Continuous Renal Replacement Therapy (CRRT) Market by Products (System, Disposables (Hemofilters & Bloodlines), & Dialysate/Replacement Fluids), Modality (SCUF, CVVH, CVVHD, CVVHDF) and Geography - Regional Adoption and Global Forecasts to 2020

Description: The global CRRT market is estimated to grow at a CAGR of 7.2% from 2015 to 2020. Although mature markets such as the U.S., Germany, and the U.K. held larger shares in the CRRT market in 2015, Asia-Pacific is poised to grow at the highest CAGR of 8.7% in the next five years. Factors such as increasing aging population, rise in sepsis cases, growing focus of multinational companies on emerging markets, improvements in and the modernization of healthcare infrastructure, and high incidences of AKI cases in this region are propelling the growth of this market.

The overall growth of the CRRT market is driven by factors such as the rising prevalence of AKI, increasing prevalence of sepsis, growing number of ICU patients, rapid rise in aging population, clinical advantages of CRRT over intermittent blood purification techniques, and the preference for CRRT (it is held as a gold standard for the treatment of hemodynamically unstable patients). However, factors such as high complexity of therapy, high procedural cost of CRRT, stringent regulatory guidelines for CRRT in North America, and the dearth of trained ICU nurses are restraining the growth of this market. Moreover, emerging markets (such as China, India, Brazil, and Mexico); broadening application horizons of CRRT, ongoing researches to establish the safety and efficacy profile of CRRT, and the development of a CRRT system for pediatric patients are creating opportunities for the players involved in the market.

In this report, the global CRRT market has been segmented on the basis of product [CRRT systems, CRRT disposables (hemofilters, bloodlines, and other disposables), and dialysate and replacement fluids] and modality [slow continuous ultrafiltration (SCUF), continuous venovenous hemofiltration (CVVH), continuous venovenous hemodialysis (CVVHD), and continuous venovenous hemodiafiltration (CVVHDF)].

Geographically, Europe (comprising Germany, France, the U.K., and Rest of Europe) commanded the largest share of 41% of the global CRRT market in 2015, followed by North America. The European CRRT market is primarily driven by various factors such as the increasing cases of AKI in this region and rising aging population, approvals for CRRT machines and anti-coagulating agents in Europe for multiple applications, high utilization rate of CRRT products in Europe, prescription of CRRT products by intensivists in Europe, and research studies and controlled clinical trials to obtain efficacy and safety profile of CRRT products. However, the inconsistent reimbursement scenario for CRRT procedure across European countries is one of the major factors restraining the growth of the CRRT market in this region.

The global CRRT market is highly consolidated in nature. Baxter International Inc. (U.S.) dominated the global CRRT market, with a share of ~55% in 2014, followed by Fresenius Medical Care AG & Co. KGaA (Germany). Other players include Asahi Kasei Medical Co., Ltd. (Japan), B. Braun Melsungen AG (Germany), Bellco S.r.l. (Italy), Infomed SA (Switzerland), Medica S.p.A (Italy), Medical Components, Inc. (U.S.), Nikkiso Co., Ltd (Japan), NxStage Medical, Inc. (U.S.), and Toray Medical Company Limited (Japan). Product approvals, launches, and enhancements; acquisition; and geographical expansion are the major strategies adopted by market players to achieve growth in the CRRT market.

Reasons to Buy the Report:

From an insight perspective, this research report focuses on various levels of analysis such as industry analysis (industry trends and Porter’s five forces model), market share analysis of top ten players, and company profiles, which together comprise and discuss basic views on the competitive landscape, emerging and high-growth segments of the CRRT market, high-growth regions and countries and their respective drivers, restraints, challenges, and opportunities.

The report will enable both established firms as well as new entrants/smaller firms to gauge the pulse of the market, which, in turn, will help them garner a greater market share. Firms purchasing the report could use one or a combination of the below-mentioned five strategies (market penetration, product development/innovation, market development, market diversification, and competitive assessment) for
strengthening their market shares.

The report provides insights on the following pointers:

- Market Penetration: Comprehensive information on CRRT products offered by the top 10 players in the CRRT market. The report analyzes the CRRT market by product and modality across geographies.
- Product Development/Innovation: Detailed insights on upcoming technologies, research and development activities, and new product launches in the CRRT market.
- Market Development: Comprehensive information about lucrative emerging markets. The report analyzes the markets for CRRT products across geographies.
- Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the CRRT market.
- Competitive Assessment: In-depth assessment of market shares, strategies, products, distribution networks, and manufacturing capabilities of the leading players in the CRRT market.

