

End-Stage Renal Disease Market: Epidemiology, Industry Trends, Share, Size, Growth, Opportunity, and Forecast 2024-2034

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Abstracts

The 7 major end-stage renal disease markets reached a value of US\$ 76.6 Billion in 2023. Looking forward, IMARC Group expects the 7MM to reach US\$ 218.2 Billion by 2034, exhibiting a growth rate (CAGR) of 9.98% during 2024-2034.

The end-stage renal disease market has been comprehensively analyzed in IMARC's new report titled "End-Stage Renal Disease Market: Epidemiology, Industry Trends, Share, Size, Growth, Opportunity, and Forecast 2024-2034". End-stage renal disease, also known as renal failure, is the last stage of chronic kidney disease, in which the kidneys' functioning capabilities drop to very low levels. Since the condition results in the failure of the kidneys' filtering functions, harmful fluids, electrolytes, and toxins can accumulate in the body. The common symptoms of this ailment include loss of appetite, difficulty sleeping, fatigue, itching and dry skin, headache, nausea, weight loss, etc. Some patients may also experience drowsiness, confusion, bone pain, numbness in the feet, hands, or other areas, muscle cramps, abnormally dark or light skin, edema, excessive thirst, frequent hiccups, etc. The diagnosis of end-stage renal disease involves a series of tests and evaluations to determine the extent of kidney damage and its underlying causes. A blood test to check the levels of creatinine and other waste products in the blood can indicate the degree of kidney function. Urine tests can also be performed to check for protein and blood in the urine, which can be signs of kidney damage. Various imaging tests, such as ultrasound and CT scans, can be used to identify any structural abnormalities in the kidneys or urinary tract. In some cases, a kidney biopsy may be done to examine a small sample of kidney tissue.

The increasing prevalence of diabetes and high blood pressure, which cause direct damage to the blood vessels in the kidneys, is primarily driving the end-stage renal

disease market. In addition to this, the rising cases of urinary tract disorders, such as kidney stones, that weaken the kidneys over time, are also bolstering the market growth. Furthermore, the inflating utilization of effective medications, including diuretics, recombinant human erythropoietin, calcium carbonate, etc., to treat the underlying symptoms of the ailment is acting as another significant growth-inducing factor. Apart from this, the escalating application of peritoneal dialysis, owing to its numerous benefits over conventional hemodialysis, such as greater lifestyle flexibility and fewer side effects, is further creating a positive outlook for the market. Moreover, several government bodies are taking initiatives to improve access to healthcare for patients with end-stage renal disease, including increasing funding for dialysis centers and reimbursement rates for providers. This, in turn, is also propelling the market growth. Additionally, the emerging popularity of antidiabetic drugs, such as sodium-glucose co-transporter 2 (SGLT2) inhibitors, for treating the condition since they can lower the risk of ailment progression and improve kidney outcomes in patients is expected to drive the end-stage renal disease market in the coming years.

IMARC Group's new report provides an exhaustive analysis of the end-stage renal disease market in the United States, EU4 (Germany, Spain, Italy, and France), United Kingdom, and Japan. This includes treatment practices, in-market, and pipeline drugs, share of individual therapies, market performance across the seven major markets, market performance of key companies and their drugs, etc. The report also provides the current and future patient pool across the seven major markets. According to the report, the United States has the largest patient pool for end-stage renal disease and also represents the largest market for its treatment. Furthermore, the current treatment practice/algorithm, market drivers, challenges, opportunities, reimbursement scenario, unmet medical needs, etc., have also been provided in the report. This report is a must-read for manufacturers, investors, business strategists, researchers, consultants, and all those who have any kind of stake or are planning to foray into the end-stage renal disease market in any manner.

Recent Developments:

In March 2024, Bayer Healthcare, in collaboration with LASCO Pharmaceutical Division, launched finerenone, marketed as Firalta, to treat chronic kidney disease. The medicine prevents inflammation, reduces fibrosis, and decreases the amount of albumin (a protein whose presence in urine indicates kidney disease) in people suffering from renal disease.

