

Continuous Renal Replacement Therapy Machines (CRRT)- Market Insights, Competitive Landscape and Market Forecast-2026

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Abstracts

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CONTINUOUS RENAL REPLACEMENT THERAPY MACHINES MARKET BY PRODUCT TYPE (MACHINES AND CONSUMABLES), BY MODALITY (SLOW CONTINUOUS ULTRAFILTRATION (SCUF), CONTINUOUS VENOVENOUS HEMOFILTRATION (CVVH), CONTINUOUS VENOVENOUS HEMODIALYSIS (CVVHD), AND CONTINUOUS VENOVENOUS HEMODIAFILTRATION (CVVHDF)), BY PATIENT (ADULT AND PEDIATRIC), BY END USER (HOSPITALS, DIALYSIS CENTRES, AND OTHERS), BY GEOGRAPHY IS PROJECTED TO EXPAND AT A CONSTANT CAGR FORECAST TILL 2026 ON ACCOUNT OF SIGNIFICANT TECHNOLOGICAL ADVANCEMENT AND RISING PREVALENCE OF ACUTE RENAL FAILURE

Global Continuous Renal Replacement Therapy (CRRT) Machines Market was valued at USD 1.17 billion in 2020, growing at a CAGR of 7.38% during the forecast period from 2021 to 2026, to reach USD 1.78 billion by 2026. The demand for CRRT machines is predominantly attributed to the rise in prevalence of Acute Renal Failure or Acute Kidney Injury (AKI) across the globe, the growing burden of ICU patients with AKI along with an increase in the incidence of sepsis, significant technological advancement in the product line. The clinical advantage of CRRT over intermittent blood purification systems is also a driving factor for the CRRT machines market.

CRRT MACHINES MARKET DYNAMICS:

Acute kidney injury (AKI) is one of the most common serious complications for all

hospital admissions, with its incidence increasing among hospitalized patients, particularly those in the intensive care unit. Moreover, it is recognized that underlying chronic kidney disease is a risk factor for AKI. Also, according to a study published in LANCET 2020, in 2017, 697.5 million cases of all-stage CKD were recorded and around 1.2 million died from the indication. Therefore, the rising prevalence of AKI and other chronic kidney disorders that leads to ultimate renal failure increases the demand for CRRT machines as these machines provide renal support by slowly removing fluid and uremic toxins and returning clean blood to the body over 24 hours duration in critically ill patients suffering from AKI and are hemodynamically unstable. Thus, contributing to the growth of the Global CRRT market.

Furthermore, various technological advancement which mainly comprises high permeability hemofiltration and high volume permeability since the advent of continuous renal replacement therapy is also expected to boost the global CRRT market.

At present, the manufacturers are developing precise devices that are safe and give a reliable performance during CRRT procedures. Also, for easy performance, these devices are equipped with a user-friendly interface. For instance, recently, in 2021, Baxter announced the launch of its latest version of the next-generation CRRT platform, PrisMax 2. The PrisMax 2 system features new solutions within the company's TrueVue digital health portfolio and is designed to help simplify the delivery of continuous renal replacement therapy (CRRT) and other organ support therapies while providing hospitals the flexibility to meet the unique demands of the intensive care unit (ICU). Thus, such factors are contributing to the upsurge of the global CRRT machines market.

In addition, The COVID-19 pandemic had a significant impact on the CRRT market. This is due to the potential increase in kidney damage in patients with severe COVID infections. For instance, as per an article published in the International Society of Nephrology 2020, countries such as China have reported as high as 29% AKI rates. To curb the rising incidence of AKIs due to COVID infection early CRRT is a necessary step, thus the demand for renal replacement has increased across the globe as every country is dealing with the deadly virus. Recent approval from the FDA for emergency use of medical devices during the crisis for blood purification is also projected to propel the market. For instance, Baxter obtained U.S. FDA Emergency Use Authorization for Oxiris Blood Purification Filter for COVID-19 Treatment in 2020. At present, it is only the filter set available in the U.S. to reduce pro-inflammatory cytokine levels in the blood, including use in continuous renal replacement therapy (CRRT), for confirmed COVID-19 cases admitted to the ICU with confirmed or imminent respiratory failure who require

blood purification.

