost-sensitive and short-duration use**

Sodium polystyrene sulfonate and calcium polystyrene sulfonate will remain relevant to a small extent because of their low cost, familiarity, and broad availability. However, KOL feedback and Clarivate's forecast trends indicate continued erosion in chronic-use share as clinicians favor better-tolerated branded options for patients needing sustained potassium management.

|| **Lokelma remains the leading branded option**

Clarivate's forecast trends indicate stronger patient-share and sales growth for Lokelma than Veltassa, supported by KOL preference for Lokelma in several markets. Veltassa uptake will expand as it becomes more established in newer launch markets, including Japan and France.

↗ **Commercial upside will depend on RAASi optimization and generic entry timing**

With no near-term novel potassium binder to materially disrupt Lokelma or Veltassa in the major markets (United States, France, Germany, Italy, Spain, United Kingdom, Japan), total market growth will continue until generic versions enter.

About the author



Vidhi Khosla, M.B.A., M.Sc.

Senior Healthcare Research & Data Analyst

DRG Commercial Solutions

Vidhi Khosla is an experienced healthcare and pharmaceutical research professional with a strong background in consulting, analytics, and strategic insights. She has worked across a diverse range of therapy areas, including metabolic disorders, rare diseases, neurology, and women's health. Vidhi holds a bachelor's and a master's degree in Biochemistry (gold medalist) from Delhi University and Kurukshetra University, respectively. She also completed her M.B.A. from Symbiosis International University, further strengthening her expertise.

Clarivate coverage of hyperkalemia

- Hyperkalemia | Disease Landscape & Forecast | last updated in July 2026
- Hyperkalemia | Treatment Algorithms: Claims Data Analysis | US | published in March 2026



Think forward™

Have a question?

ish.support@clarivate.com
clarivate.com

+1 215 386 0100 (U.S.)
+44 (0) 20 7433 4000 (Europe)

About Clarivate

Clarivate is a leading global provider of transformative intelligence. We offer enriched data, insights & analytics, workflow solutions and expert services in the areas of Academia & Government, Intellectual Property and Life Sciences & Healthcare. For more information, please visit clarivate.com.

© 2026 Clarivate. All rights reserved

Clarivate and its logo, as well as all other trademarks used herein are trademarks of their respective owners and used under license.