Global Hemodialysis - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Global Hemodialysis Market size is estimated at USD 37.31 billion in 2024, and is expected to reach USD 48.08 billion by 2029, growing at a CAGR of 5.20% during the forecast period (2024-2029).

The COVID-19 pandemic had a substantial influence on the healthcare systems, with serious ramifications for both COVID-19-infected patients and non-patients, leading to the cancellation of diagnostic and treatments. The government's restrictions to prevent the spread of the coronavirus among people have lowered the demand for treatment services for chronic diseases such as kidney disease, diabetes, and hypertension, leading to the closure of healthcare clinics, and hospitals. This restricted the diagnosis and treatment of patients with chronic kidney diseases and hampered market expansion. For instance, according to an article published by Elsevier in Kidney International Reports, in September 2020, titled 'The Adverse Effect of COVID Pandemic on the Care of Patients With Kidney Diseases in India', the availability of consumables for hemodialysis and peritoneal dialysis and essential medicines were affected by the lockdown across the globe. The total number of patients on regular dialysis decreased from 2517 to 2404 (from 972 to 928 in public and from 1545 to 1476 in the private sector). In addition, as per the same source,28.2% of patients missed 1 or more sessions of dialysis during the initial 3 weeks of lockdown and the treating nephrologists advised an additional 77 patients (47 in the public and 30 in the public sectors) to reduce their frequency of dialysis to accommodate potential dialysis requirements for COVID-19-positive patients and limitations imposed by the hospitals. Thus, the lack of availability of dialysis services in the public and private hospitals has severely impacted the patients, thus impacting the market growth.

However, the people affected by the COVID-19 pandemic were found to develop kidney diseases and other chronic conditions. For instance, according to an article published by Johns Hopkins University, in March 2022, titled 'COVID-19 Impact on Patients with Kidney Disease', it has been observed that the people infected with COVID-19 showed signs of kidney damage, and even those with no prior kidney problems were infected with the kidney disease. The rising risk of developing chronic kidney diseases and acute kidney injury among patients is likely to increase the demand for hemodialysis, thereby boosting the market growth.

Certain factors that are propelling the market growth are the rising number of end-stage renal diseases and increasing incidences of diabetes and hypertension among the population. For instance, according to the 2020 report of the International Society of Nephrology (ISN), kidney disease affects approximately 850 million population globally in 2020 and as per estimates, one in ten adults has chronic kidney disease (CKD). Further, as per the same source, the global burden of CKD is continuously increasing and is projected to become the 5th most common cause of years of life lost globally by 2040. Thus, the increasing burden of kidney diseases is expected to rise the market growth.

The increasing prevalence of hypertension and diabetes among the population is increasing the risk of developing kidney disease and kidney failure. Diabetic nephropathy is a common complication of type 1 and types 2 diabetes, as the blood vessel clusters in the kidney may get damaged, by the high blood glucose level in the patient, which helps in filtering the waste from the body and results in the renal damage. For instance, according to the 2022 statistics published by the International Diabetes Federation in the 10thedition of 2021, in Spain, 5,141.3 thousand people are living with diabetes, in 2021. In addition, as per the same source, this number is projected to reach 5,576 thousand by 2030 and 5,647.6 thousand by 2050. Also, as per the same source, 6,199.9 thousand people are living with diabetes, in 2021, in Germany. In addition, as per the same source, this number is projected to reach 6,519.7 thousand by 2030.

Furthermore, according to an article published by Clinical hypertension journal, in February 2021, titled 'Prevalence, awareness, treatment, and control of hypertension in Nigeria in 1995 and 2020: A systematic analysis of current evidence', it has been observed that 27.5 million people in Nigeria was having hypertension in 2020. In addition, as per the same source, about 29.0% of cases were aware that they had hypertension, 12.0% were receiving treatment, and 2.8% had blood pressure that was within the target range, in 2020, in Nigeria. Thus, the increasing burden of diabetes and hypertension among the population is expected to increase the risks of developing kidney diseases by narrowing the arteries and decreasing the blood flow to the kidneys, which is expected to increase the demand for hemodialysis treatment, thereby boosting the market growth.

However, the risks and complications associated with dialysis are expected to restrain the market growth.

Hemodialysis Market Trends

Conventional Long-term Hemodialysis is the Segment by Modality is Expected to Hold Largest Market Share over the Forecast Period

The Conventional Long-term Hemodialysis segment is expected to witness significant growth in the hemodialysis market over the forecast period owing to the factors such as the rising number of patients with chronic kidney diseases, increasing company activities, and huge acceptance of hemodialysis therapy over peritoneal dialysis among chronic kidney diseases (CKD) and end-stage renal disease (ESRD) patients.