Certain factors such as the high procedural cost of CRRT are likely to pose a minor hurdle for the growth of the CRRT market.

CRRT MACHINES MARKET SEGMENT ANALYSIS:

CRRT Market by Product Type (Machines and Consumables), by Modality (Slow Continuous Ultrafiltration (SCUF), Continuous Venovenous Hemofiltration (CVVH), Continuous Venovenous Hemodialysis (CVVHD), and Continuous Venovenous Hemodiafiltration (CVVHDF)), by Patient (Adult and Pediatric), by End User (Hospitals, Dialysis Centres, and Others), and by Geography (North America, Europe, Asia-Pacific, and Rest of the World).

In the CRRT market modality segment, the Continuous Venovenous Hemofiltration (CVVH) holds the highest market. This is owing to the rising incidence of fluid overloads that are frequently found in patients with acute kidney injuries and are in ICU. However, it is also expected that Continuous Venovenous Hemodiafiltration (CVVHDF) will observe a lucrative growth during the forecasted period. This is because the CVVHDF treatment modality results in complete removal of solutes and fluids from the blood as it combines both the principle of convection and diffusion i.e., hemofiltration and hemodialysis by making use of a highly efficient hemodiafilter for the removal of solute and fluid. Thereby propelling the segmental growth of the CRRT market.

Moreover, most of the CRRT machines are compatible with more than two or three modalities which can further fuel the market. In 2019, Baxter launched PrisMax system the company's platform for continuous renal replacement therapy (CRRT), therapeutic plasma exchange (TPE), and organ support therapies (OST). The system delivers all therapy modalities of CRRT and therapeutic plasma exchange (TPE) without additional equipment. Hence, these factors are responsible for growth of the CVVH modality systems along with CVVHDF modalities during the forecasted period.

NORTH AMERICA IS EXPECTED TO DOMINATE THE OVERALL CRRT MACHINES MARKET:

Among all the regions, North America is expected to dominate the overall CRRT machines market during the forecast period. This domination is due to the growing demand for advanced technologies in CRRT machines, the increasing cases of CKD and associated AKIs in the region are driving the regional growth.

Further, the United States represents the largest market worldwide supported by developed healthcare infrastructure and strong R&D expenditure by the key players. Rising product launch and commercialization agreements among the key manufacturers are also anticipated to boost the CRRT market. For instance, the recent launch of the first and only Pediatric and Neonatal Acute Dialysis Machine (Carpediem™ systems) in December 2020 which is intended to provide continuous renal replacement therapy (CRRT) to patients weighing between 2.5 and 10 kilograms in the United States is likely to grow the market in the region.

In addition, the integration of telehealth platforms to improve outcomes and the care experience for CKD patients deciding to treat at home is also expected to fuel the market in the region. For instance, in 2019, DaVita incorporated its connective technologies DaVita Care Connect into its home dialysis program to meet the latest COVID-19 regulations implemented by the government to prevent the transmission of infection.

Europe and Asia-Pacific region have the future potential growth for the Global CRRT machines. This is due to the increasing incidence and prevalence of AKI and rising government initiatives to increase awareness about the advancements in renal therapy which is likely to surge the market. According to International Society of Nephrology 2021, every year, there are around 13.3 million cases of AKI and the increased burden is on emerging countries where the annual incidence is estimated to be 11.3 million. Further, out of 1.7 million global deaths per year caused by AKI, around 1.4 million occur in low- and middle-income countries. Therefore, this situation is giving rise to a critical need for CRRT machines thereby augmenting CRRT market in these region. Moreover, rapid urbanization, increase in disposable income in the emerging countries such as China, India, and others, and the presence of local manufacturers in the region is also projected to drive the global CRRT market.

