Kidney Dialysis Centers

Description: Brief Excerpt from Industry Overview Chapter:

Companies in this industry provide outpatient kidney dialysis services. Major companies include US-based DaVita, Dialysis Clinic (DCI), and US Renal Care, and Germany-based Fresenius Medical Care and B Braun Melsungen.

The global dialysis services market generates annual revenue of about $63 billion, according to Fresenius. Nearly 3 million people worldwide receive dialysis treatment. Asia has the most dialysis patients. Demand for kidney dialysis services is growing in emerging economies where access to care has been historically insufficient. Countries with the highest growth include Thailand, Bangladesh, Russia, the Philippines, and Malaysia, according to the US Renal Data System.

The US kidney dialysis industry includes about 6,100 centers with combined annual revenue of about $19 billion.

Kidney dialysis is an ambulatory care service, which is covered further in a separate industry profile.

Competitive Landscape

Demand depends on the number of people who suffer from kidney disease. The profitability of individual companies is linked to efficient operations and good marketing. Large companies have economies of scale in administrative costs, which has driven consolidation in the industry. Small operators can compete successfully if they have centers in desirable locations or good relations with doctors who refer patients. The US industry is highly concentrated: the four largest companies operate more than 75% of all centers.

More than 660,000 people in the US receive treatment for end-stage renal disease (ESRD), and about 440,000 of them receive treatment in dialysis centers.
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