

Global Continuous Renal Replacement Therapy Market - 2025 -2033

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Abstracts

Continuous Renal Replacement Therapy Market is segmented By Product Type (Dialysate and Replacement Fluids, Disposables, Bloodline sets, Hemo-filters, Other disposables, Systems), By Application Type (Slow Continuous Ultra Filtration, Continuous Veno Venous Hemo-Filtration, Continuous Veno Venous Hemo-Dialysis, Continuous Veno Venous Hemo-Diafiltration), By Therapy Type (Renal, Non-renal, Combination of Both), By End-User (Hospitals, Ambulatory Surgery Clinics, Others), and By Region (North America, Latin America, Europe, Asia Pacific, Middle East, and Africa) – Share, Size, Outlook, and Opportunity Analysis, 2024-2031

Continuous Renal Replacement Therapy Market Size

Global continuous renal replacement therapy market reached US\$ million in 2023 and is expected to reach US\$ million by 2031, growing at a high CAGR during the forecast period 2024-2031.

Continuous Renal Replacement Therapy (CRRT) is a medical therapy used to manage acute kidney injury and severe kidney dysfunction in critically ill patients. Unlike traditional intermittent hemodialysis, CRRT is a continuous process that operates over an extended period, typically 24 hours a day, providing gradual removal of fluid, electrolytes and waste products from the blood.

CRRT is primarily utilized in intensive care units (ICUs) for patients who are hemodynamically unstable or unable to tolerate the rapid fluid and solute shifts associated with intermittent hemodialysis. It offers a gentler approach to renal replacement therapy, allowing for more gradual correction of fluid and electrolyte imbalances while minimizing hemodynamic instability.

The CRRT process involves the continuous circulation of the patient's blood through a specialized extracorporeal circuit that includes a hemofilter or dialyzer. Blood flows from the patient through vascular access, usually achieved through a central venous catheter into the CRRT machine where it passes through the filter or dialyzer. Here, excess fluid, electrolytes and waste products are removed from the blood, while essential solutes are maintained or supplemented as needed. The filtered or dialyzed blood is then returned to the patient, completing the circuit.

Continuous Renal Replacement Therapy Market Dynamics

Drivers

Rising advancements in continuous renal replacement therapy machines

The rising advancements in continuous renal replacement therapy machines are expected to drive the market over the forecast period. Advancements in CRRT machine technology lead to improved efficiency in fluid and solute removal by allowing for more effective treatment of patients with acute kidney injury and other renal conditions. Enhanced performance translates to better patient outcomes and reduced treatment times, thereby driving market demand.

For instance, on May 25, 2021, Baxter International Inc. launched PrisMax 2, the latest version of the company's next-generation platform. PrisMax 2 is designed to help simplify the delivery of continuous renal replacement therapy (CRRT) while providing hospitals the flexibility to meet the unique demands of the intensive care unit (ICU). PrisMax 2 will soon be available in more than 20 countries across the United States and Europe.

Additionally, on Dec. 8, 2020, Medtronic plc launched the Carpediem Cardio-Renal Pediatric Dialysis Emergency Machine followed by U.S. Food and Drug Administration's (FDA) marketing authorization, the first Carpediem systems in the United States were successfully installed and are in use at Cincinnati Children's Hospital Medical Center. The first-of-its-kind Carpediem system is indicated for use in acute kidney injury or fluid-overloaded patients requiring hemodialysis or hemofiltration therapy. It is intended to provide continuous renal replacement therapy (CRRT) to patients weighing between 2.5 and 10 kilograms.

Advancements in CRRT machine design have led to the development of more compact

and portable models. These portable CRRT machines offer greater flexibility in deployment, allowing for use in various clinical settings, including ICUs, ambulatory care units and even home settings. The increased accessibility and versatility of portable CRRT machines contribute to market expansion.

Due to the various advantages offered by CRRT machines, many manufacturing companies and institutes are focussing on developing these machines. For instance, on March 14, 2024, On World Kidney Day, Travancore Medicity unveiled Kollam's inaugural Continuous Renal Replacement Therapy (CRRT) machine, marking a significant milestone in the healthcare journey. In critically ill kidney patients, the CRRT machine helps to control blood pressure, maintain fluid balance in the body and improve the chances of survival.