Contents:
1 Introduction
  1.1 Objectives of the Study
  1.2 Market Definition
  1.3 Market Scope
  1.3.1 Markets Covered
  1.3.2 Years Considered for the Study
  1.4 Currency
  1.5 Limitations
  1.6 Stakeholders

2 Research Methodology
  2.1 Research Methodology Steps
  2.2 Secondary and Primary Research Methodology
  2.2.1 Secondary Research
  2.2.1.1 Key Data from Secondary Sources
  2.2.2 Primary Research
  2.2.2.1 Key Data from Primary Sources
  2.2.2.2 Key Industry Insights
  2.3 Market Size Estimation Methodology
  2.4 Market Data Validation and Triangulation
  2.5 Assumptions for the Study

3 Executive Summary

4 Premium Insights
  4.1 Market Potential
  4.2 Market Opportunity
  4.3 CRRT Market, by Product and Modality (2015 vs. 2020)
  4.4 CRRT Market, by Modality (2015)
  4.5 CRRT Market, by Country (2015 vs. 2020)

5 Market Overview
  5.1 Introduction
  5.2 Market Segmentation
  5.2.1 By Product
  5.2.2 By Modality
  5.3 Market Dynamics
  5.3.1 Drivers
  5.3.1.1 Increasing prevalence of AKI
  5.3.1.2 Rising adoption of CRRT for the treatment of renal disorders
  5.3.1.3 Growing number of ICU patients
  5.3.1.4 Rapid rise in aging population
  5.3.1.5 Clinical advantages of CRRT over intermittent blood purification techniques
  5.3.1.6 CRRT is a gold standard for treatment of hemodynamically unstable patients
  5.3.1.7 Technological advancements and new product launches
  5.3.1.8 Increasing prevalence of sepsis
  5.3.2 Restraints
5.3.2.1 High complexity of therapy
5.3.2.1.1 Lack of standard treatment guidelines
5.3.2.1.2 Complications associated with CRRT
5.3.2.2 High procedural cost of CRRT
5.3.2.3 Stringent regulatory guidelines for CRRT in North America
5.3.2.4 Dearth of trained ICU nurses
5.3.3 Opportunities
5.3.3.1 Emerging markets
5.3.3.2 Broadening application horizon of CRRT
5.3.3.2.1 Evolution of CRRT from simple renal replacement treatment to a multi-organ support therapy (MOST)
5.3.3.2.2 CRRT: Progression from adaptive renal devices to multipurpose treatment machines
5.3.3.3 Ongoing researches to establish safety and efficacy profile of CRRT
5.3.3.4 Development of a CRRT system for pediatric patients
5.3.3.4.1 the CARPEDIEM project
5.3.3.5 Untapped market growth opportunities in North America
5.3.4 Challenges
5.3.4.1 Poor reimbursement scenario in developing countries
5.3.4.2 Lack of substantial clinical evidences supporting efficacy of CRRT
5.3.4.3 Currently approved CRRT technology is inadequate for children
5.3.4.4 Lack of awareness about the benefits of CRRT
5.3.5 Winning Imperatives
5.3.5.1 Selling machines along with disposables to end users.
5.3.5.2 High bargaining margins on disposables as well as machines
5.3.5.3 Development of CRRT machine that is only compatible with respective company's disposables
5.3.5.4 Core competency of players
5.3.6 Industry Trends
5.3.6.1 Training programs for the operation of CRRT devices
5.3.6.2 Rising adoption of user-friendly CRRT machines

6 Industry Insights
6.1 Introduction
6.2 Reimbursement Scenario
6.2.1 North America
6.2.2 Europe
6.2.3 Asia-Pacific (Excluding Japan)
6.2.4 Japan
6.2.5 Rest of the World
6.3 Regulatory Landscape
6.3.1 North America
6.3.2 Europe
6.3.3 Asia-Pacific
6.3.4 Rest of the World
6.4 Porter'S Five Forces Analysis
6.4.1 Competitive Intensity
6.4.2 Bargaining Power of Buyers
6.4.3 Bargaining Power of Suppliers
6.4.4 Threat of Substitutes
6.4.5 Threat of New Entrants
6.5 Pricing and Cost Analysis
6.6 Strategic Recommendations
6.6.1 Design Recommendations for CRRT Machines
6.6.2 Key Strategies for Players Seeking to Enter the CRRT Market

