

Philippines Dialysis Market Report and Forecast 2024-2032

Market Report (7 Days) | 2024-04-09 | 120 pages | EMR Inc.

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Report description:

Philippines Dialysis Market Report and Forecast 2024-2032

Philippines Dialysis Market Overview

The Philippines dialysis market is estimated to grow at a compound annual growth rate (CAGR) of 5.2% from 2017 to 2032. The market is driven by the increasing prevalence of chronic kidney disease (CKD) and end-stage renal disease (ESRD) in the country, which is attributed to the high incidence of diabetes, hypertension, obesity and aging population. According to the Philippine Renal Disease Registry, there were about 36,000 ESRD patients in 2017, of which 86% were undergoing dialysis treatment. The demand for dialysis services is expected to increase further as the number of ESRD patients is projected to reach 58,000 by 2022 and 95,000 by 2032.

Philippines Dialysis Market Drivers and Constraints

The Philippines dialysis market is also supported by the favorable government policies and initiatives, such as the Universal Health Care Act, the PhilHealth Z Benefit Package for ESRD, the National Kidney and Transplant Institute Act, and the Philippine Organ Donation and Transplantation Program. These policies and programs aim to improve the access, affordability and quality of dialysis care for the Filipino population, especially the poor and marginalized sectors. The government also provides subsidies and incentives for the establishment and operation of dialysis centers and facilities, as well as for the procurement and maintenance of dialysis equipment and supplies.

However, the Philippines dialysis market also faces several challenges and constraints, such as the limited availability and supply of dialysis machines, consumables and trained personnel, the high cost and out-of-pocket expenses of dialysis treatment, the low awareness and compliance of patients and caregivers, the lack of standardization and regulation of dialysis practices and quality, and the risk of infections and complications associated with dialysis. These factors hamper the growth and development of the market and pose significant barriers to the delivery and utilization of dialysis services in the country.

Philippines Dialysis Market Trends and Developments

The Philippines dialysis market is witnessing several key trends and developments that are shaping the market landscape and creating new opportunities and challenges for the market players. Some of the major trends and developments are:

- ☐ Rising Prevalence of Chronic Kidney Disease: The increasing incidence of CKD, mainly due to diabetes, hypertension, and other lifestyle-related diseases, is driving the demand for dialysis services in the Philippines.

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- Government Initiatives: The Philippine government has implemented various initiatives to improve access to dialysis treatment, including the PhilHealth Z Benefit Package for kidney transplantation and the expanded Primary Care Benefit package, which covers outpatient dialysis services.
- Expansion of Dialysis Centers: There is a growing trend of expanding dialysis centers across the country, both in urban and rural areas, to cater to the increasing demand for dialysis services.
- Advancements in Dialysis Technology: The introduction of advanced dialysis machines and equipment, including portable and home dialysis systems, is improving the quality of care and convenience for patients.
- Public-Private Partnerships: Collaborations between the government and private sector are increasing to enhance the availability and affordability of dialysis services. This includes partnerships with private dialysis providers and non-profit organizations.
- Increasing Awareness and Early Detection: Efforts to raise awareness about kidney health and the importance of early detection of kidney disease are contributing to the earlier diagnosis and treatment of CKD, leading to increased demand for dialysis services.

Philippines Dialysis Market Segmentation

Market Breakup by Type

- Hemodialysis
 - o□Conventional Hemodialysis
 - o□Short Daily Hemodialysis
 - o□Nocturnal Hemodialysis
- Peritoneal Dialysis
 - o□Continuous Ambulatory Peritoneal Dialysis
 - o□Automated Peritoneal Dialysis

Market Breakup by Product & Services

- Equipment
 - o□Dialysis Machines
 - o□Water Treatment Systems
 - o□Others
- Consumables
 - o□Dialyzers
 - o□Catheters
 - o□Others
- Dialysis Drugs
- Services

Market Breakup by End User

- In Center Dialysis
- Home Dialysis

Philippines Dialysis Market Regional Analysis

The Philippines dialysis market is characterized by significant regional variations and disparities in terms of the availability, accessibility, affordability, and quality of dialysis services. The regional analysis of the market provides a comparative and comprehensive overview of the market performance, dynamics, and potential across the three major regions of the country: Luzon, Visayas, and Mindanao.

Philippines Dialysis Market Competitive Landscape

The Philippines dialysis market is highly competitive and fragmented, with the presence of numerous local and international players, both public and private, who offer a wide range of dialysis services, products, and solutions to the market. The competitive landscape of the market provides a detailed and comprehensive overview of the market structure, dynamics, and performance of the key players and stakeholders in the market.

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Fresenius SE & Co. KGaA, Asahi Kasei Corporation, and B. Braun SE are renowned for their innovation and comprehensive solutions in dialysis care. Baxter and BD are pivotal in providing a range of dialysis products and technologies that enhance patient care. DaVita Inc. stands out for its dialysis services, offering patient-centric care across various settings. AngioDynamics, Diaverum Deutschland GmbH, and Nikkiso Co., Ltd. are recognized for their specialized products and contributions to improving dialysis treatment outcomes. Nipro and Hemotek are instrumental in supplying essential dialysis consumables and equipment, supporting the infrastructure of dialysis care. The Nepro Group Dialysis Center and Dialife Group extend their services to meet the growing demand for accessible dialysis treatment. Medtronic and NxStage Medical, Inc. push the boundaries of innovation in dialysis technology, offering solutions that aim to improve the quality of life for those undergoing dialysis. Together, these organizations form a dynamic and essential part of the global dialysis market, driving forward improvements in care, technology, and accessibility for patients worldwide.

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*Additional insights provided are customisable as per client requirements.

* The coverage of the Market Landscape section depends on the data availability and may cover a minimum of 80% of the total market. The EMR team strives to make this section as comprehensive as possible.

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