Further, the increasing prevalence of renal injuries, rising aging population, increasing awareness about the CRRT and advancements in the development of novel products for the CRRT procedure are the factors expected to drive the market over the forecast period.

Restraints

Factors such as the high cost associated with CRRT machines, systems and consumables, risks and complications associated with the CPPT therapy and availability of alternative dialysis methods are the factors expected to hamper the market.

Continuous Renal Replacement Therapy Market Segment Analysis

The global continuous renal replacement therapy market is segmented based on product type, modality, end-user and region.

The CRRT machines and systems segment accounted for approximately 43.7% of the continuous renal replacement therapy market share

The CRRT machines and systems segment is expected to hold the largest market share over the forecast period. Each CRRT modality, such as Continuous Venovenous Hemofiltration, Continuous Venovenous Hemodialysis and Continuous Venovenous Hemodiafiltration, offers unique mechanisms for solute clearance and fluid removal. Clinicians can select the most appropriate modality based on the patient's clinical condition, fluid status, metabolic needs and hemodynamic stability, allowing for personalized treatment approaches.

For instance, on August 3, 2023, Quanta Dialysis Technologies received U.S. Food and Drug Administration (FDA) 510(k) clearance for an expanded indication of the Quanta Dialysis System, a compact and easy-to-use hemodialysis device for two modalities of continuous renal replacement therapy (CRRT): continuous venovenous hemodialysis (CVVHD) and slow continuous ultrafiltration (SCUF). Under the new 510(k), the Quanta Dialysis System is the only dialysis device FDA-cleared to provide intermittent hemodialysis (IHD), sustained low-efficiency dialysis (SLED) or bagless CRRT which creates dialysate on demand all in a single machine.

CRRT machines provide continuous renal support over extended periods, typically 24 hours a day, ensuring sustained removal of uremic toxins, electrolytes, and excess fluid. This continuous clearance offers more effective control of fluid overload, metabolic imbalances and uremia, leading to improved patient outcomes compared to intermittent therapies. CRRT machines and systems are designed for use in intensive care unit (ICU) settings, where critically ill patients require close monitoring and complex renal support. These systems are equipped with features such as integration with patient monitors, alarms for early detection of complications and compatibility with ICU equipment by facilitating seamless integration into the clinical workflow.

Continuous Renal Replacement Therapy Market Geographical Share

North America accounted for approximately 41.6% of the market share

North America region is expected to hold the largest market share over the forecast period owing to the strong presence of major players and well-established healthcare infrastructure. North America especially the United States is a well-known hub for its strong presence of major players such as pharmaceutical companies and medical device companies. This presence of major players in the region expands the continuous renal replacement therapy market by focusing on the development of various CRRT accessories and other CRRT products in the market.

For instance, on April 05, 2022, Baxter International Inc. cleared the U.S. Food and Drug Administration (FDA) 510(k) clearance of the company's ST Set used in continuous renal replacement therapy (CRRT). The ST Set is a pre-connected, disposable, extracorporeal (outside the body) circuit that provides blood purification through a semipermeable membrane to be used with the PrisMax or Prismaflex control units (monitors).

Additionally, the region especially the United States boasts a highly developed healthcare infrastructure, with well-equipped hospitals, advanced medical technologies and a skilled workforce. This infrastructure supports the widespread adoption and utilization of CRRT machines and systems in clinical practice.

For instance, on January 27, 2023, for critically ill patients who can no longer undergo traditional dialysis, Peconic Bay Medical Center now offers a solution. The hospital announced it now offers continuous renal replacement therapy (CRRT), a blood purification process much slower than typical dialysis, for patients experiencing a kidney injury. While a patient may undergo standard dialysis a few hours a day, CRRT runs 24 hours a day. The much slower method is also more comfortable and gentler on the body.

Continuous Renal Replacement Therapy Market Competitive Landscape

The major global players in the continuous renal replacement therapy market include Baxter International Inc., Asahi Kasei Corporation, B. Braun Medical Inc., Medtronic plc, Fresenius Medical Care AG, NxStage Medical, Inc., Infomed SA, Medica SPA, Medites Pharma spol. s.r.o. and Quanta Dialysis Technologies Inc. among others.