CRRT MACHINES MARKET KEY PLAYERS:

Some of the key market players operating in the CRRT machines market include Baxter International Inc., Fresenius Medical Care AG & Co. KGaA, NIKKISO CO., LTD., B. Braun Melsungen AG, Asahi Kasei Corporation, Informed SA, Medtronic, and others.

RECENT DEVELOPMENTAL ACTIVITIES IN CRRT MACHINES MARKET:

? In August 2020, Baxter obtained US FDA Emergency Use Authorization for Regiocit

Replacement Solution used In CRRT.

? In April 2020, Fresenius Medical Care received US FDA Emergency Use Authorization for multiFiltrate PRO System and multiBic/multiPlus Solutions to provide CRRT to treat patients in an acute care environment during the COVID-19 pandemic.

KEY TAKES AWAY FROM THE CRRT MACHINES MARKET REPORT STUDY

? Market size analysis for current market size (2020), and market forecast for 5 years (2021-2026)

? The effect of the COVID-19 pandemic on this market is significant. To capture and analyze suitable indicators, our experts are closely watching the CRRT market.

? Top key product/services/technology developments, merger, acquisition, partnership, joint venture happened for last 3 years

? Key companies dominating the Global CRRT machines Market.

? Various opportunities available for the other competitor in the CRRT machines Market space.

? What are the top performing segments in 2020? How these segments will perform in 2026.

? Which is the top-performing regions and countries in the current market scenario?

? Which are the regions and countries where companies should have concentrated on opportunities for CRRT Machines market growth in the coming future?

TARGET AUDIENCE WHO CAN BE BENEFITED FROM CRRT MACHINES MARKET REPORT STUDY

? CRRT machines providers

? Research organizations and consulting companies

? CRRT machines-related organization, association, forum, and other alliances

? Government and corporate offices

? Start-up companies, venture capitalists, and private equity firms

? Distributors and Traders in CRRT Machines

? Various End-users who want to know more about the CRRT machines Market and latest technological developments in the CRRT machines market.

FREQUENTLY ASKED QUESTIONS FOR CRRT MACHINES MARKET:

What is CRRT Machine?

CRRT machines are used in blood purification therapy in patients suffering with acute renal failure or acute kidney injuries. The machine pumps and controls the rate of blood flow and includes software to safely monitor therapy delivery. These machines are available in four different modes: Slow Continuous Ultrafiltration (SCUF), Continuous Venovenous Hemofiltration (CVVH), Continuous Venovenous Hemodialysis (CVVHD), and Continuous Venovenous Hemodiafiltration (CVVHDF)

What is the market for Global CRRT Machines?

Global Continuous Renal Replacement Therapy (CRRT) Machines Market was valued at USD 1.17 billion in 2020, growing at a CAGR of 7.38% during the forecast period from 2021 to 2026, to reach USD 1.78 billion by 2026.

What are the drivers for the Global CRRT Machines Market?

The major factors fuelling the demand for CRRT machines are the rising prevalence of acute renal failure, the growing burden of acute kidney injuries among ICU patients, new product approvals, and the shifting focus of key players for developing advanced products.

What are the key players operating in the global CRRT Machines Market?

Some of the key market players operating in the CRRT machines market include Baxter International Inc., Fresenius Medical Care AG & Co. KGaA, NIKKISO CO., LTD., B. Braun Melsungen AG, Asahi Kasei Corporation, Informed SA, Medtronic, and others.

What regions has the highest share in the CRRT Machines market?

North America is expected to dominate the overall CRRT Machines market during the forecast period, 2021 to 2026 due to the advanced healthcare system, increasing prevalence of chronic kidney disorders in the region, and rising product developmental activities among the key market players.