7 Adoption of CRRT, by Region
7.1 Introduction
7.2 Utilization of CRRT Procedures, by Region
7.3 Number of CRRT Patients, by Region

8 CRRT Market, by Product
8.1 Introduction
8.1.1 Dialysate and Replacement Fluids
8.1.2 CRRT Disposables
8.1.2.1 Hemofilters
8.1.2.2 Bloodline Sets (Tubing Sets)
8.1.2.3 Other Disposables
8.1.3 CRRT Systems

9 CRRT Market, by Modality
9.1 Introduction
9.2 Continuous Venovenous Hemofiltration (CVVH)
9.3 Continuous Venovenous Hemodiafiltration (CVVHDF)
9.4 Continuous Venovenous Hemodialysis (CVVHD)
9.5 Slow-Continuous Ultrafiltration (SCUF)

10 CRRT Market, by Region
10.1 Introduction
10.2 CRRT Market, by Region
10.2.1 Europe
10.2.1.1 CRRT machines approved for multiple applications
10.2.1.2 Intensivists' preference for CRRT for AKI treatment
10.2.1.3 Players focus on leveraging growth opportunities in Europe
10.2.1.4 Germany
10.2.1.4.1 Rising focus of players on the German CRRT market
10.2.1.5 U.K.
10.2.1.5.1 Rising awareness about AKI in U.K.
10.2.1.6 France
10.2.1.6.1 Symposia and conferences
10.2.1.7 Rest of Europe
10.2.1.7.1 Clinical research and trials driving market growth in ROE
10.2.2 North America
10.2.2.1 North American utilization of CRRT lower than that of Europe, Australia, and Japan
10.2.2.2 Regulatory policies, a key hindrance to market growth
10.2.2.3 U.S.
10.2.2.3.1 Prevalence of AKI, ESRD rising due to growth in aging population
10.2.2.3.2 Technological advancement to boost demand for CRRT products
10.2.2.3.3 Ongoing clinical trials to prove safety and efficacy of CRRT products
10.2.2.3.4 Government funding & grants to develop cost-effective treatments for AKI patients
10.2.2.3.5 Shortage of registered nurses in ICU settings
10.2.2.4 Canada
10.2.2.4.1 Rising AKI prevalence
10.2.2.4.2 Barriers to enter the Canadian CRRT market
10.2.2.4.3 High costs of CRRT as compared to IHD
10.2.3 Asia-Pacific
10.2.3.1 High use of CRRT in Australia and Japan
10.2.3.2 Studies and clinical trials to establish the safety and efficacy profile of CRRT
10.2.3.3 Dearth of reimbursement and technical expertise
10.2.3.4 Japan
10.2.3.4.1 Japan focusing on the use of CRRT for non-renal indications
10.2.3.4.2 Large number of domestic manufacturers - a barrier to the entry of major players
10.2.3.5 China
10.2.3.5.1 Rising incidence of AKI and ESRD in the China
10.2.3.6 India
10.2.3.7 Rest of Asia-Pacific
10.2.3.7.1 High utilization of CRRT in Australia
10.2.4 Rest of the World (ROW)
10.2.4.1 South Africa
10.2.4.2 Latin America and the Middle East

11 Competitive Intelligence Analysis
11.1 Competitive Intensity
11.1.1 Evaluation Parameters and Scores
11.1.2 Scoring Methodology
11.1.3 Competitive Intensity Score, by Company
11.1.3.1 Baxter International Inc.
11.1.3.2 NxStage Medical, Inc.
11.1.3.3 B. Braun Melsungen AG
11.1.3.4 Fresenius Medical Care AG & Co. KGaA
11.1.4 Competitive Intensity - Mapping of Baxter, Nxstage, B.Braun, and Fresenius
11.1.5 Market Share Analysis
11.1.5.1 Baxter International Inc.
11.1.5.2 Fresenius Medical Care AG & Co. KGaA
11.1.5.3 NxStage Medical, Inc.
11.2 Competitive Situation and Trends
11.2.1 Product Approvals, Launches, and Enhancements
11.2.2 Expansions
11.2.3 Acquisitions
11.2.4 Agreements, Partnerships, and Collaborations