COVID-19 Impact Analysis on Continuous Renal Replacement Therapy Market

The COVID-19 pandemic significantly impacted the global continuous renal replacement therapy market. Acute kidney injury (AKI) is a common complication among patients with COVID-19. Continuous renal replacement therapy has been recommended to treat acute kidney injury in COVID-19 patients instead of conventional intermittent hemodialysis. Moreover, its use might have another beneficial role in stopping the progression of severe COVID-19 by removing pro-inflammatory cytokines during cytokine storm syndrome, which is postulated as the pathophysiology behind severe and critically severe cases of COVID-19.

Continuous Renal Replacement Therapy Market Segmentation Analysis

By Product Type

Consumables

Filters

Replacement Fluids

Others

CRRT Machines and Systems

Accessories

Catheters

Connectors

Monitors

Others

By Modality

Continuous Venovenous Hemofiltration (CVVH)

Continuous Venovenous Hemodialysis (CVVHD)

Continuous Venovenous Hemodiafiltration (CVVHDF)

By End-User

Hospitals

Specialty Clinics

Ambulatory Surgical Centers

Homecare Settings

Others

By Region

North America

U.S.

Canada

Mexico

Europe

Germany

U.K.

France

Spain

Italy

Rest of Europe

South America

Brazil

Argentina

Rest of South America

Asia-Pacific

China

India

Japan

Australia

Rest of Asia-Pacific

Middle East and Africa

Why Purchase the Report?

To visualize the global continuous renal replacement therapy market segmentation based on product type, modality, end-user and region as well as understand key commercial assets and players.

Identify commercial opportunities by analyzing trends and co-development

Excel data sheet with numerous data points of continuous renal replacement therapy market-level with all segments.

PDF report consists of a comprehensive analysis after exhaustive qualitative interviews and an in-depth study.

Product mapping available as excel consisting of key products of all the major players.

The global continuous renal replacement therapy market report would provide approximately 61 tables, 59 figures and 191 Pages.

Target Audience 2024

Manufacturers/ Buyers

Industry Investors/Investment Bankers

Research Professionals

Emerging Companies

Contents

1. Methodology and Scope

- 1.1. Research Methodology
- 1.2. Research Objective and Scope of the Report

2. DEFINITION AND OVERVIEW

3. EXECUTIVE SUMMARY

- 3.1. Snippet by Product Type
- 3.2. Snippet by Modality
- 3.3. Snippet by End-User
- 3.4. Snippet by Region

4. DYNAMICS

- 4.1. Impacting Factors
 - 4.1.1. Drivers
 - 4.1.1.1. Rising Advancements in Continuous Renal Replacement Therapy Machines
 - 4.1.2. Restraints
 - 4.1.2.1. High Cost Associated with CPPT
 - 4.1.3. Opportunity
 - 4.1.4. Impact Analysis

5. INDUSTRY ANALYSIS

- 5.1. Porter's Five Force Analysis
- 5.2. Supply Chain Analysis
- 5.3. Pricing Analysis
- 5.4. Regulatory Analysis
- 5.5. Unmet Needs
- 5.6. PESTEL Analysis
- 5.7. Patent Analysis
- 5.8. SWOT Analysis

6. COVID-19 ANALYSIS

- 6.1. Analysis of COVID-19
 - 6.1.1. Scenario Before COVID
 - 6.1.2. Scenario During COVID
 - 6.1.3. Scenario Post COVID
- 6.2. Pricing Dynamics Amid COVID-19
- 6.3. Demand-Supply Spectrum
- 6.4. Government Initiatives Related to the Market During the Pandemic
- 6.5. Manufacturers Strategic Initiatives
- 6.6. Conclusion

7. BY PRODUCT TYPE

- 7.1. Introduction
 - 7.1.1. Market Size Analysis and Y-o-Y Growth Analysis (%), By Product Type
 - 7.1.2. Market Attractiveness Index, By Product Type
- 7.2. Consumables*
 - 7.2.1. Introduction
 - 7.2.2. Market Size Analysis and Y-o-Y Growth Analysis (%)
 - 7.2.3. Filters
 - 7.2.4. Replacement Fluids
 - 7.2.5. Others
- 7.3. CRRT Machines and Systems
- 7.4. Accessories
 - 7.4.1. Catheters
 - 7.4.2. Connectors
 - 7.4.3. Monitors
 - 7.4.4. Others

