Chronic Kidney Disease Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The chronic kidney disease market is expected to register a CAGR of 6.6% during the forecast period.

COVID-19 has impacted the growth of the chronic kidney disease market. The lockdown measures imposed by the government to avoid the spread of coronavirus among the population resulted in the shutting down of patient visits in hospitals, clinics, and dialysis centers which has impacted the lives of patients suffering from chronic kidney diseases. For instance, from an article published in Frontiers in Physiology in July 2021, it has been observed that the diagnosis of various kidney diseases was delayed during the COVID-19 pandemic as non-urgent tests and visits were postponed due to the closure of medical services during the lockdown. This has affected the histological examination for kidney diagnosis and hence impacted the demand for diagnostic tests and equipment during the pandemic.

Also, an article published in Kidney International in October 2020 stated that in India, a survey was conducted in 19 hospitals which showed that 2404 patients were admitted for regular dialysis after the lockdown as compared to 2517 patients before the lockdown. Thus, the decreased ability of the hospitals to provide lifesaving in-center hemodialysis has reduced the number of dialysis sessions per week which has affected the demand for dialysis equipment and medications. This has impacted the market growth. However, with released restrictions, resumed diagnosis and dialysis services, and increased patient visits, the studied market is expected to grow over the forecast period.

Factors such as increasing incidences of chronic kidney disease, technological advancements in diagnostic tests for kidney diseases, and the increasing need for early detection are promoting the market growth. The rising burden of chronic kidney diseases among the population is a key factor driving the market growth. For instance, as per the data published by the Australian Institute of Health and Welfare, in August 2022, about 17,700 deaths from chronic kidney diseases were reported in Australia, in

2020. In addition, as per the same source, 76% of these deaths had CKD reported as an associated cause of death. This is expected to increase the demand for effective diagnosis and treatment drugs, hence propelling market growth.

Additionally, as per the data published by the Australian Institute of Health and Welfare, in August 2022, it has been observed that in Aboriginal and Torres Strait Islanders 292 males and 677 females per 100,000 population, have chronic kidney diseases in 2021, respectively. As per the same source, Indigenous Australians were 4.6 times more likely to be diagnosed with chronic kidney disease as compared to their non-Indigenous counterparts. Thus, the rising burden of kidney disease among the population is expected to increase the demand for effective drugs and treatment options, propelling market growth.

Furthermore, emerging technologically advanced products and diagnostics tests to early detect chronic kidney disease among the population as well as rising government initiatives towards CKD are also expected to increase the market growth. For instance, in March 2022, Nova Biomedical launched a new tool, Nova Max Pro Creatinine/eGFR Meter System, to improve kidney care through kidney function screening and early detection of kidney disease in point-of-care settings outside the hospital. The system offers a simplified meter and creatinine biosensor to measure blood creatinine and calculates the estimated glomerular filtration rate (eGFR) from a tiny 1.2 microliter capillary fingerstick blood sample in just 30 seconds. Also, in February 2021, the National Kidney Foundation (NKF) launched the first-ever national registry for patients at all stages of kidney disease, the National Patient Network in the United States. It improves the lives of people with kidney disease by better informing research, clinical care, drug development, and health policy decisions, as well as giving kidney patients the tools they need to stay educated and healthy.

Moreover, the rising company activities in developing drugs and increasing product launches are also contributing to the market growth over the forecast period. For instance, in March 2022, Lupin launched Sevelamer Hydrochloride tablets used to treat hyperphosphatemia in patients with CKD in the United States market. Also, in March 2022, the DCGI approved Zydus Lifesciences for its NDA for Oxemia, a first-of-its-kind oral treatment in India for anemia associated with chronic kidney disease (CKD).

However, the use of generic products in some countries is likely to hinder the growth of the chronic kidney disease market over the forecast period.