In February 2024, the Central Drugs Standard Control Organisation (CDSCO) granted Jardiance (empagliflozin) 10 mg tablets to decrease the risk of long-term decline in patients with end-stage kidney disease, cardiovascular death, and hospitalization in

adult individuals with chronic kidney disease (CKD), who are at risk of progression. In November 2023, Bayer released pharmacodynamic results for Kerendia (finerenone), the first non-steroidal, effective mineralocorticoid receptor (MR) antagonist to show dual cardiorenal risk mitigation in adult individuals with chronic kidney disease. The findings from FIGARO-BM, an exploratory human biomarker study, confirm Kerendia's mode of action in preventing MR overactivation, which is thought to contribute to inflammation and fibrosis.

In September 2023, Boehringer Ingelheim and Eli Lilly and Company announced that the United States Food and Drug Administration approved Jardiance (empagliflozin) 10 mg tablets to decrease the risk of sustained reductions in estimated glomerular filtration rate, cardiac death, end-stage renal disease, and hospitalization in adults with chronic kidney disease at risk of progression.

Key Highlights:

Every year, around 2.2 lakh new patients are diagnosed with end-stage renal disease in India.

According to the Centers for Disease Control and Prevention, high blood pressure and diabetes are the major causes of kidney failure in the US, accounting for three out of every four new cases.

As per the United States Renal Data System, men are 1.6 times more likely to develop end-stage renal disease than women.

Black people make up around 13% of the entire population, but they account for 30% of those with end-stage renal disease in the United States.

Hispanic individuals are more prone to end-stage renal disease caused by diabetes than Black or White people.

Drugs:

Aronora is developing AB002 (E-WE Thrombin) for the management of thrombosis in end-stage renal disease patients on chronic hemodialysis. This drug is delivered as an intravenous bolus. It is a recombinant antithrombotic and cytoprotective enzyme that targets protein C without enhancing the risk of bleeding.

ISIS 416858 is a single-stranded antisense oligodeoxynucleotide manufactured by Ionis Pharmaceuticals, Inc. It is a highly effective and selective antagonist of FXI mRNA expression.

AB023 (Gruticibart) is a recombinant factor XI (FXI) antibody that precisely inhibits the contact activation of blood. This drug is intended to prevent several thrombotic problems associated with chronic hemodialysis and reduce blood clot formation on catheters and

numerous other intravascular, intracardiac, or extracorporeal medical devices.

Time Period of the Study

Base Year: 2023

Historical Period: 2018-2023

Market Forecast: 2024-2034

Countries Covered

United States

Germany

France

United Kingdom

Italy

Spain

Japan

Analysis Covered Across Each Country

Historical, current, and future epidemiology scenario

Historical, current, and future performance of the end-stage renal disease market

Historical, current, and future performance of various therapeutic categories in the market

Sales of various drugs across the end-stage renal disease market

Reimbursement scenario in the market

In-market and pipeline drugs

Competitive Landscape:

This report also provides a detailed analysis of the current end-stage renal disease marketed drugs and late-stage pipeline drugs.

In-Market Drugs

Drug Overview

Mechanism of Action

Regulatory Status

Clinical Trial Results

Drug Uptake and Market Performance

Late-Stage Pipeline Drugs

Drug Overview

Mechanism of Action

Regulatory Status

Clinical Trial Results

Drug Uptake and Market Performance

*Kindly note that the drugs in the above table only represent a partial list of marketed/pipeline drugs, and the complete list has been provided in the report.

Key Questions Answered in this Report:

Market Insights

How has the end-stage renal disease market performed so far and how will it perform in the coming years?

What are the markets shares of various therapeutic segments in 2023 and how are they expected to perform till 2034?

What was the country-wise size of the end-stage renal disease market across the seven major markets in 2023 and what will it look like in 2034?

What is the growth rate of the end-stage renal disease market across the seven major markets and what will be the expected growth over the next ten years?

What are the key unmet needs in the market?

Epidemiology Insights

What is the number of prevalent cases (?2018-2034?) of end-stage renal disease across the seven major markets?

What is the number of prevalent cases (?2018-2034?) of end-stage renal disease by age across the seven major markets?

What is the number of prevalent cases (?2018-2034?) of end-stage renal disease by gender across the seven major markets?

How many patients are diagnosed (?2018-2034?) with end-stage renal disease across the seven major markets?

What is the size of the end-stage renal disease patient pool (2018-2023) across the seven major markets?

What would be the forecasted patient pool (2024-2034) across the seven major markets?

What are the key factors driving the epidemiological trend of end-stage renal disease?

What will be the growth rate of patients across the seven major markets?