The COVID-19 pandemic has affected hemodialysis procedures. However, to cope with the crisis created by COVID 19, in July 2021, NephroPlus launched its Dialysis on Call service in Hyderabad in a bed to expand its portfolio of service offerings by taking the dialysis setup to a patient's place and conducting the procedure at their convenience. The advantage of the service is that the machine and other equipment do not need to be stationed in the patient's home. Also, in July 2020, NephroPlus launched India's first 'Dialysis on Wheels' Program where a patient can undergo dialysis inside an ambulance itself that comes to their home and is accessible to patients across Delhi, Gurgaon, Faridabad, Ghaziabad, and Noida region. This model is anticipated to drastically reduce the cost of home hemodialysis, which will encourage more patient adoption. Additionally, the relaxation in lockdown guidelines is increasing the therapeutic procedural rate, which further increases the segment growth.

In addition, according to the Organ Procurement and Transplantation Network, around 92,000 people as of February 2022 are waiting for kidney transplants in the United States. In addition, as per the same source, in 2021, 25,490 people (or about 1 in 5) were able to get a kidney transplant in the United States. Thus, owing to the shortage of kidneys for transplant is expected to increase the demand for hemodialysis among the population which further increases the market growth over the forecast period.

Furthermore, major manufacturers have focused on developing specialized dialysis equipment coupled with growing partnerships and collaboration among market players, which is expected to drive the market's growth. Currently, various home and in-center hemodialysis machines are available in the market. For instance, in June 2021, Max Healthcare's Max@Home service launched home hemodialysis services for patients in collaboration with NephroPlus. Also, in October 2020, Fresenius Medical Care North America (FMCNA) entered into an innovative partnership with Livongo Health, Inc, to improve the lives and outcomes of people with late-stage chronic kidney disease (CKD) by increasing optimal dialysis starts, as well as offer earlier evaluation of transplantation and home dialysis options.

Therefore, owing to the aforementioned factors, the studied market is expected to have significant growth over the forecast period.

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

North America is expected to dominate the hemodialysis market over the forecast period owing to the factors such as the increasing prevalence of chronic kidney diseases, hypertension, and diabetes, well-established healthcare infrastructure, and high healthcare spending in the region.

The rising burden of chronic diseases such as kidney diseases, diabetes, and hypertension is the key factor driving the market growth over the forecast period. For instance, according to 2022 statistics published by the International Diabetes Federation, in the 10thedition of 2021, 2,974.0 thousand people were living with diabetes 2021 in Canada. In addition, as per the same source, this number is projected to reach 3,288.2 thousand by 2030 and 3,468.5 thousand by 2045. As per the same source, 32,215.3 thousand people were living with diabetes in 2021 in the United States and this number is projected to reach 34,755.3 thousand by 2030 and 36,289.9 thousand by 2045. Thus, the increasing number of diabetes cases is expected to increase the risk of developing kidney diseases in patients which are expected to increase the demand for hemodialysis procedures, thereby boosting the market growth. Similarly, according to the data published by the Centers for Disease Control and Prevention in Chronic Kidney Disease in the United States 2021 report, it has been observed that the people aged 65 years and above have the highest prevalence of chronic kidney disease with 38%, followed by people ages 45 to 64 (12%) and people ages 18 to 44 (6%), in the United States.

Furthermore, the rising geriatric population in the region who are more prone to develop hypertension, diabetes and chronic kidney diseases are also contributing to the market growth over the forecast period. For instance, according to the 2022 statistics published by the United Nations Population Fund, in the United States, a large proportion of the living population is aged 15-64 and accounts for 65% in 2022. In addition, as per the same source, 17% of the population is aged 65 years and above in 2022. Thus, the increasing aging population is expected to develop chronic kidney disaeses an end-stage renal diseases which increases the demand for dialysis and kidney transplantation, thereby boosting the market.

Moreover, the rising company activities in developing advacnced hemodialysis machine, and consumables are also contributing to the market growth. For instance, in December 2020, Medtronic launched its Carpediem Cardio-Renal Paediatric Dialysis Emergency Machine in the United States upon receiving Food and Drug Administration's (FDA) marketing authorization. The first machine was installed at Cincinnati Children's Hospital Medical Center. Also, in October 2020, Diality invested around USD 12.5 million in developing a portable hemodialysis system to address the unmet technology needs of the evolving dialysis industry.

Therefore, owing to the aforementioned factors, the studied market is expected to have a significant growth in the region over the forecast period.

Hemodialysis Industry Overview

The market studied is a moderately consolidated market owing to the presence of market players. Some of the players in the hemodialysis market are Asahi Kasei Corporation, B Braun Melsungen AG, Baxter International Inc., Becton, Dickinson and Company, Cantel Medical Corp., and DaVita Inc., Fresenius Medical Care AG & Co. KGaA, Medtronic PLC, and Nipro Corporation.

Additional Benefits:

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

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