8. BY MODALITY

- 8.1. Introduction
 - 8.1.1. Market Size Analysis and Y-o-Y Growth Analysis (%), By Modality
 - 8.1.2. Market Attractiveness Index, By Modality
- 8.2. Continuous Venovenous Hemofiltration (CVVH)*
 - 8.2.1. Introduction
 - 8.2.2. Market Size Analysis and Y-o-Y Growth Analysis (%)
- 8.3. Continuous Venovenous Hemodialysis (CVVHD)
- 8.4. Continuous Venovenous Hemodiafiltration (CVVHDF)

9. BY END-USER

9.1. Introduction

9.1.1. Market Size Analysis and Y-o-Y Growth Analysis (%), By End-User

9.1.2. Market Attractiveness Index, By End-User

9.2. Hospitals*

9.2.1. Introduction

9.2.2. Market Size Analysis and Y-o-Y Growth Analysis (%)

9.3. Specialty Clinics

9.4. Ambulatory Surgical Centers

9.5. Homecare Settings

9.6. Others

10. BY REGION

10.1. Introduction

10.1.1. Market Size Analysis and Y-o-Y Growth Analysis (%), By Region

10.1.2. Market Attractiveness Index, By Region

10.2. North America

10.2.1. Introduction

10.2.2. Key Region-Specific Dynamics

10.2.3. Market Size Analysis and Y-o-Y Growth Analysis (%), By Product Type

10.2.4. Market Size Analysis and Y-o-Y Growth Analysis (%), By Modality

10.2.5. Market Size Analysis and Y-o-Y Growth Analysis (%), By End-User

10.2.6. Market Size Analysis and Y-o-Y Growth Analysis (%), By Country

10.2.6.1. U.S.

10.2.6.2. Canada

10.2.6.3. Mexico

10.3. Europe

10.3.1. Introduction

10.3.2. Key Region-Specific Dynamics

10.3.3. Market Size Analysis and Y-o-Y Growth Analysis (%), By Product Type

10.3.4. Market Size Analysis and Y-o-Y Growth Analysis (%), By Modality

10.3.5. Market Size Analysis and Y-o-Y Growth Analysis (%), By End-User

10.3.6. Market Size Analysis and Y-o-Y Growth Analysis (%), By Country

10.3.6.1. Germany

10.3.6.2. UK

10.3.6.3. France

10.3.6.4. Italy

10.3.6.5. Spain

10.3.6.6. Rest of Europe

10.4. South America

10.4.1. Introduction

10.4.2. Key Region-Specific Dynamics

10.4.3. Market Size Analysis and Y-o-Y Growth Analysis (%), By Product Type

10.4.4. Market Size Analysis and Y-o-Y Growth Analysis (%), By Modality

10.4.5. Market Size Analysis and Y-o-Y Growth Analysis (%), By End-User

10.4.6. Market Size Analysis and Y-o-Y Growth Analysis (%), By Country

10.4.6.1. Brazil

10.4.6.2. Argentina

10.4.6.3. Rest of South America

10.5. Asia-Pacific

10.5.1. Introduction

10.5.2. Key Region-Specific Dynamics

10.5.3. Market Size Analysis and Y-o-Y Growth Analysis (%), By Product Type

10.5.4. Market Size Analysis and Y-o-Y Growth Analysis (%), By Modality

10.5.5. Market Size Analysis and Y-o-Y Growth Analysis (%), By End-User

10.5.6. Market Size Analysis and Y-o-Y Growth Analysis (%), By Country

10.5.6.1. China

10.5.6.2. India

10.5.6.3. Japan

10.5.6.4. Australia

10.5.6.5. Rest of Asia-Pacific

10.6. Middle East and Africa

10.6.1. Introduction

10.6.2. Key Region-Specific Dynamics

10.6.3. Market Size Analysis and Y-o-Y Growth Analysis (%), By Product Type

10.6.4. Market Size Analysis and Y-o-Y Growth Analysis (%), By Modality

10.6.5. Market Size Analysis and Y-o-Y Growth Analysis (%), By End-User

11. COMPETITIVE LANDSCAPE

11.1. Competitive Scenario

11.2. Market Positioning/Share Analysis

11.3. Mergers and Acquisitions Analysis

12. COMPANY PROFILES

- 12.1. Baxter International Inc.*
 - 12.1.1. Company Overview
 - 12.1.2. Product Portfolio and Description
 - 12.1.3. Financial Overview
 - 12.1.4. Key Developments
- 12.2. Asahi Kasei Corporation
- 12.3. B. Braun Medical Inc.
- 12.4. Medtronic plc
- 12.5. Fresenius Medical Care AG
- 12.6. NxStage Medical, Inc.
- 12.7. Infomed SA
- 12.8. Medica SPA
- 12.9. Medites Pharma spol. s.r.o.
- 12.10. Quanta Dialysis Technologies Inc. (*LIST NOT EXHAUSTIVE)

