

# End-Stage Renal Disease (ESRD) Dialysis Devices and Services Worldwide

## Report Highlights

May 2008

# Report Benefits

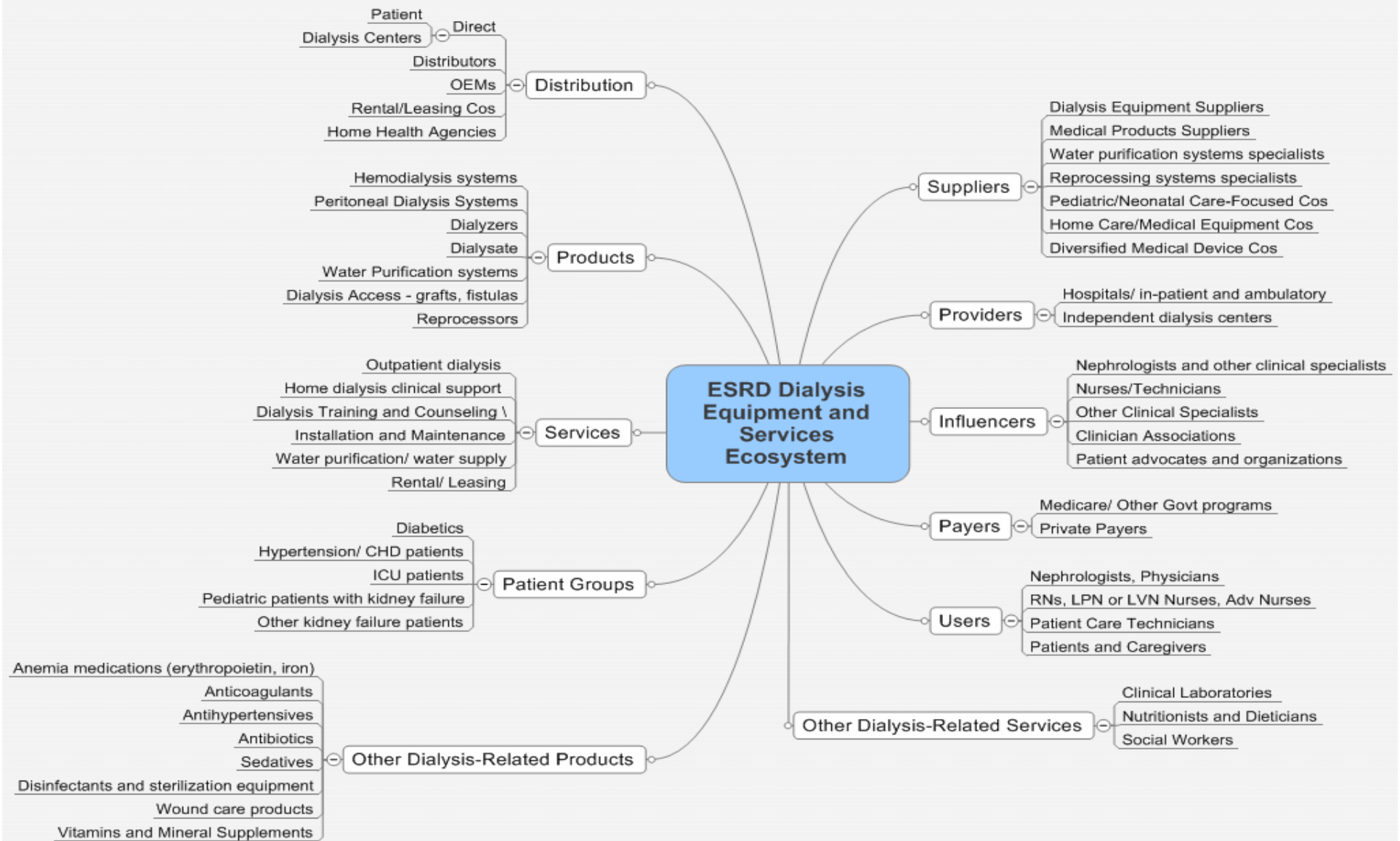
This report can help in:

- Assessing the market for End-Stage Renal Disease (ESRD) Dialysis Devices and Services worldwide, growth segments, and growth regions.
- Understanding market drivers and restraints, market segmentation, and competitive segmentation.
- Strategic planning and competitive strategy.
- Identifying opportunities for partnerships and alliances.

