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U.S. Dialysis Centers Market Size, Share & Trends Analysis Report By Modality (In-center, In-home, SNF-based), By Dialysis Type (Hemodialysis, Peritoneal Dialysis), By Facility Type, By Region, And Segment Forecasts, 2023 - 2030

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Abstracts

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U.S. Dialysis Centers Market Growth & Trends

The U.S. dialysis centers market size is expected to reach USD 40.4 billion by 2030, based on a new report by Grand View Research, Inc. The market is expected to expand at a CAGR of 5.29% from 2023 to 2030. The high prevalence of End-Stage Renal Disease (ESRD) and favorable reimbursement are some of the key factors expected to boost growth. The expenditure on treatment is gradually rising due to the increasing prevalence of ESRD.

The availability of Medicare reimbursement for kidney disorder treatment is increasing the accessibility to the treatment. The Center for Medicare & Medicaid Services announced a new end-stage renal diseases treatment choice model for the maintenance & improvement in the reimbursement for chronic kidney disorder patients. The new model is encouraging the use of home-based treatment. In August 2022, the CMS expanded the eligibility for reimbursement for kidney disorder treatment. The expansion includes certain capital assets, mainly equipment used at home for treatment. This is increasing the accessibility to the services.

The patients need to travel to and fro the center for around 3 days per week, the proximity from the patient's residence is generally an important criterion for the center of

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choice. Hence the launch of new facilities is a key strategic initiative undertaken by major players to increase their market share. For instance, in May 2021, U.S. Renal Care, Inc. inaugurated three new facilities, one in-center facility and two focusing on home therapies. This expanded the company's presence in the Southwest Florida region.

The COVID-19 pandemic resulted in patients facing difficulty in having an access to treatment for end-stage renal disorder, requiring multiple sessions within a month. According to the national kidney foundation, 15.8% of the patients undergoing treatment for end-stage renal disease had COVID-19 infection. The federal government & service providers promoted home treatment. In June 2021, a new campaign innovative kidney care was launched by nine leading healthcare organizations for patient options for receiving home treatment.

U.S. Dialysis Centers Market Report Highlights

Based on service, the in-center segment held the largest revenue share in 2022. This can be attributed to the need for assistance & care for the procedure, which can be facilitated better at the centers. The high preference for hemodialysis is also driving the market opportunity as it essentially requires center visits & assistance

Based on dialysis type, hemodialysis dominated the market in 2022. This can be attributed to the preference for the segment by healthcare professionals & longer life expectancy for patients. However peritoneal dialysis is expected to have the fastest growth during the forecast period owing to the effective removal of toxic substances & high convenience of peritoneal dialysis enabling patients to independently have treatment at home

Based on facility type, dialysis chains dominated the market in 2022. This can be attributed to the presence of such chains throughout the U.S. The availability of top-quality equipment and treatment at a lower cost compared to hospital-based facilities is driving the segment's growth. In addition, the key players are acquiring independent facilities, resulting in most of the independent facilities being managed by chains

Based on the region, the southeast region accounted for a significant revenue share in 2022 owing to the better accessibility to treatment and a higher elder population in the region. Florida & Georgia are among the states having the highest geriatric population in the U.S. as per the U.S. census bureau 2020 estimates

The service providers and patients faced challenges since the onset of the COVID-19 pandemic, some of which are unique as compared to other health facilities and treatment groups. For instance, hemodialysis (HD) patients visit centers at least three times a week and during each session, the patients are exposed to all the patients concurrently receiving treatment in a particular session, and to healthcare personnel along with any additional exposure during their travel to and from the center

Mergers & acquisitions and collaborations are being preferred by the key players, enabling them to have a competitive edge by adding value to their services. For Instance, in March 2022, Fresenius Medical Care announced a merger with InterWell Health and Cricket Health for facilitating better kidney disorder solutions

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