13. APPENDIX

- 13.1. About Us and Services
- 13.2. Contact Us

List Of Tables

LIST OF TABLES

Table 1 Global Continuous Renal Replacement Therapy Market Value, By Product Type, 2023, 2027 & 2031 (US\$ Million)

Table 2 Global Continuous Renal Replacement Therapy Market Value, By Modality, 2023, 2027 & 2031 (US\$ Million)

Table 3 Global Continuous Renal Replacement Therapy Market Value, By End-User, 2023, 2027 & 2031 (US\$ Million)

Table 4 Global Continuous Renal Replacement Therapy Market Value, By Region, 2023, 2027 & 2031 (US\$ Million)

Table 5 Global Continuous Renal Replacement Therapy Market Value, By Product Type, 2023, 2027 & 2031 (US\$ Million)

Table 6 Global Continuous Renal Replacement Therapy Market Value, By Product Type, 2022-2031 (US\$ Million)

Table 7 Global Continuous Renal Replacement Therapy Market Value, By Modality, 2023, 2027 & 2031 (US\$ Million)

Table 8 Global Continuous Renal Replacement Therapy Market Value, By Modality, 2022-2031 (US\$ Million)

Table 9 Global Continuous Renal Replacement Therapy Market Value, By End-User, 2023, 2027 & 2031 (US\$ Million)

Table 10 Global Continuous Renal Replacement Therapy Market Value, By End-User, 2022-2031 (US\$ Million)

Table 11 Global Continuous Renal Replacement Therapy Market Value, By Region, 2023, 2027 & 2031 (US\$ Million)

Table 12 Global Continuous Renal Replacement Therapy Market Value, By Region,

2022-2031 (US\$ Million)

Table 13 North America Continuous Renal Replacement Therapy Market Value, By Product Type, 2022-2031 (US\$ Million)

Table 14 North America Continuous Renal Replacement Therapy Market Value, By Modality, 2022-2031 (US\$ Million)

Table 15 North America Continuous Renal Replacement Therapy Market Value, By End-User, 2022-2031 (US\$ Million)

Table 16 North America Continuous Renal Replacement Therapy Market Value, By Country, 2022-2031 (US\$ Million)

Table 17 South America Continuous Renal Replacement Therapy Market Value, By Product Type, 2022-2031 (US\$ Million)

Table 18 South America Continuous Renal Replacement Therapy Market Value, By Modality, 2022-2031 (US\$ Million)

Table 19 South America Continuous Renal Replacement Therapy Market Value, By End-User, 2022-2031 (US\$ Million)

Table 20 South America Continuous Renal Replacement Therapy Market Value, By Country, 2022-2031 (US\$ Million)

Table 21 Europe Continuous Renal Replacement Therapy Market Value, By Product Type, 2022-2031 (US\$ Million)

Table 22 Europe Continuous Renal Replacement Therapy Market Value, By Modality, 2022-2031 (US\$ Million)

Table 23 Europe Continuous Renal Replacement Therapy Market Value, By End-User, 2022-2031 (US\$ Million)

Table 24 Europe Continuous Renal Replacement Therapy Market Value, By Country, 2022-2031 (US\$ Million)

Table 25 Asia-Pacific Continuous Renal Replacement Therapy Market Value, By

Product Type, 2022-2031 (US\$ Million)

Table 26 Asia-Pacific Continuous Renal Replacement Therapy Market Value, By Modality, 2022-2031 (US\$ Million)

Table 27 Asia-Pacific Continuous Renal Replacement Therapy Market Value, By End-User, 2022-2031 (US\$ Million)

Table 28 Asia-Pacific Continuous Renal Replacement Therapy Market Value, By Country, 2022-2031 (US\$ Million)

Table 29 Middle East & Africa Continuous Renal Replacement Therapy Market Value, By Product Type, 2022-2031 (US\$ Million)

Table 30 Middle East & Africa Continuous Renal Replacement Therapy Market Value, By Modality, 2022-2031 (US\$ Million)