# Key Takeaways

- The world market for end-stage renal disease renal dialysis devices and services is expected to reach \$64.5 billion by the end of 2008, growing at a rate of 3.7 percent per year during the 2005-2014 period.
- The total number of dialysis patients worldwide is expected to reach 2 million by 2010 and 4 million by 2025..
- Consolidation of service and product manufacturers across the world is set to continue, raising the entry barrier for newcomers while existing leaders tap into previously under penetrated markets and establish themselves as providers of comprehensive, cost-effective services with measurable clinical outcomes.
- ESRD patient population have several co-morbidities. Market leaders have been focusing on case management strategies to improve outcomes and reduce mortality.

# ESRD Dialysis Market Ecosystem



# Key Market Drivers

- A significant increase in ESRD is expected, fuelled by increases in incidence of hypertension, diabetes and obesity in conjunction with aging populations around the world. Rates of both chronic and acute renal failure are likely to increase as a result. Renal failure is a chronic worldwide epidemic, for which dialysis is the primary treatment modality.
- Rapid economic growth in India and China, the two most populous nations in the world will lead to more healthcare expenditures.
- Clinical evidence proposing that more frequent dialysis is more effective compared to periodic dialysis.
- Market for Single-Use Dialyzers is on the upswing with Fresenius driving this segment. The company offers CarePak brand single-use therapy bundle - Optiflux high-flux dialyzes, Granuflo dry acetate concentrate, CombiSet bloodlines, and FMCNA manufactured saline.

- US treatment trends: a) Increase in the use of Vitamin D and IV iron replacement therapy; b) Anemia correction and increase in EPO dosing; c) Continued high use of catheters, despite association with increased infectious complications and mortality.
- Catheter usage is lower in Europe.
- Hemodialysis is the most widely used form of dialysis therapy in most parts of the world. Peritoneal dialysis is more common in Hong Kong, Jalisco (Mexico), and Iceland.
- There are significant differences in reimbursement structure and rates across Europe, with up to 100% difference in treatment rates in some cases.

# Sample Market Table

## Spain - Total Market for Dialysis Products & Services (US \$, 2005-2014)

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	CAGR
<b>SERVICES</b>											
\$ Million											
Growth (%)											
% Dialysis Total											
<b>PRODUCTS</b>											
\$ Million											
Growth (%)											
% of Total											
<b>Total (\$ Mill)</b>											
<b>Growth (%)</b>											

Source: Marketstrat™

<b>Regions Covered</b>	<b>North America</b> (USA, Canada, Mexico); <b>Latin America</b> ; <b>EMEA</b> (Africa, Middle East, Eastern Europe, UK, Spain, Portugal, Italy, France, Germany, Rest of Europe); <b>Asia-Pacific</b> (Japan, S. Korea, China, Taiwan, Australia, Singapore, ROAPAC)
<b>Product/Market Segments</b>	<p><b>Global by country/region</b> (US \$ 2005 – 2014)</p> <ul style="list-style-type: none"> <li>- ESRD Dialysis Products (\$)</li> <li>- ESRD Services (\$)</li> </ul> <p><b>US Market Forecasts (2005 – 2014)</b></p> <ul style="list-style-type: none"> <li>- ESRD Dialysis Services (\$)</li> <li>- Hemodialysis Machines (units &amp; \$): Institutional vs. Home HD machines</li> <li>- Hemodialysis Dialyzers (units &amp; \$): Single-use vs. Reusable</li> <li>- Hemodialysis Supplies (\$): Blood Lines; Fistula Needles; Catheters</li> <li>- Peritoneal Dialysis Products: PD Cyclers (units &amp; \$); PD Supplies (\$)</li> </ul>
<b>Companies Profiled</b>	~ 100 companies worldwide
<b>Market Estimates/ Forecasts</b>	<b>Global:</b> US \$ (2005-2014); <b>USA:</b> US \$ and Units (2005 – 2014)
<b>Marketstrat® Analytical Framework</b>	Drivers and Restraints; Market Share, Competitive Position Map, Competitive Segmentation, Market Segment Summaries, Ecosystem
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