

Hemodialysis Market Report by Segment (Hemodialysis Product, Hemodialysis Service), Modality (Conventional Hemodialysis, Short Daily Hemodialysis, Nocturnal Hemodialysis), End-User (Hospitals, Independent Dialysis Centres, and Others), and Region 2024-2032

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Abstracts

The global hemodialysis market size reached US\$ 90.7 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 126.7 Billion by 2032, exhibiting a growth rate (CAGR) of 3.7% during 2024-2032. The increasing collaborations between healthcare providers and dialysis manufacturers promote treatment availability, the rising prevalence of hypertension-related kidney diseases, the limited organ availability, the growing awareness about kidney diseases, and advocacy for improved dialysis access are some of the factors propelling the market.

Hemodialysis is a life-saving medical procedure for treating individuals with advanced kidney disease or kidney failure. It involves using a specialized machine called a dialyzer to remove waste, excess fluids, and electrolytes from the blood when the kidneys can no longer perform these functions effectively. During hemodialysis, a patient's blood is diverted from their body through a vascular access point (usually a surgically created fistula or graft) to the dialyzer. The blood is filtered through a semipermeable membrane within the dialyzer, allowing waste and excess substances to pass out of the blood and into a dialysate solution. The filtered blood is then returned to the patient's body. Hemodialysis sessions typically last several hours and are generally performed multiple times a week. The frequency and duration depend on the patient's specific medical condition and the advice of their healthcare provider. It plays a crucial role in maintaining the body's balance of fluids and electrolytes, effectively managing

blood pressure, and preventing the accumulation of harmful waste products that would otherwise lead to serious health complications. While it is a demanding and often lifelong treatment, hemodialysis significantly enhances the quality of life and longevity of individuals with kidney failure.

The global market is majorly driven by the increasing incidence of chronic kidney diseases. In line with this, the rising aging population is more susceptible to kidney-related issues, leading to a higher need for hemodialysis. Furthermore, the global diabetes epidemic contributes significantly to kidney disease cases, necessitating hemodialysis. Apart from this, obesity-related kidney diseases fuel the demand for hemodialysis treatments. Moreover, better access to medical facilities has led to increased diagnosis and treatment of kidney diseases. Technological innovations in dialysis machines and procedures improve treatment efficiency. Besides, the escalating awareness about kidney health encourages early intervention and dialysis. Additionally, favorable reimbursement policies enable patients to afford hemodialysis treatments.

Hemodialysis Market Trends/Drivers:

Increasing medical tourism

The growing trend of medical tourism is stimulating the market. Countries with advanced healthcare facilities and lower treatment costs attract patients seeking high-quality hemodialysis services. Medical tourists often choose regions where they can access specialized care, including hemodialysis, at a fraction of the cost they would incur in their home countries. This influx of international patients necessitates the establishment of well-equipped dialysis centers to cater to their needs. Healthcare providers in medical tourism hubs expand their dialysis capacities, employ skilled professionals, and adopt advanced technologies to accommodate the rising demand. As medical tourism continues to rise, the market experiences growth due to the increased volume of patients seeking treatment away from home.

Expansion of dialysis centers worldwide

The global expansion of dialysis centers is pivotal in propelling the market. With more dialysis facilities being established across different regions, access to hemodialysis treatments becomes more widespread. These centers ensure patients with kidney diseases have convenient and timely access to life-sustaining hemodialysis procedures. The expanded network of dialysis centers not only accommodates the growing patient population and facilitates early diagnosis and intervention. This expansion drives market growth by creating a more accessible and patient-centered environment for individuals

needing regular hemodialysis sessions. Furthermore, the presence of a broader range of dialysis centers fosters competition, which, in turn, encourages technological advancements and service improvements, enhancing the overall quality of care provided and fueling the demand for hemodialysis services.

Shortage of nephrologists

The shortage of nephrologists is bolstering the market. With fewer nephrologists available to manage the increasing number of kidney disease cases, the demand for hemodialysis services increases. To address this scarcity, healthcare providers expand their hemodialysis offerings, opening new centers and increasing treatment capacities. This phenomenon also encourages the development and implementation of telemedicine solutions, enabling remote consultations and monitoring of hemodialysis patients. Additionally, the shortage prompts healthcare institutions to invest in training and upskilling programs for medical professionals to address the gap in nephrology care. This collaborative effort to cope with the nephrologist shortage results in the wider availability of hemodialysis treatments, ultimately driving the market's growth as more patients rely on these services to manage their kidney health effectively.