End-Stage Renal Disease: Current Treatment Scenario, Marketed Drugs and Emerging Therapies

What are the current marketed drugs and what are their market performance?

What are the key pipeline drugs and how are they expected to perform in the coming years?

How safe are the current marketed drugs and what are their efficacies?

How safe are the late-stage pipeline drugs and what are their efficacies?

What are the current treatment guidelines for end-stage renal disease drugs across the seven major markets?

Who are the key companies in the market and what are their market shares?

What are the key mergers and acquisitions, licensing activities, collaborations, etc. related to the end-stage renal disease market?

What are the key regulatory events related to the end-stage renal disease market?

What is the structure of clinical trial landscape by status related to the end-stage renal disease market?

What is the structure of clinical trial landscape by phase related to the end-stage renal disease market?

What is the structure of clinical trial landscape by route of administration related to the end-stage renal disease market?

Contents

1 PREFACE

2 SCOPE AND METHODOLOGY

- 2.1 Objectives of the Study
- 2.2 Stakeholders
- 2.3 Data Sources
 - 2.3.1 Primary Sources
 - 2.3.2 Secondary Sources
- 2.4 Market Estimation
 - 2.4.1 Bottom-Up Approach
 - 2.4.2 Top-Down Approach
- 2.5 Forecasting Methodology

3 EXECUTIVE SUMMARY

4 END-STAGE RENAL DISEASE - INTRODUCTION

- 4.1 Overview
- 4.2 Regulatory Process
- 4.3 Epidemiology (2018-2023) and Forecast (2024-2034)
- 4.4 Market Overview (2018-2023) and Forecast (2024-2034)
- 4.5 Competitive Intelligence

5 END-STAGE RENAL DISEASE - DISEASE OVERVIEW

- 5.1 Introduction
- 5.2 Symptoms and Diagnosis
- 5.3 Pathophysiology
- 5.4 Causes and Risk Factors
- 5.5 Treatment

6 PATIENT JOURNEY

7 END-STAGE RENAL DISEASE - EPIDEMIOLOGY AND PATIENT POPULATION

- 7.1 Epidemiology - Key Insights

- 7.2 Epidemiology Scenario - Top 7 Markets
 - 7.2.1 Epidemiology Scenario (2018-2023)
 - 7.2.2 Epidemiology Forecast (2024-2034)
 - 7.2.3 Epidemiology by Age (?2018-2034?)
 - 7.2.4 Epidemiology by Gender (?2018-2034?)
 - 7.2.5 Diagnosed Cases (?2018-2034?)
 - 7.2.6 Patient Pool/Treated Cases (?2018-2034?)
- 7.3 Epidemiology Scenario - United States
 - 7.3.1 Epidemiology Scenario (2018-2023)
 - 7.3.2 Epidemiology Forecast (2024-2034)
 - 7.3.3 Epidemiology by Age (?2018-2034?)
 - 7.3.4 Epidemiology by Gender (?2018-2034?)
 - 7.3.5 Diagnosed Cases (?2018-2034?)
 - 7.3.6 Patient Pool/Treated Cases (?2018-2034?)
- 7.4 Epidemiology Scenario - Germany
 - 7.4.1 Epidemiology Scenario (2018-2023)
 - 7.4.2 Epidemiology Forecast (2024-2034)
 - 7.4.3 Epidemiology by Age (?2018-2034?)
 - 7.4.4 Epidemiology by Gender (?2018-2034?)
 - 7.4.5 Diagnosed Cases (?2018-2034?)
 - 7.4.6 Patient Pool/Treated Cases (?2018-2034?)
- 7.5 Epidemiology Scenario - France
 - 7.5.1 Epidemiology Scenario (2018-2023)
 - 7.5.2 Epidemiology Forecast (2024-2034)
 - 7.5.3 Epidemiology by Age (?2018-2034?)
 - 7.5.4 Epidemiology by Gender (?2018-2034?)
 - 7.5.5 Diagnosed Cases (?2018-2034?)
 - 7.5.6 Patient Pool/Treated Cases (?2018-2034?)
- 7.6 Epidemiology Scenario - United Kingdom
 - 7.6.1 Epidemiology Scenario (2018-2023)
 - 7.6.2 Epidemiology Forecast (2024-2034)
 - 7.6.3 Epidemiology by Age (?2018-2034?)
 - 7.6.4 Epidemiology by Gender (?2018-2034?)
 - 7.6.5 Diagnosed Cases (?2018-2034?)
 - 7.6.6 Patient Pool/Treated Cases (?2018-2034?)
- 7.7 Epidemiology Scenario - Italy
 - 7.7.1 Epidemiology Scenario (2018-2023)
 - 7.7.2 Epidemiology Forecast (2024-2034)
 - 7.7.3 Epidemiology by Age (?2018-2034?)

