

# **Asia and North Africa Hemodialysis & Peritoneal Dialysis Market by Products (Machine, Dialyzer, Bloodlines, Concentrates, Catheters, & Transfer Sets) and Services (In-Center and Home) - Forecast to 2020**

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## **Abstracts**

The dialysis market in emerging nations is projected to reach USD 35.9 billion by 2020, growing at a CAGR of 9.2% during the forecast period.

The rising prevalence of end-stage renal disease (ESRD), diabetes, and hypertension is stimulating the demand for dialysis treatment in the emerging nations. Furthermore, low preference of patients for kidney transplantation, technological advancements, and substantial government healthcare expenditure on the treatment of ESRD are adding to the growth prospects of dialysis products and services market in the emerging nations. However, factors such as limited reimbursement for dialysis in developing countries, high cost of dialysis treatment, lack of awareness about kidney diseases & treatment procedures among patients, and reuse of hemodialysis supplies are restraining the growth of this market.

In this report, the dialysis market in emerging nations is categorized into two broad segments, namely, hemodialysis and peritoneal dialysis.

The hemodialysis market is segmented into products and services. Hemodialysis products include hemodialysis machines and hemodialysis consumables/supplies, whereas hemodialysis services are classified into in-center services and home services. As of 2015, the services segment commanded the largest share of the hemodialysis market, and is expected to grow at a high CAGR from 2015 to 2020. The increasing number of dialysis centers coupled with the growing prevalence of ESRD is promoting the growth of the hemodialysis services market in emerging nations.

The peritoneal dialysis market, segmented into products and services, includes peritoneal dialysis machines, concentrates/dialysates, catheters, transfer sets, and other consumables such as tubing sets, drain bags, disconnect caps, bag connections, catheter stabilizing devices, and ports. In 2015, the products segment commanded the largest share of the peritoneal dialysis market. The increasing patient preference towards PD treatment due to its flexibility and availability of advanced PD machines/consumables in emerging nations are driving the growth of the peritoneal dialysis products market.

Geographically, the dialysis market in emerging nations is segmented into India, Asia (excluding India), and the MENA region. The market in Asia is expected to grow at a higher rate during the forecast period (2015-2020). This high growth is predominantly driven by the growing number of dialysis centers, low preference for kidney transplantation, rising awareness about renal diseases, development of low-cost products, and increasing focus of dialysis firms on the Asian market. The Indian dialysis market is expected to witness a lucrative CAGR during the forecast period due to the growing patient base, government focus on providing low-cost dialysis treatment and promoting the indigenous manufacturing of dialysis products, and the growing adoption of home dialysis treatment in the country.

The dialysis market in emerging nations is diversified and competitive with the presence of a large number of players. In 2014, Fresenius Medical Care AG & Co., KGaA (Germany), Baxter International, Inc. (U.S.), B. Braun Melsungen AG (Germany), Nipro Corporation (Japan), and Nikkiso Co., Ltd. (Japan) were the leading companies in the dialysis products market in emerging nations. DaVita Health Care Partners, Inc. (U.S.), Fresenius Nephrocare (Germany), and Diaverum Deutschland GmbH (Germany) were the top three players in the dialysis services market in emerging nations.

#### Reasons to Buy the Report:

This research report focuses on various levels of analysis—industry trend analysis, business models, market share analysis of top players, and company profiles. This analysis comprise helps discuss the competitive landscape and identify emerging and high-growth segments of the dialysis market in emerging nations, high-growth product segments, government initiatives, drivers, restraints, and opportunities. The above mentioned market research data, current market size, and forecast of future trends helps existing players and new entrants to make the necessary decisions regarding the product offerings, geographic focus, change in strategic approach, R&D investment for

innovation in products and technologies, and levels of output in order to remain successful.

Firms purchasing the report could use any one or combination of the below mentioned four strategies (market penetration, market development, market diversification, and competitive assessment) for enhancing their market share.

The report provides insights on the following pointers:

**Market Penetration:** Comprehensive information on dialysis products and services offered by the top 5 players in the dialysis market in emerging nations. The report analyzes the dialysis market by product, service, and region

**Market Development:** Comprehensive information about lucrative emerging markets. The report analyzes the markets for various hemodialysis and peritoneal dialysis products and services in emerging nations (India, Asia (excluding India), and MENA)

**Market Diversification:** Exhaustive information about new products, untapped geographies, recent developments, and investments in the dialysis market in emerging nations

**Competitive Assessment:** In-depth assessment of market shares, strategies, products, and recent developments of the leading players in the dialysis market in emerging nations

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