

Dialysis Devices - Market Insights, Competitive Landscape and Market Forecast-2026

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Abstracts

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Dialysis Devices Market By Product Type (Hemodialysis Machines, Peritoneal Dialysis Machines, Continuous Renal Replacement Therapy Machines And Consumables), By Mobility (Stationary And Portable), By End User (Hospitals, Dialysis Centers, And Homecare Settings), and by geography is expected to grow at a steady CAGR (forecast period- 2021-2026) owing growing prevalence of kidney failure primarily due to increasing prevalence of diabetes and hypertension

Global dialysis devices market was valued at USD 71.00 billion in 2020, growing at a CAGR of 4.84% during the forecast period from 2021 to 2026 to reach USD 94.30 billion by 2026. The demand for dialysis devices is witnessing a surge majorly due to the rising prevalence of kidney failure due to various reasons such as rising geriatric population wherein age acts as a major risk factor for loss of kidney function, rising prevalence of diabetes in which hyperglycemia is linked with blood vessel damage in kidneys. Furthermore, hypertension is another key factor which is extensively linked with kidney failure. Additionally, the technological advancements such as the development of continuous renal replacement therapy (CRRT) have also been a major influential factor in boosting the growth of the dialysis devices market during the forecast period from 2021-2026.

Dialysis Devices Market Dynamics:

The dialysis devices market is gaining momentum due to a variety of reasons with one of the key reasons being the rising prevalence of chronic kidney disorders. This can be attributed to the rising prevalence of diabetes across the globe. According to the data

provided by the International Diabetes Federation in their tenth edition of the IDF Diabetes Atlas, in 2021, 537 million people in the age group of 20-79 were diagnosed with diabetes globally. The same source further predicted that by 2030, the prevalence of diabetes is expected to rise to 643 million. Hyperglycemia is linked with the development of diabetic kidney disease which in itself plays as a key risk factor for chronic kidney disease and end stage renal disease. It has been established in numerous research high blood sugar levels affect the kidneys in multifactorial ways. For instance, high blood sugar result in the narrowing of blood vessels supplying the kidney which significantly impacts the filtration capacities of the kidneys. High glycemic levels are associated with chronic hemodynamic and metabolic changes which in turn, are associated with changes in the signaling pathways, cytokines, transcription factors, and other factors. Therefore, the rising prevalence of diabetes is linked with the increasing number of cases associated with kidney diseases such as diabetic kidney disease and end stage renal disease thereby driving the demand for dialysis procedures and ultimately positively influencing the dialysis devices market during the forecast period (2021-2026).

Another important aspect driving the demand for dialysis devices market is the ascent in the geriatric population base. As per the figures cited by the World Health Organization in their Decade of Healthy Ageing (2020–2030) Report, it is estimated that people over the age of 60 years and older will account for 34% more share in the total population, from one billion in 2019 to accounting for 1.4 billion by 2030. The report further states that by 2050, the world's elderly population is expected to reach 2.1 billion. Aging is associated with progressive decline of kidney function as senescence-related structural, molecular, and functional changes affect the reparative capacity of kidney thereby predisposing older people to various renal diseases. Therefore, the growing elderly population is predicted to result in increase in incidence of renal diseases resulting in growing demand for dialysis thereby bolstering the growth of the dialysis devices market in coming years.

However, procedure-related complications and the high cost of dialysis services for patients in growing economies may be growth-restraining factors for the dialysis devices market.

Besides the above-mentioned factors, the dialysis devices market witnessed a slight dip in revenue generation due to the COVID-19 pandemic. Even though due to the urgent nature of dialysis services in terms of supporting life, there was a slight dip in conductance of such procedures however the trends across the globe varied massively. For this specific market, restrictions pertaining to the COVID-19 pandemic did not affect

the demand for dialysis as such due to the life supporting nature of the therapy. However, the post-pandemic scenario provides an even opportune moment for revenue generation for the dialysis devices market due to the resumption of activities in full capacity thereby improving the market outlook for the dialysis devices market during the forecast period.

