

Global and China Hemodialysis Industry Report, 2012-2013

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Abstracts

Hemodialysis is also regarded as artificial kidney, a kind of blood purification targeting mainly at the treatment of renal failure patients. In 2011, the global dialysis population hit 2.158 million, a year-on-year increase of 6.4%. And the growth rate is estimated to maintain around 6% in the upcoming years, with the targeted figure by 2020 soaring to roughly 3.8 million.

In 2011, the dialysis population concentrated in Europe, Americas and other developed regions. However, with the widening coverage of medical insurance in developing countries as well as increasing national income, the dialysis population in China, India, Brazil and other developing countries are on the rapid rise, with the growth rate more than 10%.

The global hemodialysis market consists of hemodialysis service and hemodialysis equipment. In particular, the hemodialysis service market embraces larger size, making up 85% or so.

In 2011, the global hemodialysis service market size approximated USD62.5 billion. In Europe, the hemodialysis service is widely offered by public institutions; while hemodialysis service market is dominated by privately-run organizations in the US and Japan. At present, companies offering hemodialysis service worldwide include Fresenius Medical Care, DaVita, etc, and both of Fresenius and DaVita have catered to roughly 370,000 patients all together in 2011.

Global hemodialysis equipment market characterizes high concentration, with European, American and Japanese enterprises as leading players. In 2011, the world's top 3 hemodialysis equipment producers covered Germany-based Fresenius Medical

Care, America-based Baxter International and Sweden-based Gambro. Among the three, Fresenius Medical Care is not only the world's largest manufacturer of hemodialysis equipment, but also the largest hemodialysis service provider catering to over 233,000 renal patients. In addition, Baxter International is the biggest peritoneal dialysis equipment maker in the world.

In 2012, there were approximately two million end-stage renal disease patients in China. However, since the medicare reimbursement ratio in China was relatively low, only 10% sufferers could afford to receive hemodialysis treatment. With the health insurance coverage widening in phases, the ratio is expected to see big surge in the future.

China is heavily reliant on the import of hemodialysis equipments, with the market occupancy of the imported from Fresenius Medical Care, Gambro and so forth approximating 75% in 2012. There is a small number of homegrown hemodialysis equipment producers in China. A few of hemodialysis machine makers include Guangzhou Jihua Medical Apparatus and Instruments, Chongqing Duotai and Chongqing Shanwaishan Science and Technology, while dialyzer producers comprise Shandong Weigao Group Medical Polymer Company Limited, Jiangsu Lengthen Life Science and Technology, etc.

Given the huge potential in Chinese hemodialysis market, several listed companies have tapped into the field, including Huaren Pharmaceutical Co., Ltd, Guangdong Biolight Meditech and Sichuan Kelun Pharmaceutical Co., Ltd. In particular, Huaren Pharmaceutical Co., Ltd introduced its peritoneal dialysis products in the market in a large scale in 2012Q3; Guangdong Biolight Meditech took over Tianjin Ever -Trust Medical Equipment Development to access into hemodialysis consumable field, and purchased Chongqing Duotai to gain blood dialysis machine & medical instrument registration certificate; and Sichuan Kelun Pharmaceutical Co., Ltd projected more capital to Chengdu Qingshan Likang Pharmaceutical and set foot in peritoneal dialysis field.

The report highlights the followings:

Global hemodialysis population and distribution;

current development, competition pattern and development tendency of global hemodialysis equipment and service market;

market scale, competitive landscape, import & export and development prediction of Chinese hemodialysis industry;

Global and China hemodialysis equipment market segments and competition pattern;

Operational analysis, hemodialysis business and development forecast of global and China's 17 industrial players.

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