Chronic Kidney Disease Market Trends

Blood Test Diagnosis Segment Expected to Witness High Growth over the Forecast Period

The blood tests segment is expected to witness significant growth in the chronic kidney disease market over the forecast period owing to factors such as the rising burden of chronic kidney disease and expanding technologically advanced diagnostic products.

Several types of blood tests help detect chronic kidney diseases, such as blood urea nitrogen (BUN) tests that measure the amount of urea nitrogen, a waste product, in the blood, serum creatinine test, and estimated glomerular filtration rate (eGFR) test. The demand for these tests is expected to increase due to rising awareness about kidney health.

In addition, the rising geriatric population, which is more prone to develop chronic kidney diseases, is also contributing to the demand for blood tests, boosting the segment's growth. For instance, as per 2022 statistics published by CDC, the prevalence of CKD is higher in people aged 65 years or older than in people aged between 45-64 years or 18-44 years. Also, according to the 2022 statistics published by UNPF, about 24% and 19% of people in Italy and Canada are aged 65 years or above, respectively. This is anticipated to increase the risk of these populations developing CKD hence augmenting the segment growth.

Furthermore, the rising government initiative for spreading awareness regarding CKD and early diagnosis is also contributing to the market growth. For instance, the CDC Chronic Kidney Disease (CKD) Initiative focuses on a comprehensive public health strategy, involving other public health agencies and national organizations, to address CKD. This program supports activities such as disease surveillance, assists in increasing knowledge of CKD and its complications, encourages early detection and treatment, and enhances the quality of life for those who have CKD. Similarly, the Kidney Failure Probability Equation (KFRE) is a simple and extensively used method for predicting the risk of kidney failure among patients with CKD.

North America Expected to Hold Largest Market Share over the Forecast Period

North America is expected to witness a significant market share in the chronic kidney diseases market over the forecast period. The major factors driving the market growth are the rising prevalence of chronic kidney diseases, the presence of well-established healthcare infrastructure along with high health spending, and technologically advanced diagnostic tests.

The increasing burden of chronic kidney diseases among the population is the key factor driving the market growth. for instance, as per the report published by American Kidney Fund in February 2022, an estimated 37 million Americans have kidney disease, and 92,000 Americans are on the kidney transplant waiting list (as of February 2022). In addition, per the 2022 statistics published by the American Cancer Society, about 79,000 new cases of kidney cancer (50,290 in men and 28,710 in women) are expected to be diagnosed in the United States in 2022. As per the same source, the lifetime risk of developing kidney cancer is higher in men (2.02%) than in women (1.03%). This is anticipated to fuel the market growth over the forecast period.

With the presence of well-established healthcare infrastructure and high healthcare spending in the region, the studied market is expected to grow over the forecast period. According to the OECD, in June 2022, United States healthcare spending in 2021 was 17.8% of the total GDP of the country. In addition, as per the CMS, the NHE is projected to grow at an average of 5.1% over 2021-2030 and to reach USD 6.8 trillion by 2030. As national health expenditure is projected to grow 1.1% points faster than gross domestic product per year on average over 2021-2030 the health share of the economy is projected to rise by 19.6% in 2030.

Furthermore, the rising company focus on adopting various business strategies such as collaborations, acquisitions, partnerships, product launches, and approvals is also contributing to the market growth. For instance, in April 2021, the USFDA approved Farxiga (dapagliflozin) oral tablets to reduce the risk of kidney function decline, kidney failure, cardiovascular death, and hospitalization for heart failure in adults with chronic kidney disease who are at risk of disease progression.

Chronic Kidney Disease Market Competitor Analysis

The market studied is fragmented, owing to the presence of many major players. Some of the market players are Abbott Laboratories, Amgen Inc., AstraZeneca PLC, Beckman Coulter, F. Hoffmann-La Roche Ltd, GlaxoSmithKline PLC, Pfizer Inc., Siemens Healthineers, Sysmex Corporation, and Teva Pharmaceutical Industries Ltd.

Additional Benefits:

  The market estimate (ME) sheet in Excel format
 3 months of analyst support

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