



# **Global and China Hemodialysis Industry Report, 2013-2016**

**May 2014**

## 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 Company Reports, and National Bureau of Statistics of China etc.

## Abstract

Hemodialysis, also known as artificial kidney, is a type of blood purification technology, primarily applicable to the treatment of patients with renal failure.

In 2013, the global number of patients receiving dialysis continued to grow to 2.519 million. The new patients mainly come from Asia Pacific region (excluding Japan), whereas for Europe, America, Japan and other mature markets, since these countries have a higher proportion of patients with advanced renal failure receiving treatment, so they have a slower growth in the number of patients receiving dialysis. For example, in 2013, the number of patients receiving dialysis in Asia-Pacific region grew by 17.0% YoY; while in Japan, EU and US, the number of patients receiving dialysis grew by only 2%-4% YoY.

The global hemodialysis market can be divided into two parts: hemodialysis service and hemodialysis equipment, of which the scale of hemodialysis service market is larger, accounting for about 85% of the overall market.

### 1 Hemodialysis Service Market

Global hemodialysis service market has great regional differences: in Europe and Asia Pacific, public institutions dominate, however, in

North America, private-company-operated institutions and in Latin America, private clinics are the main forms. Currently, global companies providing hemodialysis service mainly include Fresenius Medical Care, DaVita, etc. The number of patients receiving hemodialysis in these two companies in 2013 came to nearly 340,000.

Dialysis services in China are mainly provided by all levels of hospitals, mainly due to that currently the national health insurance reimbursement ratio is relatively low and the affordability of patients is not high, resulting in lower proportion of patients with end-stage renal disease undergoing dialysis treatment, which was only about 12% in 2013. In 2013 the number of Chinese patients with renal failure undergoing dialysis treatment (mainly hemodialysis treatment) was approximately 250,000, and number of patients undergoing peritoneal dialysis was less than 30,000. But with the gradual expansion of China's health insurance coverage at all levels, the proportion of patients with end stage renal disease undergoing treatment will rise sharply and the market prospects will be very promising.

## **2 Dialysis Equipment Market**

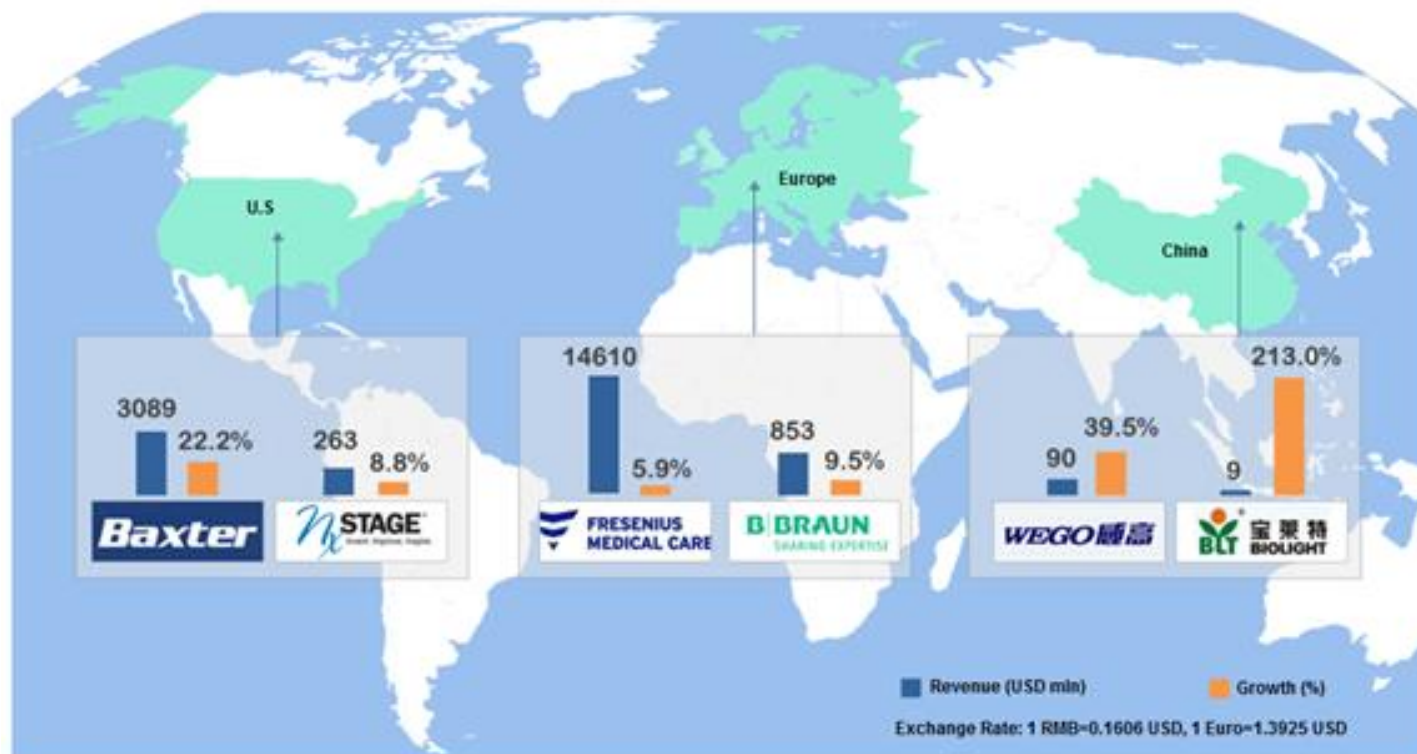
The global hemodialysis equipment market is relatively concentrated, mainly dominated by European, American and Japanese companies. The first-tier brands are American and European brands, including Germany-based Fresenius and Braun, U.S.-based Baxter and so on; the second-tier brands mainly are Japanese brands, including NIKKISO, Nipro, Toray and so on. In 2013, market share of Fresenius and Baxter in the global dialysis equipment market reached 34% and 30% respectively.

Local Chinese hemodialysis equipment has poor competitiveness and low market share. In 2013, China's hemodialysis equipment import dependency rate was about 70%. Chinese manufacturers in the field of dialysis include: hemodialysis machine manufacturers like Jihua Medical Apparatus and Instruments Co., Ltd, Guangdong Biolight Meditech Co., Ltd and Chongqing Shanwaishan Science & Technology Co., Ltd; dialyzer manufacturers include Shandong Weigao Group and Jiangsu Lengthen Life Science and Technology Co., Ltd; peritoneal dialysis solution manufacturers include Huaren Pharmaceutical Co., Ltd and Sichuan Kelun Pharmaceutical Co., Ltd.

The "Global and China Hemodialysis Industry Report, 2013-2016" published by ResearchInChina includes the following main contents:

- ✘ Global hemodialysis population and distribution, etc.;
- ✘ Status quo, competition pattern and development trend of the global hemodialysis equipment and service markets;
- ✘ Market scale, competition pattern, import & export and development forecasting, etc of China hemodialysis industry;
- ✘ Status quo and competition pattern of global and China hemodialysis equipment market segments;
- ✘ Operational analysis, hemodialysis business analysis and development forecasting of 16 global and Chinese enterprises in the hemodialysis industry.

## Revenue from Dialysis Service and Growth Rate of Several Global Companies, 2013



Source: Global and China Hemodialysis Industry Report, 2013-2016, ResearchInChina

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