Hemodialysis Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global hemodialysis market report, along with forecasts at the global and regional levels from 2024-2032. Our report has categorized the market based on segment, modality, and end-user.

Breakup by Segment:

Hemodialysis Product

Machines

Dialyzers

Others

Hemodialysis Service

In-center Services

Home Services

Hemodialysis service dominates the market

The report has provided a detailed breakup and analysis of the market based on the segment. This includes hemodialysis product (machines, dialyzers, and others) and

hemodialysis service (in-center services and home services). According to the report, hemodialysis service represented the largest segment.

The hemodialysis service segment is bolstering the market due to its essential role in delivering life-sustaining treatments to individuals with kidney diseases. As the prevalence of kidney-related conditions rises, the demand for hemodialysis services escalates. These services encompass a comprehensive range of treatments, including pre-dialysis assessments, dialysis sessions, post-treatment care, and patient education. The convenience of receiving expert care within specialized centers or even through home-based setups attracts patients seeking efficient and regular hemodialysis.

Moreover, the adoption of advanced technologies and personalized treatment plans within hemodialysis services enhances treatment effectiveness and patient outcomes. As healthcare providers continue to invest in expanding and refining their hemodialysis service offerings, the segment significantly contributes to market growth by ensuring accessible, quality care for patients dependent on these life-saving procedures.

Breakup by Modality:

Conventional Hemodialysis

Short Daily Hemodialysis

Nocturnal Hemodialysis

Conventional hemodialysis dominates the market

The report has provided a detailed breakup and analysis of the market based on the modality. This includes conventional hemodialysis, short daily hemodialysis, and nocturnal hemodialysis. According to the report, conventional hemodialysis represented the largest segment.

The conventional hemodialysis modality drives market growth due to its widespread adoption and established efficacy in treating kidney diseases. This modality involves using a dialysis machine to filter and cleanse the blood, removing waste and excess fluids. Its long-standing presence and familiarity in medical practice make it a preferred choice for patients and healthcare providers. As the prevalence of kidney diseases increases, the demand for effective treatment options escalates, leading to the continued prominence of conventional hemodialysis.

Additionally, technological advancements have improved dialysis machine efficiency,

safety, and patient comfort. These enhancements further bolster the appeal of conventional hemodialysis as a reliable and proven method for managing kidney-related conditions, thereby contributing significantly to the market's overall growth.

Breakup by End-User:

Hospitals
Independent Dialysis Centres
Others

The report has provided a detailed breakup and analysis of the market based on the end-user. This includes hospitals, independent dialysis centres, and others.

Hospitals with advanced medical infrastructure and expert staff provide comprehensive hemodialysis services to multiple patients. Their ability to handle complex cases, offer integrated care, and provide emergency services contributes to the market's expansion.

On the other hand, independent dialysis centers offer specialized care focused solely on hemodialysis. These centers promote convenience and tailored treatment plans, catering to the specific needs of patients. Their growth stems from increased patient preference for outpatient care, flexibility, and proximity to home.

Both segments foster competition, encouraging advancements in treatment quality, technology, and patient experience. As demand for hemodialysis rises, the combined efforts of hospitals and independent centers ensure broader access to life-sustaining treatments, propelling the market forward and meeting the diverse needs of individuals with kidney diseases.

Breakup by Region:

Asia Pacific
Europe
North America
Middle East and Africa
Latin America

North America exhibits a clear dominance, accounting for the largest hemodialysis market share

The report has also provided a comprehensive analysis of all the major regional markets, which include Asia Pacific, Europe, North America, Middle East and Africa, and Latin America. According to the report, North America was the largest market for hemodialysis.

The North American region is a significant driver of market growth due to its advanced healthcare infrastructure, increasing prevalence of kidney diseases, and heightened awareness about renal health. Well-established medical facilities and technological advancements enable the delivery of high-quality hemodialysis services. A rising aging population and lifestyle-related factors contribute to the growing incidence of kidney diseases, thereby propelling the demand for effective treatments like hemodialysis.

Moreover, North America's proactive healthcare policies and reimbursement systems facilitate patient access to these vital procedures. The region's emphasis on research and development leads to continuous improvements in hemodialysis techniques, equipment, and patient care. The partnership between healthcare institutions and industry players further accelerates innovation. The region's robust healthcare ecosystem, coupled with increasing patient needs, ensures the steady expansion of the market.