Contents

1. CRRT MACHINES MARKET REPORT INTRODUCTION

2. CRRT MACHINES MARKET EXECUTIVE SUMMARY

- 2.1 Scope of the Study
- 2.2 Market at Glance
- 2.3 Competitive Assessment
- 2.4 Financial Benchmarking

3. REGULATORY AND PATENT ANALYSIS

- 3.1 The United States
- 3.2 Europe
 - 3.2.1 Germany
 - 3.2.2 France
 - 3.2.3 Italy
 - 3.2.4 Spain
 - 3.2.5 U.K.
- 3.3 Japan

4 CRRT MACHINES MARKET KEY FACTORS ANALYSIS

- 4.1 CRRT Machines Market Drivers
 - 4.1.1 Increasing incidence of Acute Kidney Injury (AKI)
 - 4.1.2 Increasing Clinical Advantage of CRRT Over Intermittent Blood Purification
 - 4.1.3 Technological Advancement and New Product Launches
 - 4.1.4 Growing Number of ICU Patients with AKI
- 4.2 CRRT Machines Market Restraints and Challenges
 - 4.2.1 Stringent Regulatory Guidelines
 - 4.2.2 High Procedural Cost of CRRT
- 4.3 CRRT Machines Market Opportunities
 - 4.3.1 Development of CRRT Systems for Pediatric Patients
 - 4.3.2 Growth opportunities in emerging countries

