

# Global Dialysis Market Forecast to 2025

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## Abstracts

Global Dialysis Market: Drivers, Restraints, Opportunities, Trends, and Forecast up to 2025

[128 pages report] This market research report includes a detailed segmentation of the global dialysis market by procedure types (hemodialysis and peritoneal dialysis), by product types (equipments, consumables, and services), by end-users (hospitals, dialysis centers, and others), and by regions (North America, Europe, APAC, and RoW).

### Research Overview

Infoholic Research predicts that the global dialysis market will grow at a CAGR of 5.0% during the forecast period 2019-2024. The market is classified into different procedure categories: hemodialysis and peritoneal dialysis and by product types: equipments, consumables, and services. The adoption of hemodialysis or peritoneal dialysis is mandate for a person suffering from chronic kidney diseases. The device is popular in all healthcare facilities and the increase use of dialysis machines have bought a significant clinical purpose for treating ESRD. The hospital and other healthcare facilities have separate dialysis units. Similarly, the other care centers are propelling with cost-effective dialysis machines and supplies.

Dialysis market is driven by innovative and advanced technical medical devices that have applied to dialysis machine. The introduction of new generation sensors, components, and single chip solutions components have made a significant impact on the design and structure of the dialysis machine. Most of the manufacturers have high focus on patient and operator parameters as this machine is highly regulated and certified based on safety parameters. This is further been regulated by regularity bodies such as FDA, CE, and CDSCO, which has imposed huge challenges for the medical device manufacturers. Further, the market is expected to see a significant growth with

increase in diseases patterns and new wave in the innovation in dialysis.

#### Segmentation by Procedure Types:

Hemodialysis

Peritoneal dialysis

Hemodialysis segment was valued over \$70.1 billion in 2018 and is estimated to grow with a similar trend during the forecast period. Increasing demand for hemodialysis and peritoneal dialysis in treatment of chronic renal diseases is expected to increase the product market.

Peritoneal dialysis segment is expected to grow at a CAGR of more than 6% during the forecast period. The rise in technological advancements and increase preference for peritoneal dialysis in recent years is accelerating the growth in coming years.

#### Segmentation by End-users:

Hospitals

Dialysis centers

Others

In 2018, hospitals gained the highest share in the dialysis market with large volumes of diagnostics and treatments globally.

#### Segmentation by Regions:

North America

Europe

APAC

RoW

In terms of regional analysis, the market is dominated by North America due to advancements in technology, presence of leading vendors, increase in regulatory reforms, and changes in reimbursement policies. Europe is followed by North America and has similar potential in growth and development. APAC is the most focused and fastest growing region due to vast opportunities for vendors to establish their presence. The factors such as the presence of a large pool of chronic patients, increasing aging population, support from the government, and health & wellness programs are expected to boost the market growth. APAC, Latin America, and RoW are the most focused and fastest growing regions due to vast opportunities. Moreover, most of the countries in these regions are focusing on increasing healthcare expenditure from the government as there is excess growth in medical technology in Brazil, China, India, Mexico, Indonesia, Iran, South Korea, Nigeria, and South Africa.

**Competitive Analysis** – The competition among leading vendors is due to the availability of a wide range of dialysis machines with different brand names in the market. This provides an opportunity for healthcare consumers (dialysis services facilities) to choose products based on brand, price, features, model, and discount. Most of the vendors are focusing on providing bundling product models for increasing their sales and having a larger market share in terms of revenue. Many vendors have established their market presence globally and focus strongly on marketing and selling their products by competing with small and regional vendors. Therefore, the competition among the vendors is expected to hinder the market growth, yet the market will have more products developed and launched. Most of the vendors are primarily focusing on research and development to offer fast technological progress. Manufacturers including major and mid-sized companies in the dialysis market are competing with newer products, advanced features, quality, safety, and efficacy.

The competition is growing among the healthcare service providers – hospitals, dialysis centers, and other healthcare facilities where the customer groups are being consolidated for purchasing products. Diversified product portfolio companies, large volume product buyers (hospitals), and primary competitors (single product manufacturers) have strong market positions in certain segments and regions due to their wide range of products and services they offer. New competitors especially from Asia are also taking the competition to a new high with quality, safety, and efficacy of the product over the past few years.

**Key Vendors:**

Fresenius Medical Care AG & Co. KGaA

Baxter International, Inc.

DaVita Inc.

Nipro Corporation

B. Braun Avitum AG

Diaverum Deutschland GmbH

Nikkiso Co. Ltd.

NxStage Medical, Inc.

#### Key Competitive Facts:

The market is highly competitive with all the players competing to gain the market share. Intense competition, rapid advancements in technology, frequent changes in government policies, and the prices are key factors that confront the market.

The requirement of high initial investment, implementation, and maintenance cost in the market are also limiting the entry of new players.

Responding to competitive pricing pressures specific to each of our geographic markets.

Protection of proprietary technology for products and manufacturing processes.

Benefits – The report provides complete details about the usage and adoption rate of dialysis systems. Thus, the key stakeholders can know about the major trends, drivers, investments, vertical player's initiatives, and government initiatives towards the medical devices segment in the upcoming years along with details of the pureplay companies entering the market. Moreover, the report provides details about the major challenges that are going to impact the market growth. Additionally, the report gives complete

details about the key business opportunities to key stakeholders in order to expand their business and capture the revenue in specific verticals and to analyze before investing or expanding the business in this market.

#### Key Takeaways:

Understanding the potential market opportunity with precise market size and forecast data.

Detailed market analysis focusing on the growth of the dialysis industry.

Factors influencing the growth of the dialysis market.

In-depth competitive analysis of dominant and pureplay vendors.

Prediction analysis of the dialysis industry in both developed and developing regions.

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