Table 31 Middle East & Africa Continuous Renal Replacement Therapy Market Value, By End-User, 2022-2031 (US\$ Million)

Table 32 Baxter International Inc.: Overview

Table 33 Baxter International Inc.: Product Portfolio

Table 34 Baxter International Inc.: Key Developments

Table 35 Asahi Kasei Corporation: Overview

Table 36 Asahi Kasei Corporation: Product Portfolio

Table 37 Asahi Kasei Corporation: Key Developments

Table 38 B. Braun Medical Inc.: Overview

Table 39 B. Braun Medical Inc.: Product Portfolio

Table 40 B. Braun Medical Inc.: Key Developments

Table 41 Medtronic plc: Overview

Table 42 Medtronic plc: Product Portfolio

Table 43 Medtronic plc: Key Developments

Table 44 Fresenius Medical Care AG: Overview

Table 45 Fresenius Medical Care AG: Product Portfolio

Table 46 Fresenius Medical Care AG: Key Developments

Table 47 NxStage Medical, Inc.: Overview

Table 48 NxStage Medical, Inc.: Product Portfolio

Table 49 NxStage Medical, Inc.: Key Developments

Table 50 Infomed SA: Overview

Table 51 Infomed SA: Product Portfolio

Table 52 Infomed SA: Key Developments

Table 53 Medica SPA: Overview

Table 54 Medica SPA: Product Portfolio

Table 55 Medica SPA: Key Developments

Table 56 Medites Pharma spol. s.r.o.: Overview

Table 57 Medites Pharma spol. s.r.o.: Product Portfolio

Table 58 Medites Pharma spol. s.r.o.: Key Developments

Table 59 Quanta Dialysis Technologies Inc.: Overview

Table 60 Quanta Dialysis Technologies Inc.: Product Portfolio

Table 61 Quanta Dialysis Technologies Inc.: Key Developments

List Of Figures

LIST OF FIGURES

Figure 1 Global Continuous Renal Replacement Therapy Market Value, 2022-2031 (US\$ Million)

Figure 2 Global Continuous Renal Replacement Therapy Market Share, By Product Type, 2022 & 2031 (%)

Figure 3 Global Continuous Renal Replacement Therapy Market Share, By Modality, 2022 & 2031 (%)

Figure 4 Global Continuous Renal Replacement Therapy Market Share, By End-User, 2022 & 2031 (%)

Figure 5 Global Continuous Renal Replacement Therapy Market Share, By Region, 2022 & 2031 (%)

Figure 6 Global Continuous Renal Replacement Therapy Market Y-o-Y Growth, By Product Type, 2022-2031 (%)

Figure 7 Consumables Continuous Renal Replacement Therapy Market Value, 2022-2031 (US\$ Million)

Figure 8 CRRT Machines and Systems Continuous Renal Replacement Therapy Market Value, 2022-2031 (US\$ Million)

Figure 9 Accessories Continuous Renal Replacement Therapy Market Value, 2022-2031 (US\$ Million)

Figure 10 Global Continuous Renal Replacement Therapy Market Y-o-Y Growth, By Modality, 2022-2031 (%)

Figure 11 Continuous Venovenous Hemofiltration (CVVH) Modality in Global Continuous Renal Replacement Therapy Market Value, 2022-2031 (US\$ Million)

Figure 12 Continuous Venovenous Hemodialysis (CVVHD) Modality in Global

Continuous Renal Replacement Therapy Market Value, 2022-2031 (US\$ Million)

Figure 13 Continuous Venovenous Hemodiafiltration (CVVHDF) Modality in Global Continuous Renal Replacement Therapy Market Value, 2022-2031 (US\$ Million)

Figure 14 Global Continuous Renal Replacement Therapy Market Y-o-Y Growth, By End-User, 2022-2031 (%)

Figure 15 Hospitals End-User in Global Continuous Renal Replacement Therapy Market Value, 2022-2031 (US\$ Million)

Figure 16 Specialty Clinics End-User in Global Continuous Renal Replacement Therapy Market Value, 2022-2031 (US\$ Million)

Figure 17 Ambulatory Surgical Centers End-User in Global Continuous Renal Replacement Therapy Market Value, 2022-2031 (US\$ Million)

Figure 18 Homecare Settings End-User in Global Continuous Renal Replacement Therapy Market Value, 2022-2031 (US\$ Million)