Competitive Landscape:

Top companies are strengthening the market through innovative products, strategic expansions, and commitment to improving patient outcomes. These companies invest in research and development, continuously introducing advanced dialysis machines, equipment, and solutions that enhance treatment effectiveness and patient comfort. Their focus on technological innovation, such as improved filtration systems and connectivity features, raises the quality of care. Moreover, these companies engage in strategic partnerships and acquisitions, expanding their global reach and enhancing their service portfolios. By collaborating with healthcare institutions and professionals, they facilitate the establishment of specialized dialysis centers and enable easier access to treatments. Additionally, top companies prioritize patient education and support, offering training programs and resources to medical staff and patients. This approach fosters awareness, adherence, and better management of kidney-related conditions, ultimately driving sustained market growth.

The report has provided a comprehensive analysis of the competitive landscape in the hemodialysis market. Detailed profiles of all major companies have also been provided.

Baxter International

Asahi Kasei Corporation
B. Barun Melsungen
DaVita
Cantel Medical Corporation
Fresenius Medical Care
Nipro Corporation
Rockwell Medical
Medivators
Toray Medical Company Ltd.
Nikkiso Co. Ltd.
Surni Group
Gambro
Satellite Healthcare Inc.
Renacon Pharma Ltd.

Recent Developments:

In 2020, Fresenius Medical Care expanded its home dialysis offerings, emphasizing the importance of home-based treatments during the COVID-19 pandemic. They also announced collaborations to enhance remote patient monitoring and telehealth services.

In 2020, Baxter introduced the SHARESOURCE 2 telehealth platform for Peritoneal Dialysis (PD) patients, enhancing remote patient management and communication between patients and healthcare providers.

In 2020, Asahi Kasei announced a partnership with BioPorto to distribute the NGAL Test, a diagnostic tool for the early detection of acute kidney injury, helping better patient management.

Key Questions Answered in This Report

1. How big is the global hemodialysis market?
2. What is the expected growth rate of the global hemodialysis market during 2024-2032?
3. What are the key factors driving the global hemodialysis market?
4. What has been the impact of COVID-19 on the global hemodialysis market?
5. What is the breakup of the global hemodialysis market based on the segment?
6. What is the breakup of the global hemodialysis market based on the modality?
7. What are the key regions in the global hemodialysis market?
8. Who are the key players/companies in the global hemodialysis 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 INTRODUCTION

- 4.1 Overview
- 4.2 Key Industry Trends

5 GLOBAL HEMODIALYSIS MARKET

- 5.1 Market Overview
- 5.2 Market Performance
- 5.3 Impact of COVID-19
- 5.4 Market Breakup by Segment
 - 5.4.1 Market Breakup by Product
 - 5.4.2 Market Breakup by Service
- 5.5 Market Breakup by Modality
- 5.6 Market Breakup by End-User
- 5.7 Market Breakup by Region
- 5.8 Market Forecast

6 MARKET BREAKUP BY SEGMENT

- 6.1 Hemodialysis Product

- 6.1.1 Market Trends
- 6.1.2 Market Breakup by Product
 - 6.1.2.1 Machines
 - 6.1.2.2 Dialyzers
 - 6.1.2.3 Others
- 6.1.3 Market Forecast
- 6.2 Hemodialysis Service
 - 6.2.1 Market Trends
 - 6.2.2 Market Breakup by Service
 - 6.2.2.1 In-center Services
 - 6.2.2.2 Home Services
 - 6.2.3 Market Forecast

7 MARKET BREAKUP BY MODALITY

- 7.1 Conventional Hemodialysis
 - 7.1.1 Market Trends
 - 7.1.2 Market Forecast
- 7.2 Short Daily Hemodialysis
 - 7.2.1 Market Trends
 - 7.2.2 Market Forecast
- 7.3 Nocturnal Hemodialysis
 - 7.3.1 Market Trends
 - 7.3.2 Market Forecast

8 MARKET BREAKUP BY END-USER

- 8.1 Hospitals
 - 8.1.1 Market Trends
 - 8.1.2 Market Forecast
- 8.2 Independent Dialysis Centres
 - 8.2.1 Market Trends
 - 8.2.2 Market Forecast
- 8.3 Others
 - 8.3.1 Market Trends
 - 8.3.2 Market Forecast

