

Dialysis Concentrate Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The dialysis concentrate market is projected to grow with a CAGR of 5.73% during the forecast period (2023 - 2028).

Coronavirus disease 2019 (COVID-19) has impacted the care and results of dialysis patients worldwide. SARS-CoV-2 infection and mortality are more common among dialysis patients, and many have experienced psychological anguish and delayed or poor care. According to an article published by the National Center for Biotechnology Information in May 2022, titled "COVID-19 in Dialysis: Clinical Impact, Immune Response, Prevention and Treatment", 15% to 20% excess mortality rates have been observed in patients on dialysis in the United States, in early 2020. According to a research article published in July 2020 titled 'COVID-19 and the Kidneys: An Update' published in Frontiers in Medicine Journal, the study results indicate that patients with kidney disease could represent a risk factor in elderly patients for a more severe disease course. Furthermore, a research article published by Hemodialysis International Journal in November 2020, titled 'The Impact of COVID-19 in Hemodialysis Patients: Experience in a Hospital Dialysis Unit', found that COVID-19 has shown a high incidence and mortality rate in hemodialysis patients. Thus, early preventive measures against COVID-19 could decrease the risk of spreading the disease in vulnerable patients.

The factors driving the growth of the dialysis concentrate market are the rising prevalence of kidney diseases such as end-stage renal disease (ESRD), acute kidney injury (AKI), shortage of organ donors, risks associated with transplants, technological advancements, and initiatives by the leading players to introduce advanced products and services. For instance, according to a research article published in September 2020, titled 'Association of Age With Risk of Kidney Failure in Adults With Stage IV Chronic Kidney Disease in Canada', the study results found that the incidence rate of stage IV chronic kidney disease increased with age. For those 75 years and older, the risk of death was much higher than that of kidney failure. The high burden of chronic kidney disease is expected to boost the market, increasing the demand for renal dialysis and further increasing the demand for dialysis concentrates in the coming years. According to the study published by PlosOne, in February 2022, titled "Prevalence of Chronic

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Kidney Disease Stages 3-5 in Low-and Middle-Income Countries in Asia: A Systematic Review and Metanalysis", it has been found that the prevalence of chronic kidney disease stages 3-5 in low-and middle-income countries was 11.2%. In addition, the prevalence rate for chronic kidney disease in east Asia was 12%, 8.6% in east Asia, 12% in south-east Asia, 13.1% in western Asia, and 13.5% in South Asia.

Moreover, the mortality rate associated with chronic kidney diseases is increasing. For instance, according to the Centers for Disease Control, 2021, it has been found that Mississippi had the highest mortality rate for chronic kidney disease, in 2020, in the United States.

However, the complications in dialysis treatment and reimbursement policy issues in growing countries could stifle the dialysis concentrate market's growth.

Dialysis Concentrate Market Trends

Hemodialysis Segment Expects to Drive the Market Growth

The factors driving the growth of the hemodialysis segment are increasing incidences of hypertension and diabetes, which leads to kidney failure, a rising number of patients with kidney disease, and a shortage in the availability of kidneys for transplants.

The rising number of geriatric population suffering from kidney diseases will likely boost the demand for the hemodialysis segment over the forecast period. According to the statistics published by the Centers for Disease Control, in 2021, 38% of people aged 65 years or older are at high risk of developing chronic kidney disease, 12% in people 45-64 years of age, and 6% in people aged 18-44 years.

Additionally, various technological innovations, government initiatives, and the introduction of compact-sized machines that can be conveniently used for home-based treatments significantly boost the demand for the hemodialysis segment. For instance, in March 2022, in India, Safdarjung Hospital set up a new unit with two hemodiafiltrations (HDF) machines, which help patients better purify kidneys during dialysis. In December 2020, Medtronic launched a dialysis machine for neonatal and pediatrics in the United States. Similarly, in October 2020, the United States-based privately held medical device company, Diality, invested around USD 12.5 million in developing a portable hemodialysis system to address the unmet technology needs of the evolving dialysis industry. Thus, the high burden of kidney disease is increasing the demand for hemodialysis, thereby contributing to the market's growth.

North America is Expected to Have the Significant Market Share

The rising incidence of kidney diseases such as end-stage renal disorder (ESRD), chronic kidney disease, and acute kidney injury are expected to drive the demand for hemodialysis. According to the statistics published by the National Institute of Diabetes and Digestive and Kidney Diseases, in September 2021, about 786,000 people in the United States are living with an end-stage renal disorder (ESRD), with 71% of the people are on dialysis, and 29% with a kidney transplant. According to the same source, nearly 500,000 Americans are affected by polycystic kidney disease (PKD), an inherited kidney disorder. According to the United States Organ Procurement and Transplantation Network, in August 2021, 22,817 kidney transplants were completed in the United States. In addition, 90,201 people were on the waiting list for a kidney transplant in the United States as of August 2021.

The incidence of chronic kidney disease is more common in females than males. According to the statistics published by the Centers for Disease Control updates from July 2021, 15% of adults in the United States are expected to have chronic kidney disease. In addition, slightly more common in women (14%) than men (12%).

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Moreover, the research development initiatives and development of machines with advanced technology are also contributing to the growth of hemodialysis, further increasing the demand for dialysis concentrate in the region. For instance, in December 2020, Medtronic launched a dialysis machine for neonatal and pediatrics in the United States. Also, in January 2021, Quanta Dialysis Technologies Ltd, a British medical technology pioneer developing innovative dialysis products and services, received 510(k) clearance from the United States Food and Drug Administration to market its small and simple, high-performance hemodialysis system SC+ in the United States.

Thus, growing kidney disease cases and increasing development in the dialysis segment in the region are expected to boost the dialysis concentrates market growth in the coming years.

Dialysis Concentrate Market Competitor Analysis

The dialysis concentrate market is fragmented and highly competitive, with many players. The companies are adopting various business strategies such as expanding collaborations, partnerships, and acquisitions to retain their market position. Some key players include Fresenius Medical care, Baxter International Inc., B. Braun Melsungen AG, Asahi Kasei Medical Co. Ltd, and Rockwell Medical.

Additional Benefits:

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

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