China Hemodialysis Industry Research Report 2015

Description: Counting by theoretic morbidity, currently there are nearly 2000 thousand people in China with terminal nephropathy. If all these patients receive dialysis treatment, the market size of dialysis in China will exceed RMB 100 billion on a cost per patient of RMB 75.1 thousand presently. But actually currently only 15% of these patients received dialysis treatment, where the capacity of the market is still so huge.

In March 2014, the NHFPC of China released the ‘Ask for comment on management practices and fundamental standards of hemodialysis centers’, which contains obviously policy support in three aspects. First, second-class or above hospitals will never be a must in the building of a hemodialysis center. Second, other departments of an independent hemodialysis center can be outsourced. Lastly, senior doctors of nephrology can multi-sited licensed.

Due to the strong support on policy from national and local governments, many domestic and foreign enterprises planned or has entered Chinese market even the competition is relatively intense.

The growth rate of hemodialysis machine and dialyzer reached 25%~30% from 2011 to 2014 relatively, which dominated by foreign brands. Seven European and Japanese brands accounts for nearly 80% of the Chinese hemodialysis machine market in 2014. On the other hand, currently there are eight domestic dialyzer manufacturers, but their market share is lower than 30%.

In August 2014, Medtronic invested $70 million in Chengdu to build the first global portable hemodialysis plant, which will dramatically reduce costs. It is planned to operate in 2016. In addition, Baxter has planned to invest another RMB 600 ~ 650 million to build up a peritoneal dialysis solution plant.

Bluesail, the largest PVC glove manufacturer in China, announced in 2014 that it will invest RMB 72.24 million to build an extracorporeal circulation tubes and hemopurificaiton equipment plant with total capacity of 20 million units per year.

Xinhua Medical Instrument planned to build up 20 and 30 hemodialysis centers in 2015 and 2016 relatively. In 2020, the total revenue of the company’s hemodialysis business will reach RMB 1 billion including equipment, consumables and hemodialysis centers.

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