9 MARKET BREAKUP BY REGION

9.1 Asia Pacific

9.1.1 Market Trends

9.1.2 Market Forecast

9.2 Europe

9.2.1 Market Trends

9.2.2 Market Forecast

9.3 North America

9.3.1 Market Trends

9.3.2 Market Forecast

9.4 Middle East and Africa

9.4.1 Market Trends

9.4.2 Market Forecast

9.5 Latin America

9.5.1 Market Trends

9.5.2 Market Forecast

10 SWOT ANALYSIS

10.1 Overview

10.2 Strengths

10.3 Weaknesses

10.4 Opportunities

10.5 Threats

11 VALUE CHAIN ANALYSIS

12 PORTER'S FIVE FORCES ANALYSIS

12.1 Overview

12.2 Bargaining Power of Buyers

12.3 Bargaining Power of Suppliers

12.4 Degree of Competition

12.5 Threat of New Entrants

12.6 Threat of Substitutes

13 COMPETITIVE LANDSCAPE

13.1 Market Structure

13.2 Key Players

13.3 Profiles of Key Players

- 13.3.1 Baxter International
- 13.3.2 Asahi Kasei Corporation
- 13.3.3 B. Barun Melsungen
- 13.3.4 DaVita
- 13.3.5 Cantel Medical Corporation
- 13.3.6 Fresenius Medical Care
- 13.3.7 Nipro Corporation
- 13.3.8 Rockwell Medical
- 13.3.9 Medivators
- 13.3.10 Toray Medical Company Ltd.
- 13.3.11 Nikkiso Co. Ltd.
- 13.3.12 Surni Group
- 13.3.13 Gambro
- 13.3.14 Satellite Healthcare Inc.
- 13.3.15 Renacon Pharma Ltd.

List Of Tables

LIST OF TABLES

Table 1: Global: Hemodialysis Market: Key Industry Highlights, 2023 and 2032

Table 2: Global: Hemodialysis Market Forecast: Breakup by Segment (in Billion US\$), 2024-2032

Table 3: Global: Hemodialysis Market Forecast: Breakup by Modality (in Billion US\$), 2024-2032

Table 4: Global: Hemodialysis Market Forecast: Breakup by End-User (in Billion US\$), 2024-2032

Table 5: Global: Hemodialysis Market Forecast: Breakup by Region (in Billion US\$), 2024-2032

Table 6: Global: Hemodialysis Market Structure

Table 7: Global: Hemodialysis Market: Key Players

List Of Figures

LIST OF FIGURES

Figure 1: Global: Hemodialysis Market: Major Drivers and Challenges

Figure 2: Global: Hemodialysis Market: Sales Value (in Billion US\$), 2018-2023

Figure 3: Global: Hemodialysis Market: Breakup by Segment (in %), 2023

Figure 4: Global: Hemodialysis Market: Breakup by Product (in %), 2023

Figure 5: Global: Hemodialysis Market: Breakup by Service (in %), 2023

Figure 6: Global: Hemodialysis Market: Breakup by Modality (in %), 2023

Figure 7: Global: Hemodialysis Market: Breakup by End-User (in %), 2023

Figure 8: Global: Hemodialysis Market: Breakup by Region (in %), 2023

Figure 9: Global: Hemodialysis Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 10: Global: Hemodialysis Industry: SWOT Analysis

Figure 11: Global: Hemodialysis Industry: Value Chain Analysis

Figure 12: Global: Hemodialysis Industry: Porter's Five Forces Analysis

Figure 13: Global: Hemodialysis (Hemodialysis Product) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 14: Global: Hemodialysis (Hemodialysis Product) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 15: Global: Hemodialysis (Hemodialysis Service) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 16: Global: Hemodialysis (Hemodialysis Service) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 17: Global: Hemodialysis (Conventional Hemodialysis) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 18: Global: Hemodialysis (Conventional Hemodialysis) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 19: Global: Hemodialysis (Short Daily Hemodialysis) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 20: Global: Hemodialysis (Short Daily Hemodialysis) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 21: Global: Hemodialysis (Nocturnal Hemodialysis) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 22: Global: Hemodialysis (Nocturnal Hemodialysis) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 23: Global: Hemodialysis (Hospitals) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 24: Global: Hemodialysis (Hospitals) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 25: Global: Hemodialysis (Independent Dialysis Centres) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 26: Global: Hemodialysis (Independent Dialysis Centres) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 27: Global: Hemodialysis (Other End-Users) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 28: Global: Hemodialysis (Other End-Users) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 29: Asia Pacific: Hemodialysis Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 30: Asia Pacific: Hemodialysis Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 31: Europe: Hemodialysis Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 32: Europe: Hemodialysis Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 33: North America: Hemodialysis Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 34: North America: Hemodialysis Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 35: Middle East and Africa: Hemodialysis Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 36: Middle East and Africa: Hemodialysis Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 37: Latin America: Hemodialysis Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 38: Latin America: Hemodialysis Market Forecast: Sales Value (in Billion US\$), 2024-2032

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