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Research Report on Hemodialysis Industry in China, 2011-2020

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Abstracts

Description

Chronic kidney disease (CKD), namely chronic renal insufficiency or chronic renal failure, refers to chronic kidney structure and function disorder caused by various factors. According to GFR (Glomerular filtration rate) index, chronic kidney disease is divided into five stages. Once the CKD patients enter the fifth stage, namely end-stage renal disease (ESRD) commonly known as uremia, and the renal replacement therapy must be conducted.

Hemodialysis (HD) is one of the renal replacement therapy ways to treat acute or chronic renal failure patients. Presently, there are more than 2 million end-stage renal disease (ESRD) patients all over the world who choose the dialysis therapy, and about 90% of them receive hemodialysis. Because of the high hemodialysis expenses, the dialysis patients mainly concentrate in developed countries. ESRD patients on dialysis account for 10%-20% in developing countries, which is far lower than the 80% in developed countries. The population of dialysis patients is relatively small but fast-growing. In recent years, the annual growth rate of dialysis patients reached over 10% in China, India and Brazil, which was much higher compared to 3%-5% in developed countries.

With the increasing dialysis patients, the number of the global dialysis centers is correspondingly growing, of which the growth rate is consistent with that of dialysis patients. In 2015, the global dialysis centers were estimated to reach 38,000. On average, every dialysis center provided services to 70-80 patients. Based on the relatively high dialysis rate and the slow increase of dialysis patients, it is predicted that the new hemodialysis centers will be constructed in emerging markets of Asia-Pacific regions especially China. Presently, there are a large number of unsatisfied requirements, which will be the significant points of the future dialysis market.

Up to the end of 2015, China had the population of more than 1.37 billion, and ESRD patients surpassed 2 million. Unable to afford it, only a small proportion of end-stage renal disease patients can receive the dialysis therapy. There were 300,000 dialysis patients in China by the end of 2015. The overall dialysis treatment rate was estimated to reach 14%-15% in China, which was lower than the average global level of 38%-40%. It was far lower than the above 90% treatment rate in developed countries. Therefore, there were large development potentials in Chinese dialysis market.

With the improvement of Chinese medical care as well as the increasing income and payment ability of hemodialysis patients, the hemodialysis industry will develop rapidly in the future. Hemodialysis services mainly consist of dialyzers, dialysis consumables, dialysis drugs and labor services. Hemodialysis instruments include dialysis machines, dialyzers and dialysis pipelines. Dialyzers are core consumables with high technical barriers, which accounts for the largest market share. The market size in China exceeded CNY 5 billion while the domestic market share was approximately 30% in 2015. The market size of China's dialysis machines reached about CNY 3 billion in 2015, and the foreign capital brands accounted for 80% of the market share. The hemodialysis powder and fluid are important solvents in the process of hemodialysis. In spite of relatively low technical barriers, domestic enterprises account for over 90% of the market share thanks to the high transport cost (The reasonable transportation radius is no larger than 800 km) and policy barriers. In addition, the market competition is not fierce. Conventional hemodialysis medicines include EPO and heparin which are in general domestically produced. Service costs include costs of bed and health care labors.

Presently, the average hemodialysis expense is about 400-500 CNY for each treatment in China. The gross profit rate of hemodialysis business can universally reach 30-40% or higher. Charges in public hospitals are generally higher than those of private hospitals, of which the gross profits can reach above 50%. According to CRI, there were about 4,000 hemodialysis centers in China up to the end of 2015.

In 2015, the hemodialysis market size exceeded CNY 20 billion with an increase of more than 15% in recent years. The global ESRD patients receiving hemodialysis treatment are estimated to reach 4 million, and those in China will surpass 600,000 accounting for 15%. It is predicted that the overall market size of hemodialysis industry will increase to over CNY 50 billion by 2020.

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