5 CRRT MACHINES PORTER'S FIVE FORCES ANALYSIS

- 5.1 Bargaining Power of Suppliers

5.2 Bargaining Power of Consumers

5.3 Threat of New Entrants

5.4 Threat of Substitutes

5.5 Competitive Rivalry

6 COVID-19 IMPACT ANALYSIS ON CRRT MACHINES MARKET

7. CRRT MACHINES MARKET LAYOUT

7.1 By Product Type

7.1.1 Machines

7.1.2 Consumables

7.2 By Modality

7.2.1 Slow Continuous Ultrafiltration (SCUF)

7.2.2 Continuous Venovenous Hemofiltration (CVVH)

7.2.3 Continuous Venovenous Hemodialysis (CVVHD)

7.2.4 Continuous Venovenous Hemodiafiltration (CVVHDF)

7.3 By Patient

7.3.1 Adults

7.3.2 Pediatrics

7.4 By End User

7.4.1 Hospitals

7.4.2 Dialysis Centers

7.4.3 Others

7.5 By Geography

7.5.1 North America

7.5.1.1 North America CRRT Machines Market, by Product Type

7.5.1.2 North America CRRT Machines Market, by Modality

7.5.1.3 North America CRRT Machines Market, by Patient

7.5.1.4 North America CRRT Machines Market, by End User

7.5.1.5 North America CRRT Machines Market, by Country

7.5.1.5.1 United States

7.5.1.5.2 Canada

7.5.1.5.3 Mexico

7.5.2 Europe

7.5.2.1 Europe CRRT Machines Market, by Product Type

7.5.2.2 Europe CRRT Machines Market, by Modality

7.5.2.3 Europe CRRT Machines Market, by Patient

7.5.2.4 Europe CRRT Machines Market, by End User

7.5.2.5 Europe CRRT Machines Market, by Country

7.5.2.5.1 France

7.5.2.5.2 Germany

7.5.2.5.3 United Kingdom

7.5.2.5.4 Italy

7.5.2.5.5 Spain

7.5.2.5.6 Russia

7.5.2.5.7 Rest of Europe

7.5.3 Asia-Pacific

7.5.3.1 Asia-Pacific CRRT Machines Market, by Product Type

7.5.3.2 Asia-Pacific CRRT Machines Market, by Modality

7.5.3.3 Asia-Pacific CRRT Machines Market, by Patient

7.5.3.4 Asia-Pacific CRRT Machines Market, by End User

7.5.3.5 Asia-Pacific CRRT Machines Market, by Country

7.5.3.5.1 China

7.5.3.5.2 Japan

7.5.3.5.3 India

7.5.3.5.4 Australia

7.5.3.5.5 South Korea

7.5.3.5.6 Rest of Asia Pacific

7.5.4 Rest of the World (RoW)

7.5.4.1 RoW CRRT Machines Market, by Product

7.5.4.2 RoW CRRT Machines Market, by Modality

7.5.4.3 RoW CRRT Machines Market, by Patient

7.5.4.4 RoW CRRT Machines Market, by End User

7.5.4.5 RoW CRRT Machines Market, by Region

7.5.4.5.1 Middle East

7.5.4.5.2 Africa

7.5.4.5.3 South America

8. CRRT MACHINES GLOBAL COMPANY SHARE ANALYSIS – KEY 3-5 COMPANIES

9. CRRT MACHINES COMPANY AND PRODUCT PROFILES

9.1 Baxter International Inc.

9.1.1. Company Overview

9.1.2. Company Snapshot

9.1.3. Financial Overview

- 9.1.4 Product Listing
- 9.1.5. Entropy
- 9.2 Fresenius Medical Care AG & Co. KGaA
 - 9.2.1. Company Overview
 - 9.2.2. Company Snapshot
 - 9.2.3. Financial Overview
 - 9.2.4 Product Listing
 - 9.2.5. Entropy
- 9.3 NIKKISO CO., LTD.
 - 9.3.1. Company Overview
 - 9.3.2. Company Snapshot
 - 9.3.3. Financial Overview
 - 9.3.4 Product Listing
 - 9.3.5. Entropy
- 9.4 B. Braun Melsungen AG
 - 9.4.1. Company Overview
 - 9.4.2. Company Snapshot
 - 9.4.3. Financial Overview
 - 9.4.4 Product Listing
 - 9.4.5. Entropy
- 9.5 Asahi Kasei Corporation
 - 9.5.1. Company Overview
 - 9.5.2. Company Snapshot
 - 9.5.3. Financial Overview
 - 9.5.4 Product Listing
 - 9.5.5. Entropy
- 9.6 Infomed SA
 - 9.6.1. Company Overview
 - 9.6.2. Company Snapshot
 - 9.6.3. Financial Overview
 - 9.6.4 Product Listing
 - 9.6.5. Entropy
- 9.7 Medtronic
 - 9.7.1. Company Overview
 - 9.7.2. Company Snapshot
 - 9.7.3. Financial Overview
 - 9.7.4 Product Listing
 - 9.7.5. Entropy
- 9.8 NxStage Medical, Inc.

- 9.8.1. Company Overview
- 9.8.2. Company Snapshot
- 9.8.3. Financial Overview
- 9.8.4 Product Listing
- 9.8.5. Entropy
- 9.9 Medica S.p.A.
 - 9.9.1. Company Overview
 - 9.9.2. Company Snapshot
 - 9.9.3. Financial Overview
 - 9.9.4 Product Listing
 - 9.9.5. Entropy
- 9.10 SWS Hemodialysis Care Co., Ltd.
 - 9.10.1. Company Overview
 - 9.10.2. Company Snapshot
 - 9.10.3. Financial Overview
 - 9.10.4 Product Listing
 - 9.10.5. Entropy
- 9.11 Dialco Medical Inc.
 - 9.11.1. Company Overview
 - 9.11.2. Company Snapshot
 - 9.11.3. Financial Overview
 - 9.11.4 Product Listing
 - 9.11.5. Entropy
- 9.12 Anjue Medical Equipment Co. Ltd.
 - 9.12.1. Company Overview
 - 9.12.2. Company Snapshot
 - 9.12.3. Financial Overview
 - 9.12.4 Product Listing
 - 9.12.5. Entropy
- 9.13 Medica S.p.A.
 - 9.13.1. Company Overview
 - 9.13.2. Company Snapshot
 - 9.13.3. Financial Overview
 - 9.13.4 Product Listing
 - 9.13.5. Entropy
- 9.14 Jiangxi Sanxin Medtec Co. Ltd.
 - 9.14.1. Company Overview
 - 9.14.2. Company Snapshot
 - 9.14.3. Financial Overview

9.14.4 Product Listing

9.14.5. Entropy

10. PROJECT APPROACH

10.1 Secondary Sources

10.2 Primary Sources

10.3 Data Triangulation

10.4 Key Expert Opinions

11. KOL VIEWS

12. DELVEINSIGHT CAPABILITIES

13. DISCLAIMER

14. ABOUT DELVEINSIGHT

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