Dialysis Devices Market Segment Analysis:

Dialysis Devices Market by Product Type (Hemodialysis Machines, Peritoneal Dialysis Machines, Continuous Renal Replacement Therapy Machines and Consumables), by Mobility (Stationary and Portable), by End User (Hospitals, Dialysis Centers, and Homecare Settings), and by Geography (North America, Europe, Asia-Pacific, and Rest of the World).

In the product segment of the dialysis devices market, the continuous renal replacement therapy (CRRT) category is expected to register the fastest CAGR in the dialysis devices market during the forecast period. This can be attributed to the advantages offered by this type of dialysis. One of the key advantages associated with CRRT is that it is a slower type of dialysis which remarkably decreases the load on the heart during dialysis compared to other dialysis procedures. It is conducted over the period of 24 hours instead of doing it over four hours, which ultimately decreases the stress on the heart.

Additionally, compared to intermittent hemodialysis, CRRT is preferred in patients suffering from sepsis-induced acute kidney injury in removing various components such as excess metabolic waste and water, also helps in lowering pro-inflammatory cytokine levels, helps in maintaining homeostasis, lowers the negative impact on the cardiovascular system, thereby significantly improving the prognosis of the patient. Furthermore, as it has been established in various recent studies, CRRT is being preferred in COVID-19 patients with acute kidney injury as it was observed that besides helping in overcoming limitations of kidney function, it helped in ceasing the progression of severe COVID-19 infection as the CRRT therapy could remove the pro-inflammatory cytokines during the cytokine storm syndrome reported in severe COVID-19 infection.

Therefore, the demand for dialysis devices, specifically CRRT is set to register remarkable growth during the forecast period, ultimately helping the dialysis market to generate commendable revenue.

North America is expected to dominate the overall Dialysis Devices Market:

Among all the regions, North America is estimated to account for the largest share in the dialysis devices market. This domination is due to the rising prevalence of kidney disorders, rising population of patients suffering from lifestyle disorders such as obesity and hypertension. Moreover, extensive efforts in product developmental activities and growing popularity of home-based dialysis devices are further expected to drive the product demand in the North American region. In addition to the above-stated factors, the new product launches and approvals and the extensive coverage of procedural cost specifically in the United States and Canada are expected to further boost the market for dialysis devices in North America.

One of the key driving factors of the United States dialysis devices market is the interplay of various factors in the country. For instance, as per the data cited by the Centers for Disease Control and Prevention (2021), about 15% of the adults in the United States (accounting for approximately 37 million people) are estimated to have chronic kidney disease. According to further estimates presented by the source, women are slightly more affected by CKD as compared to men. CKD, over time, progresses to kidney failure thereby necessitating the need for dialysis. Therefore, the growing burden of kidney disorders indicated by the increase in patient population corresponds to the presence of a potential patient population that may require dialysis as a life supporting therapy, thus positively influencing the product demand in the nation.

Additionally, another key factor that is thought to contribute to the increasing prevalence of kidney disorders is the surge in obesity in the country population. For instance, as per the data provided by the CDC (2021), in 2017-2018, the obesity prevalence in the country was 42.4%. Obesity has been established as a formidable risk factor for the development of kidney disease. It has been studied that in patients affected by obesity, a compensatory mechanism of hyper filtration is said to take place to meet the increased metabolic demands due to gain in body weight. This can massively increase the intraglomerular pressure which may damage the kidney structure and escalate the risk of developing CKD in the long term.

Furthermore, the product development activities and product approvals by the concerned regulatory authority in North American countries are further expected to drive the product demand in the region. For instance, in March 2021, Baxter Healthcare Corporation received the regulatory approval from the US Food and Drug Administration for their AK 98 Dialysis Machine, classified as a class II medical device.

Moreover, the conducive health coverage scenario specifically in the United States and

Canada also provides conditions for the regional market to grow as the coverage of procedural cost of dialysis by public and private insurers help in more people availing such services thereby contributing in the increase in access to dialysis services in the region.

Thus, the interplay of all the previously factors are likely to contribute to the market growth of dialysis devices in the United States as well as North America region as a whole during the forecast period.

