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Global Dialysis Market Report: 2012 Edition

https://marketpublishers.com/r/G8DCC96518BEN.html
Date: August 2012
Pages: 48
Price: US$ 800.00 (Single User License)
ID: G8DCC96518BEN

Abstracts

With the fast pace evolution of technology, economy, lifestyle and every other aspect of the surrounding environment, the most affected part of our lives is the health and the vital organs of body are the ones who bear the brunt. Uncertain lifestyle, bad eating habits are few such factors which are giving rise to numerous health related issues like diabetes, obesity, hypertension etc. All these underlying conditions in turn put key organs like heart and kidneys at risk.

The slow progression in the kidney functioning (reduced GFR) is termed as Chronic kidney disease (CKD). As per the severity of the disease, CKD is bifurcated in 5 stages, the fifth being the most severe, in which the complete impairment of kidneys/total loss of kidney function takes place. This stage is known as End Stage Renal Disease (ESRD). Since ESRD is a progressive and irreversible condition, only two options are there for its treatment - kidney transplantation and dialysis.

Dialysis is the process of blood purification i.e the removal of waste and toxic substances from the body and can be done via two procedures viz. peritoneal dialysis (PD) or hemodialysis (HD). The major dialysis products include dialyzers, hemodialysis machines, dialysis concentrates and peritoneal dialysis products. Dialysis services refer to the treatments given by the specialized physicians and care persons to the patients.

The key trends as of now witnessed by the dialysis industry include introduction of bundled reimbursement model, preference for peritoneal dialysis over hemodialysis, inclination towards nocturnal dialysis etc. Furthermore, some of the major factors driving the market growth are growing number of diabetic patients worldwide, expanding obese population, increasing cases of hypertension, growing adult population worldwide, illicit consumption of non-prescription drugs, and increasing expenditure on healthcare. These reasons are anticipated to boost the market growth strongly in the near future. Although there are no acute challenges faced by the industry but the treatment

procedure itself have certain associated risks such as bleeding at the access point, hypotension, infections, anemia development and the high cost of the complete procedure have been creating some hindrances in the acceptance of the treatment procedure.

At present, North America is the largest market for dialysis, followed by Asia Pacific, but over the next couple of years, the dialysis market is expected to be driven by emerging markets of the Asia Pacific region, including China and India, and therefore leading to an increase in the share of this region in the global dialysis market.

From the operational aspect, global dialysis market is fiercely competitive with three major players accounting for a significant market share. As of 2011, Fresenius Medical Care dominated the global dialysis market in terms of both products and services but in case peritoneal dialysis market share, Baxter was the in the lead position.

The current report presents the global dialysis market on both global and regional basis. The report also describes the trends prevailing in the dialysis industry as well as the growth drivers for the industry. The key issues being faced by the industry, including the cost structure and the risks associated with dialysis are also discussed. Along with describing the whole competitive scenario in the global as well as regional dialysis markets, the report also profiles the three largest players in the industry, Fresenius Medical Care, Baxter International and DaVita Inc.

By combining SPSS Inc.'s data integration and analysis capabilities with our relevant findings, we have predicted the future growth of the industry. We employed various significant variables that have an impact on this industry and created regression models with SPSS Base to determine the future direction of the industry. Before deploying the regression model, the relationship between several independent or predictor variables and the dependent variable was analyzed using standard SPSS output, including charts, tables and tests.

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