- 7.7.4 Epidemiology by Gender (?2018-2034?)
- 7.7.5 Diagnosed Cases (?2018-2034?)
- 7.7.6 Patient Pool/Treated Cases (?2018-2034?)
- 7.8 Epidemiology Scenario - Spain
 - 7.8.1 Epidemiology Scenario (2018-2023)
 - 7.8.2 Epidemiology Forecast (2024-2034)
 - 7.8.3 Epidemiology by Age (?2018-2034?)
 - 7.8.4 Epidemiology by Gender (?2018-2034?)
 - 7.8.5 Diagnosed Cases (?2018-2034?)
 - 7.8.6 Patient Pool/Treated Cases (?2018-2034?)
- 7.9 Epidemiology Scenario - Japan
 - 7.9.1 Epidemiology Scenario (2018-2023)
 - 7.9.2 Epidemiology Forecast (2024-2034)
 - 7.9.3 Epidemiology by Age (?2018-2034?)
 - 7.9.4 Epidemiology by Gender (?2018-2034?)
 - 7.9.5 Diagnosed Cases (?2018-2034?)
 - 7.9.6 Patient Pool/Treated Cases (?2018-2034?)

8 END-STAGE RENAL DISEASE - TREATMENT ALGORITHM, GUIDELINES, AND MEDICAL PRACTICES

- 8.1 Guidelines, Management and Treatment
- 8.2 Treatment Algorithm

9 END-STAGE RENAL DISEASE - UNMET NEEDS

10 END-STAGE RENAL DISEASE - KEY ENDPOINTS OF TREATMENT

11 END-STAGE RENAL DISEASE - MARKETED PRODUCTS

- 11.1 List of End-Stage Renal Disease Marketed Drugs Across the Top 7 Markets
 - 11.1.1 Drug Name – Company Name
 - 11.1.1.1 Drug Overview
 - 11.1.1.2 Mechanism of Action
 - 11.1.1.3 Regulatory Status
 - 11.1.1.4 Clinical Trial Results
 - 11.1.1.5 Sales Across Major Markets

Kindly note that the complete list of marketed drugs has been provided in the report.

12 END-STAGE RENAL DISEASE - PIPELINE DRUGS

12.1 List of End-Stage Renal Disease Pipeline Drugs Across the Top 7 Markets

12.1.1 AB 002 - Aronora

12.1.1.1 Drug Overview

12.1.1.2 Mechanism of Action

12.1.1.3 Clinical Trial Results

12.1.1.4 Safety and Efficacy

12.1.1.5 Regulatory Status

12.1.2 ISIS 416858 - Ionis Pharmaceuticals, Inc.

12.1.2.1 Drug Overview

12.1.2.2 Mechanism of Action

12.1.2.3 Clinical Trial Results

12.1.2.4 Safety and Efficacy

12.1.2.5 Regulatory Status

12.1.3 AB 023- Aronora

12.1.3.1 Drug Overview

12.1.3.2 Mechanism of Action

12.1.3.3 Clinical Trial Results

12.1.3.4 Safety and Efficacy

12.1.3.5 Regulatory Status

Kindly note that the above only represents a partial list of pipeline drugs, and the complete list has been provided in the report.