Dialysis Devices Market Key Players:

Some of the key market players operating in the dialysis devices market includes Fresenius Medical Care, B. Braun Melsungen AG, Nipro Corporation, Dialife SA, Baxter, Cantel Medical Corporation, NIKKISO CO., LTD, Asahi Kasei Medical, NxStage Medical, Inc. Infomed SA, Medtronic, Anjue Medical Equipment Co., Ltd., Dialco Medical Inc., SWS Hemodialysis Care Co.,Ltd, TORAY MEDICAL CO.,LTD., Trivitron Healthcare, BLT Biolight Meditech, QUANTA Dialysis Technologies, and others.

Recent Developmental Activities in Dialysis Devices Market:

In January 2021, the US Food and Drug Administration granted the regulatory approval to Quanta Dialysis Technologies Ltd for their product- hemodialysis system SC+. The device is a portable system which is capable of offering dialysis care comparable to full-sized dialysis equipment in a range of care settings.

In August 2020, the US FDA granted the emergency-use authorization (EUA) for REGIOCIT which is intended to be used as a replacement solution specifically in adult patients who are being treated with CRRT and for whom regional citrate anticoagulation is considered appropriate.

In October 2018, Baxter received the CE mark approval for the next-generation continuous renal replacement therapy using PrisMax system.

Key Takeaways from the Dialysis Devices Market Report Study

Market size analysis for current dialysis devices 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 dialysis devices market.

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

Key companies dominating the global dialysis devices market.

Various opportunities available for the other competitor in the dialysis devices 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 dialysis devices market scenario?

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

Target Audience who can be benefited from this Dialysis Devices Market Report Study

Dialysis devices products providers

Research organizations and consulting companies

Dialysis devices-related organizations, associations, forums, and other alliances

Government and corporate offices

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

Distributors and Traders dealing in dialysis devices

Various End-users who want to know more about the dialysis devices market

and latest technological developments in the dialysis devices market.

Frequently Asked Questions for Dialysis Devices Market:

1. What is a dialysis device?

Dialysis devices are medical equipment and consumables that help in substituting for kidney function in events of kidney failure or compromised kidney function to compensate and remove toxins from the body.

2. What is the market for Global Dialysis Devices?

Global dialysis devices market was valued at USD 71.00 billion in 2020, growing at a CAGR of 4.84% during the forecast period from 2021 to 2026 to reach USD 94.30 billion by 2026.

3. What are the drivers for Global Dialysis Devices Market?

The demand for dialysis devices is witnessing a surge majorly due to the rising prevalence of kidney failure due to various reasons such as rising geriatric population wherein age acts as a major risk factor for loss of kidney function, rising prevalence of diabetes in which hyperglycemia is linked with blood vessel damage in kidneys. Furthermore, hypertension is another key factor which is extensively linked with kidney failure. Additionally, the technological advancements such as the development of continuous renal replacement therapy (CRRT) have also been a major influential factor in boosting the growth of the dialysis devices market during the forecast period from 2021-2026.

4. Who are the key players operating in Global Dialysis Devices Market?

Some of the key market players operating in the dialysis devices market includes Fresenius Medical Care, B. Braun Melsungen AG, Nipro Corporation, Dialife SA, Baxter, Cantel Medical Corporation, NIKKISO CO., LTD, Asahi Kasei Medical, NxStage Medical, Inc. Infomed SA, Medtronic, Anjue Medical Equipment Co., Ltd., Dialco Medical Inc., SWS Hemodialysis Care Co.,Ltd, TORAY MEDICAL CO.,LTD., Trivitron Healthcare, BLT Biolight Meditech, QUANTA Dialysis Technologies, and others.

5. Which region has the highest share in Dialysis Devices market?

Among all the regions, North America is estimated to account for the largest share in the dialysis devices market. This domination is due to the rising prevalence of kidney disorders, rising population of patients suffering from lifestyle disorders such as obesity and hypertension. Moreover, extensive efforts in product developmental activities and growing popularity of home-based dialysis devices are further expected to drive the product demand in the North American region. In addition to the above-stated factors, the new product launches and approvals and the extensive coverage of procedural cost specifically in the United States and Canada are expected to further boost the market for dialysis devices in North America.

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