Global and China Hemodialysis Industry Report, 2011-2012

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STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include China Customs and public information of mentioned listed companies etc.

Abstract

Hemodialysis is a blood purification technology mainly used for the treatment of end-stage renal disease (ESRD) patients. The global hemodialysis population grew at a CAGR of over 9% in 1990-2010, reaching 2.029 million in 2010. Due to the high cost, the dialysis population is principally concentrated in developed regions such as Europe and the United States. In 2011, the United States, Europe Union and Japan accounted for over 50% of the global dialysis population.

The dialysis population is relatively small in developing countries, but has been growing fast. In the last decade, the number of dialysis patients in China, India and Brazil rose at a rate of more than 15%, far higher than 3%-5% in Europe and the United States. Moreover, barely 10% of ESRD patients are on hemodialysis in developing countries, much lower than 80% in Europe and the United States. Along with the expansion of health insurance coverage and the rise in national income in developing countries, the number of dialysis patients is expected to grow rapidly in a relatively long period.

The hemodialysis industry is composed of hemodialysis service and hemodialysis equipment sectors, with the ratio of market size maintaining 5.2:1 in 2010-2011. In 2010, the global market size of hemodialysis service approximated USD58.8 billion, mainly concentrated in developed regions like North America, Europe and Japan. The hemodialysis service is principally provided by public institutions in Europe, but by private agencies in the U.S. and Japan. Presently, the global leading providers of hemodialysis service include Fresenius Medical Care, DaVita and Kuratorium which served a total of 350,000 dialysis patients in 2010.

The global hemodialysis equipment market features a high concentration ratio and is mainly occupied by European and American enterprises. In 2010, the global top 3 dialysis equipment manufacturers were German Fresenius Medical Care, American Baxter and Swedish Gambro.

Fresenius Medical Care is the world's largest provider of hemodialysis equipment and service. As of the end of 2011, it set up 2,898 dialysis centers and served 233,000 patients with renal disease. Baxter, the world's largest manufacturer of peritoneal dialysis equipment, accounted for 72% of the peritoneal dialysis market share in 2010.

China witnesses the mounting demand for hemodialysis therapy, and made up around 7.4% of the global hemodialysis population in 2011. Because of technical backwardness, hemodialysis equipment in China mainly relies on imports. The products imported from companies including Fresenius Medical Care and Gambro occupied up to 80% of the hemodialysis equipment in the Chinese market.

The major domestic hemodialysis equipment manufacturers include Weigao Holding, Jiangsu Lengthen Life Science and Technology, and Jihua Medical Apparatus and Instruments which have greatly improved their product technology and quality, but not competitiveness, and have difficulty in entering the domestic key hospitals (especially third-level and first-class hospitals). However, some of their products have been exported to Saudi Arabia, Indonesia and Cuba.

It is in the report that covers the followings.

✓ The number of hemodialysis patients and distribution in the world;

✓ Status quo, competition and development trend of global hemodialysis equipment and service market;

✓ Market size, competitive landscape and forecast of Chinese hemodialysis industry;

✓ Import & export volume, value, countries or regions of Chinese hemodialysis equipment;

✓ Current situation and competition structure of global and China hemodialysis equipment market segments;

✓ Operation, development prospects and advantages of major hemodialysis product providers at home and abroad.

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