13. END-STAGE RENAL DISEASE - ATTRIBUTE ANALYSIS OF KEY MARKETED AND PIPELINE DRUGS

14. END-STAGE RENAL DISEASE – CLINICAL TRIAL LANDSCAPE

14.1 Drugs by Status

14.2 Drugs by Phase

14.3 Drugs by Route of Administration

14.4 Key Regulatory Events

15 END-STAGE RENAL DISEASE - MARKET SCENARIO

15.1 Market Scenario - Key Insights

15.2 Market Scenario - Top 7 Markets

15.2.1 End-Stage Renal Disease - Market Size

- 15.2.1.1 Market Size (2018-2023)
- 15.2.1.2 Market Forecast (2024-2034)
- 15.2.2 End-Stage Renal Disease - Market Size by Therapies
 - 15.2.2.1 Market Size by Therapies (2018-2023)
 - 15.2.2.2 Market Forecast by Therapies (2024-2034)
- 15.3 Market Scenario - United States
 - 15.3.1 End-Stage Renal Disease - Market Size
 - 15.3.1.1 Market Size (2018-2023)
 - 15.3.1.2 Market Forecast (2024-2034)
 - 15.3.2 End-Stage Renal Disease - Market Size by Therapies
 - 15.3.2.1 Market Size by Therapies (2018-2023)
 - 15.3.2.2 Market Forecast by Therapies (2024-2034)
 - 15.3.3 End-Stage Renal Disease - Access and Reimbursement Overview
- 15.4 Market Scenario - Germany
 - 15.4.1 End-Stage Renal Disease - Market Size
 - 15.4.1.1 Market Size (2018-2023)
 - 15.4.1.2 Market Forecast (2024-2034)
 - 15.4.2 End-Stage Renal Disease - Market Size by Therapies
 - 15.4.2.1 Market Size by Therapies (2018-2023)
 - 15.4.2.2 Market Forecast by Therapies (2024-2034)
 - 15.4.3 End-Stage Renal Disease - Access and Reimbursement Overview
- 15.5 Market Scenario - France
 - 15.5.1 End-Stage Renal Disease - Market Size
 - 15.5.1.1 Market Size (2018-2023)
 - 15.5.1.2 Market Forecast (2024-2034)
 - 15.5.2 End-Stage Renal Disease - Market Size by Therapies
 - 15.5.2.1 Market Size by Therapies (2018-2023)
 - 15.5.2.2 Market Forecast by Therapies (2024-2034)
 - 15.5.3 End-Stage Renal Disease - Access and Reimbursement Overview
- 15.6 Market Scenario - United Kingdom
 - 15.6.1 End-Stage Renal Disease - Market Size
 - 15.6.1.1 Market Size (2018-2023)
 - 15.6.1.2 Market Forecast (2024-2034)
 - 15.6.2 End-Stage Renal Disease - Market Size by Therapies
 - 15.6.2.1 Market Size by Therapies (2018-2023)
 - 15.6.2.2 Market Forecast by Therapies (2024-2034)
 - 15.6.3 End-Stage Renal Disease - Access and Reimbursement Overview
- 15.7 Market Scenario - Italy
 - 15.7.1 End-Stage Renal Disease - Market Size

- 15.7.1.1 Market Size (2018-2023)
- 15.7.1.2 Market Forecast (2024-2034)
- 15.7.2 End-Stage Renal Disease - Market Size by Therapies
 - 15.7.2.1 Market Size by Therapies (2018-2023)
 - 15.7.2.2 Market Forecast by Therapies (2024-2034)
- 15.7.3 End-Stage Renal Disease - Access and Reimbursement Overview
- 15.8 Market Scenario - Spain
 - 15.8.1 End-Stage Renal Disease - Market Size
 - 15.8.1.1 Market Size (2018-2023)
 - 15.8.1.2 Market Forecast (2024-2034)
 - 15.8.2 End-Stage Renal Disease - Market Size by Therapies
 - 15.8.2.1 Market Size by Therapies (2018-2023)
 - 15.8.2.2 Market Forecast by Therapies (2024-2034)
 - 15.8.3 End-Stage Renal Disease - Access and Reimbursement Overview
- 15.9 Market Scenario - Japan
 - 15.9.1 End-Stage Renal Disease - Market Size
 - 15.9.1.1 Market Size (2018-2023)
 - 15.9.1.2 Market Forecast (2024-2034)
 - 15.9.2 End-Stage Renal Disease - Market Size by Therapies
 - 15.9.2.1 Market Size by Therapies (2018-2023)
 - 15.9.2.2 Market Forecast by Therapies (2024-2034)
 - 15.9.3 End-Stage Renal Disease - Access and Reimbursement Overview

16 END-STAGE RENAL DISEASE - RECENT EVENTS AND INPUTS FROM KEY OPINION LEADERS

17 END-STAGE RENAL DISEASE MARKET - SWOT ANALYSIS

- 17.1 Strengths
- 17.2 Weaknesses
- 17.3 Opportunities
- 17.4 Threats

18 END-STAGE RENAL DISEASE MARKET – STRATEGIC RECOMMENDATIONS

19 APPENDIX

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