12 Company Profiles
(Business Overview, Products & Services, Key Insights, Recent Developments, SWOT Analysis, MnM View)*
12.1 Introduction
12.2 Baxter International Inc.
12.3 Fresenius Medical Care AG & Co. KGaA
12.4 Nikkiso Co., Ltd.
12.5 B. Braun Melsungen AG
12.6 Nxstage Medical, Inc.
12.7 Asahi Kasei Medical Co., Ltd. (A Subsidiary of Asahi Kasei Corporation)
12.8 Belco S.R.L.
12.9 Infomed SA
12.10 Medica S.P.A
12.11 Medical Components, Inc.
12.12 Toray Medical Company Limited

*Details on Business Overview, Products & Services, Key Insights, Recent Developments, SWOT Analysis, MnM View might not be captured in case of unlisted companies.

13 Appendix
13.1 Insights of Industry Experts
13.2 Discussion Guide
13.3 Introducing RT: Real-Time Market Intelligence
13.4 Available Customizations
13.5 Related Reports

List of Tables: (76 Tables)
Table 1 Use of CRRT as A Gold Standard for Treatment of Hemodynamically Unstable Patients is Driving Market Growth
Table 2 High Procedural Cost of CRRT Restraining the Market Growth
Table 3 Evolution of CRRT From Simple Renal Replacement Treatment to Multipurpose Therapy Unfolds New Growth Opportunities
Table 4 Lack of Substantial Clinical Evidences Supporting Efficacy of CRRT Poses A Key Challenge for the Market
Table 5 Average Selling Price (Asp) of CRRT Machines, By Manufacturer, 2014
Table 6 Average Selling Price of CRRT Bloodlines and Dialysate Bags, 2014
Table 7 Continuous Renal Replacement Therapy Market Size, By Product, 2013-2020 (USD Million)
Table 8 Continuous Renal Replacement Therapy Dialysate & Replacement Fluids Market Size, By Region, 2013-2020 (USD Million)
Table 9 Europe: CRRT Dialysate & Replacement Fluids Market Size, By Country, 2013-2020 (USD Million)
Table 10 North America: CRRT Dialysate & Replacement Fluids Market Size, By Country, 2013-2020 (USD Million)
Table 11 Asia-Pacific: CRRT Dialysate & Replacement Fluids Market Size, By Country, 2013-2020 (USD Million)
Table 12 Continuous Renal Replacement Therapy Market Size, By Disposables, 2013-2020 (USD Million)
Table 13 CRRT Disposables Market Size, By Region, 2013-2020 (USD Million)
Table 14 Europe: CRRT Disposables Market Size, By Country, 2013-2020 (USD Million)
Table 15 North America: CRRT Disposables Market Size, By Country, 2013-2020 (USD Million)
Table 16 Asia-Pacific: CRRT Disposables Market Size, By Country, 2013-2020 (USD Million)
Table 17 CRRT Systems Market Size, By Region, 2013-2020 (USD Million)
Table 18 Europe: CRRT Systems Market Size, By Country, 2013-2020 (USD Million)
Table 19 North America: CRRT Systems Market Size, By Country, 2013-2020 (USD Million)
Table 20 Asia-Pacific: CRRT Systems Market Size, By Country, 2013-2020 (USD Million)
Figure 56 Comparison of Competitive Intensity Scores: Baxter, Nxstage, B. Braun, and Fresenius
Figure 57 Relative Positioning of Companies Based on Competitive Intensity Score and CRRT Focus
Figure 58 Global CRRT Products Market Share Analysis, By Key Player, 2014
Figure 59 Geographical Presence of Key Players in Continuous Renal Replacement Therapy Market, 2014
Figure 60 Baxter International Inc.: Company Snapshot
Figure 61 Fresenius Medical Care AG & Co. KGAA: Company Snapshot
Figure 62 Nikkiso Co., Ltd.: Company Snapshot
Figure 63 B. Braun Melsungen AG: Company Snapshot
Figure 64 Nxstage Medical, Inc.: Company Snapshot
Figure 65 Asahi Kasei Corporation: Company Snapshot
Figure 66 Toray Group: Company Snapshot

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