Hemodialysis & Peritoneal Dialysis Market Products, Modality (Nocturnal, APD, & CAPD), End-users - Global Forecast to 2020

Description: 

"Hemodialysis & Peritoneal Dialysis Market Products (Machine, Dialyzer, Bloodlines, Concentrates, Catheters, Transfer Sets, Water Treatment Systems, & Services), Modality (Nocturnal, APD, & CAPD), End-users (In-center & Home) - Global Forecast to 2020"

The global dialysis market is poised to reach USD 93.83 billion by 2020, growing at a CAGR of 6.2% during the forecast period. Although the global dialysis market is estimated to grow at a lower CAGR in developed countries; however, it is expected to witness high growth in emerging countries such as China, India, and Brazil. Factors such as the rising number of ESRD patients across the globe, increasing prevalence of diabetes and hypertension, growth in aging population, low patient preference towards kidney transplantation, and technological advancements are propelling the growth of the dialysis market. However, factors such as the decrease in Medicare reimbursements, pricing pressures, low awareness about kidney diseases and renal treatment modalities, product recalls, and reuse of hemodialysis consumables are restraining the growth of this market.

In this report, the global dialysis market has been segmented on the basis of category (hemodialysis and peritoneal dialysis) and end-users (in-center dialysis and home dialysis). Based on modality, the hemodialysis segment is further categorized into, conventional hemodialysis, short daily hemodialysis, and nocturnal hemodialysis; whereas the peritoneal dialysis segment comprises continuous ambulatory peritoneal dialysis (CAPD) and ambulatory peritoneal dialysis (APD).

The hemodialysis market holds the largest share of 86.8% of the global dialysis market in 2015 and is poised to grow at a CAGR of 6.0% in the forecast period. Factors such as the huge acceptance of hemodialysis therapy over peritoneal dialysis among CKD and ESRD patients, increasing number of ESRD patients, growth in the number of dialysis centers, and government initiatives are stimulating the growth of the hemodialysis market. However, the peritoneal dialysis market is estimated to grow at a high CAGR of 7.8% from 2015 to 2020.

Geographically, North America commands the largest share of 36.9% the global dialysis market in 2015, followed by Asia-Pacific. A number of factors such as the high number of dialysis centers, rapid adoption rate of advanced technologies, increasing prevalence of diabetes and hypertension, structured reimbursement system, and availability of skilled nephrologists and well equipped dialysis centers/hospitals are driving the growth of the dialysis market in North America; however, reduction in the reimbursement rate and low utilization of home dialysis are hampering the growth of the dialysis market in this region. The Asia-Pacific region is poised to grow at the highest CAGR of 9.7% of the global dialysis market in the next five years. Factors such as the presence of a large patient population base, increasing number of private and public owned dialysis centers, improving reimbursement and insurance scenario, rising focus of global players, and increasing government initiatives are propelling the growth of the dialysis market in the Asia-Pacific region.

The global dialysis market is highly competitive, with a large number of players (including dialysis products market players and dialysis services market players). As of 2014, the global dialysis products market was dominated by Fresenius Medical Care AG & Co. KGaA (Germany) and Baxter International, Inc. (U.S.), which together accounted for ~63% of the market; whereas in the global dialysis services market, Fresenius Medical Care AG & Co. KGaA (Germany), DaVita Healthcare Partners, Inc. (U.S.), and Diaverum Deutschland GmbH (Germany) were the top three market players. Partnerships/agreements/collaborations/joint-ventures, and acquisitions are the major strategies adopted by most of the market players, to achieve growth in the dialysis market.

Reasons to Buy the Report:

From an insight perspective, this research report has focused on various levels of analysis - industry analysis (porter's five force model), market share analysis of top players, and company profiles, which together comprise and discuss the basic views on the competitive landscape, emerging and high growth segments of the dialysis market, high growth regions and countries and their respective regulatory policies, government
initiatives, drivers, restraints, and opportunities. The above mentioned market research data, current market size, and forecast of future trends will help existing players and new entrants to make the necessary decisions regarding the product offerings, geographic focus, change in strategic approach, R&D investment for innovation in products and technologies, and levels of output in order to remain successful.

Firms purchasing the report could use any one or combination of the below mentioned five strategies (Market Penetration, Product Development/Innovation, Market Development, Market Diversification, and Competitive Assessment) for reaping market share.

The report provides insights on the following pointers:

- Market Penetration: Comprehensive information on dialysis products and services offered by the top 10 players in the global dialysis market. The report analyzes the dialysis market by product, service, modality, and region.

- Market Development: Comprehensive information about lucrative emerging markets. The report analyzes the markets for various dialysis products and services across key geographic regions.

- Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the global dialysis market.

- Competitive Assessment: In-depth assessment of market shares, strategies, products, and recent developments of the leading players in the global dialysis market.

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