Figure 19 Others End-User in Global Continuous Renal Replacement Therapy Market Value, 2022-2031 (US\$ Million)

Figure 20 Global Continuous Renal Replacement Therapy Market Y-o-Y Growth, By Region, 2022-2031 (%)

Figure 21 North America Continuous Renal Replacement Therapy Market Value, 2022-2031 (US\$ Million)

Figure 22 Asia-Pacific Continuous Renal Replacement Therapy Market Value, 2022-2031 (US\$ Million)

Figure 23 Europe Continuous Renal Replacement Therapy Market Value, 2022-2031 (US\$ Million)

Figure 24 South America Continuous Renal Replacement Therapy Market Value, 2022-2031 (US\$ Million)

Figure 25 Middle East and Africa Continuous Renal Replacement Therapy Market

Value, 2022-2031 (US\$ Million)

Figure 26 North America Continuous Renal Replacement Therapy Market Value, 2022-2031 (US\$ Million)

Figure 27 North America Continuous Renal Replacement Therapy Market Share, By Product Type, 2022 & 2031 (%)

Figure 28 North America Continuous Renal Replacement Therapy Market Share, By Modality, 2022 & 2031 (%)

Figure 29 North America Continuous Renal Replacement Therapy Market Share, By End-User, 2022 & 2031 (%)

Figure 30 North America Continuous Renal Replacement Therapy Market Share, By Country, 2022 & 2031 (%)

Figure 31 South America Continuous Renal Replacement Therapy Market Value, 2022-2031 (US\$ Million)

Figure 32 South America Continuous Renal Replacement Therapy Market Share, By Product Type, 2022 & 2031 (%)

Figure 33 South America Continuous Renal Replacement Therapy Market Share, By Modality, 2022 & 2031 (%)

Figure 34 South America Continuous Renal Replacement Therapy Market Share, By End-User, 2022 & 2031 (%)

Figure 35 South America Continuous Renal Replacement Therapy Market Share, By Country, 2022 & 2031 (%)

Figure 36 Europe Continuous Renal Replacement Therapy Market Value, 2022-2031 (US\$ Million)

Figure 37 Europe Continuous Renal Replacement Therapy Market Share, By Product Type, 2022 & 2031 (%)

Figure 38 Europe Continuous Renal Replacement Therapy Market Share, By Modality,

2022 & 2031 (%)

Figure 39 Europe Continuous Renal Replacement Therapy Market Share, By End-User, 2022 & 2031 (%)

Figure 40 Europe Continuous Renal Replacement Therapy Market Share, By Country, 2022 & 2031 (%)

Figure 41 Asia-Pacific Continuous Renal Replacement Therapy Market Value, 2022-2031 (US\$ Million)

Figure 42 Asia-Pacific Continuous Renal Replacement Therapy Market Share, By Product Type, 2022 & 2031 (%)

Figure 43 Asia-Pacific Continuous Renal Replacement Therapy Market Share, By Modality, 2022 & 2031 (%)

Figure 44 Asia-Pacific Continuous Renal Replacement Therapy Market Share, By End-User, 2022 & 2031 (%)

Figure 45 Asia-Pacific Continuous Renal Replacement Therapy Market Share, By Country, 2022 & 2031 (%)

Figure 46 Middle East & Africa Continuous Renal Replacement Therapy Market Value, 2022-2031 (US\$ Million)

Figure 47 Middle East & Africa Continuous Renal Replacement Therapy Market Share, By Product Type, 2022 & 2031 (%)

Figure 48 Middle East & Africa Continuous Renal Replacement Therapy Market Share, By Modality, 2022 & 2031 (%)

Figure 49 Middle East & Africa Continuous Renal Replacement Therapy Market Share, By End-User, 2022 & 2031 (%)

Figure 50 Baxter International Inc.: Financials

Figure 51 Asahi Kasei Corporation: Financials

Figure 52 B. Braun Medical Inc.: Financials

Figure 53 Medtronic plc: Financials

Figure 54 Fresenius Medical Care AG: Financials

Figure 55 NxStage Medical, Inc.: Financials

Figure 56 Infomed SA: Financials

Figure 57 Medica SPA: Financials

Figure 58 Medites Pharma spol. s.r.o.: Financials

Figure 59 Quanta Dialysis Technologies Inc.: Financials

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