

# **Global Dialysis Market: Analysis By Number of Patients, By Product & Services (Services, Consumables, and Equipment), By Type (Hemodialysis and Peritoneal Dialysis), By End-User (In Center Dialysis and Home Dialysis), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2027**

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## **Abstracts**

The global dialysis market was valued at US\$98.30 billion in 2021. The market value is expected to reach US\$130.23 billion by 2027. Dialysis is a procedure to remove waste products and excess fluid from the blood when the kidneys stop working properly. It often involves diverting blood to a machine to be cleaned. Dialysis prevents the waste products in the blood from reaching hazardous levels. It can also remove toxins or drugs from the blood in an emergency setting.

The factors such as the growing number of patients suffering from diabetes, increasing healthcare expenditure and rising awareness regarding kidney diseases and their treatment are expected to drive the overall market growth in the forecasted period. The market is expected to grow at a CAGR of approx. 4.8% during the forecasted period of 2022-2027.

### **Market Segmentation Analysis:**

**By Product and Services:** The report provides the bifurcation of the market into three segments based on the product and services: Services, Consumables, and Equipment. In 2021, the services held the share of more than 80% in the market, whereas, the consumables are expected to be the fastest growing segment with a CAGR of around

5.4% in the forecasted period owing to an increase in the number of people receiving dialysis treatment due to favorable reimbursement systems, the development of improved products, and improved healthcare infrastructure.

**By Type:** The report further provides the segmentation based on the type: Hemodialysis and Peritoneal Dialysis. The hemodialysis segment held the highest share of around 90% in the market. The market's expansion is aided by the rise in the incidence of kidney failure and end-stage renal disease (ESRD).

**By End-User:** The report provides an analysis of the market based on end-user: In-Center Dialysis and Home Dialysis. The home dialysis segment is expected to be the highest-growing segment with a CAGR of approx. 4.7% in the forecasted period. From the safety point of view and owing to the continuous advancement in technology, a paradigm shift towards home dialysis treatments & telehealth is expected to better respond to chronic kidney disease (CKD) patients' needs in the near and long term.

**By Number of Patients:** The report also provides a glimpse of the number of dialysis patients. The population of patients receiving dialysis continues to grow rapidly as a result of an increase in the availability of dialysis, population aging, increased prevalence of hypertension and diabetes mellitus, and toxic environmental exposures. The dialysis patients have been analyzed based on type: Hemodialysis and Peritoneal Dialysis. Almost 89% of the patients received hemodialysis in 2021, while the remaining patients received peritoneal dialysis. The dialysis patients have also been segmented based on the region: Asia Pacific, Europe, Middle East & Africa (EMEA), North America, and the Rest of the World. In 2021, the Asia Pacific has the highest number of patients receiving dialysis, followed by the EMEA region.

**By Region:** The report provides insight into the dialysis market based on the regions namely North America, Europe, Asia Pacific, Latin America, and Middle East & Africa. North America held the major share of around two-fifths in the market, owing to the favorable reimbursement scenario, and increasing demand for dialysis in the treatment of chronic and acute renal diseases owing to the dearth of kidney donors. Within North America, the US is leading the market owing to an increasing number of kidney diseases. According to CDC, more than 1 in 7 US adults are estimated to have chronic kidney disease (CKD). The US dialysis market is further analyzed based on product and services (Services, Consumables, and Equipment), type (Hemodialysis and peritoneal dialysis), and end-user (In-Center Dialysis and Home Dialysis).

The European dialysis market is further studied based on products and services:

Services, Consumables, and Equipment. In 2021, services held the major share of the market whereas consumables held the highest CAGR of around 8% of the market.

The Asia Pacific's dialysis market has been bifurcated based on the following region: China, Japan, Australia, India, South Korea, and the Rest of the Asia Pacific. China held a major share of around 30% in Asia Pacific's dialysis market in 2021, owing to the rising diabetic population. According to the International Diabetes Federation, the number of diabetic people is expected to increase to 174.43 million by the year 2045. On the other hand, India is expected to be the fastest-growing region.

#### Market Dynamics:

**Growth Drivers:** The global dialysis market has been growing over the past few years, due to factors such as increasing diabetic population, increasing health spending, higher prevalence among aging population, increasing consumption of alcohol, increasing cases of ESRD, and many other factors. The aging population is one of the main drivers of growth in the global dialysis market. The aging population is more prone to chronic kidney disease because it is associated with serious diseases such as diabetes, cardiovascular disease, stroke, and arthritis, which would create opportunities for dialysis market growth.

**Challenges:** However, the market growth would be negatively impacted by various challenges such as high treatment costs, stringent regulations, etc.

**Trends:** The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as technological advancements, preference for dialysis treatment over transplant, rising demand for home dialysis, etc. A patient's quality of life increases when he or she can dialyze from home, especially in terms of improved independence and the capacity to work. Working allows dialysis patients to have more financial flexibility and psychological well-being, which is especially important for roughly half of new end-stage renal disease (ESRD) patients who are of working age. Therefore, the preference for home dialysis is expected to be increasing in the forthcoming years.

#### Impact Analysis of COVID-19 and Way Forward:

COVID-19 has had a positive impact on the growth of the dialysis market as patients are required to continue with their dialysis schedule amid of pandemic also. Moreover, the gradual shift towards home hemodialysis treatment before the pandemic and the

concerns over the spread of COVID-19 infection have considerably accelerated patient interest in home hemodialysis treatment. Also, technological advancement during the pandemic has boosted the market and is expected to continue to do so in the coming years. For instance, starting in 2021, customers have benefited from the virtual reality (VR) tool, staysafe MyTraining VR (launched by Fresenius Medical Care), to support patient training for continuous ambulatory peritoneal dialysis (CAPD).

#### Competitive Landscape:

The global dialysis market is consolidated. The key players in the global dialysis market are:

Fresenius Medical Care AG & Co. KGaA

Medtronic Plc

Becton, Dickinson and Company (C.R. Bard, Inc.)

Nipro Corporation

B. Braun (B. Braun Avitum AG)

Baxter International, Inc.

DaVita Inc.

Asahi Kasei Corporation

Nikkiso Co. Ltd.

Toray Industries, Inc.

AngioDynamics, Inc.

Quanta Dialysis Technologies Ltd.

Diaverum

Some of the strategies among key players in the market are product launches, mergers, acquisitions, and collaborations. For instance, in 2022, DaVita Inc. and Medtronic plc announced the intent to form a new, independent kidney care-focused medical device company (NewCo) to enhance the patient treatment experience and improve overall outcomes. Whereas, Baxter International Inc. announced the US Food and Drug Administration (FDA) 510(k) clearance of the company's ST Set used in continuous renal replacement therapy (CRRT). Moreover, In 2021, Fresenius Medical Care was the major shareholder in the global hemodialysis product market with a share of more than 40%. Whereas, Baxter International was the major shareholder in the global peritoneal dialysis product market with more than 74% share in the market.?

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