

# **Hemodialysis Equipment Market Size and Forecast (2021 - 2031), Global and Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Product (Dialyzers, Dialysate, Access Products, and Others), End User (In-Center Dialysis Settings and Home Care Settings), and Geography (North America, Europe, Asia Pacific, Middle East and Africa, and South and Central America)**

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## **Abstracts**

The hemodialysis equipment market is projected to reach US\$ 24.11 billion by 2031 from US\$ 14.90 billion in 2024. The market is estimated to register a CAGR of 7.3% during 2025-2031. Major factors driving the market growth include the rising prevalence of chronic kidney disease and end-stage renal disease, growing demand for home healthcare settings, and favorable reimbursement policies are propelling the adoption of hemodialysis equipment. Further, expansion into underpenetrated markets will likely boost the market during the forecast period. However, high cost of equipment & consumables, need for specialized infrastructure & skilled staff, and patient non-compliance and accessibility issues are among the market deterrents.

Hemodialysis device manufacturers are presented with numerous lucrative growth opportunities as a result of an increase in the recognition of chronic kidney disease and end-stage renal disease (ESRD) as significant public health issues by governments worldwide. Several governments have responded to the problem with policy changes, increased reimbursements, and the initiation of public-private partnership models, increasing in-center opportunities for hemodialysis device manufacturers. A 2024 survey by the International Society of Nephrology, covering 167 countries, reveals that

in-center hemodialysis is available in 98% of countries worldwide; however, the prevalence and access to this treatment differ significantly based on income levels. To illustrate, affluent countries have ~9.3 HD centers per million people, and ~0.3 per million in poor countries. In many of these countries, the state finances HD services either fully or partially. Specifically, 45% of the countries confirmed that in-center HD is publicly funded at no cost to the patient in some form, while 23% have mixed public-private funding models.

A few countries are actively using PPPs to overcome their shortcomings in infrastructure, investment, and operational capacity. For example, through an IFC-supported tender, Uzbekistan kick-started a PPP at the beginning of 2021 to take care of the designing, financing, equipping, and operational management of four dialysis clinics; the project is anticipated to be free for the patients' side for ~1,100 patients annually, while attracting approximately US\$ 12.9 million in private investment. These models in emerging markets facilitate the rapid expansion of clinics in underserved areas, as governments leverage the private sector's efficiency, technology, and financing to achieve their goals, while ensuring affordability and regulatory oversight.

Manufacturers and innovators of hemodialysis equipment stand to gain considerably from this conjunction of policy support and PPP-led scale-ups, as it predicts a steady rise in demand, the emergence of new government and NGO partnership opportunities, and the chance to refine the equipment for various settings in terms of cost, longevity, and operational simplicity. Those companies that manage to comply with regulatory requirements, offer products with a low total cost of ownership, have service/maintenance networks in place, and are open about their bidding processes, are in a particularly advantageous position to profit from this trend.

The comparative company analysis evaluates and categorizes the Hemodialysis equipment market based on product portfolio (product satisfaction, product features, and availability), recent market developments (merger & acquisition, new product launch & enhancement, investment & funding, award, agreement, collaboration, & partnership, recognition, and expansion), and geographic presence that aids better decision-making and understanding of the competitive landscape. The report profoundly explores the recent significant developments and innovations by the leading vendors in the global Hemodialysis equipment market. The key market players are Asahi Kasei Corp, Fresenius Medical Care AG & Co KGaA, Baxter International Inc, B. Braun Melsungen AG, Medtronic Plc, Nipro Corp, Nikkiso Co Ltd, BD, Dialife SA, Outset Medical Inc.

In terms of product, the hemodialysis equipment market is bifurcated into dialyzers, dialysate, access products, and others. The dialyzers segment held a larger market share in 2024, owing to rising incidence of chronic kidney disease (CKD), the increasing demand for hemodialysis procedures, and ongoing advancements in dialyzer technology that is leading the hemodialysis equipment market.

Based on end user, the Hemodialysis equipment market is categorized into in-center dialysis settings home care settings. The in-center dialysis settings segment held a larger share of the market in 2024. In-center hemodialysis facilities remain crucial in the global renal care landscape, particularly in regions where home dialysis programs are underdeveloped. Such places offer patients the supervision and assistance of professionals, thus ensuring the proper technique and minimizing the risk of complications.

Companies operating in the hemodialysis equipment market adopt various organic and inorganic strategies. The organic strategies mainly include product launches and product approvals. Inorganic growth strategies witnessed in the market are acquisitions, collaborations, and partnerships. These growth strategies allow the market players to expand their businesses, enhance their geographic presence, and contribute to the overall market growth. Furthermore, acquisitions and partnerships helped strengthen their customer base and extend their product portfolios. A few significant developments by key hemodialysis equipment market players are listed below.

In September 2024, Nipro Corp. consolidated its presence in Morocco. Its subsidiary, based in Casablanca since 2020, has succeeded in accelerating its market deployment dynamic with the establishment of a logistics platform in line with international standards, designed to supply Nipro Medical solutions with its complete renal range for water treatment rooms and dialysis generators.

In July 2024, Japan's Nipro Medical invested \$ 398M to establish NC medical device manufacturing facility, to meet demand from the North American pharmaceutical and dialysis markets.

In August 2023, Fresenius Medical Care, announced the U.S. Food and Drug Administration (FDA) 510(k) clearance for VersiHD with GuideMe Software, a completely reinvented self-guided interface for the company's VersiHD chronic home hemodialysis (HHD) system. VersiHD with GuideMe Software aims to transform the experience of HHD for patients and nurses.

## Reason to buy

Save and reduce time carrying out entry-level research by identifying the growth, size, leading players and segments in the global Hemodialysis Equipment market.

Highlights key business priorities in order to assist companies to realign their business strategies

The key findings and recommendations highlight crucial progressive industry trends in the global Hemodialysis Equipment market, thereby allowing players across the value chain to develop effective long-term strategies

Develop/modify business expansion plans by using substantial growth offering developed and emerging markets

Scrutinize in-depth global Hemodialysis Equipment market trends and outlook coupled with the factors driving the market, as well as those hindering it.

Enhance the decision-making process by understanding the strategies that underpin commercial interest with respect to client products, segmentation, pricing and distribution

## The List of Companies - Hemodialysis Equipment Market

Asahi Kasei Corp

Fresenius Medical Care AG & Co KGaA

Baxter International Inc

B. Braun Melsungen AG

Medtronic Plc

Nipro Corp

Nikkiso Co Ltd

BD

Dialife SA

Outset Medical Inc

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