

# Global Continuous Renal Replacement Therapy Market - 2024 -2031

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## Abstracts

### 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

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