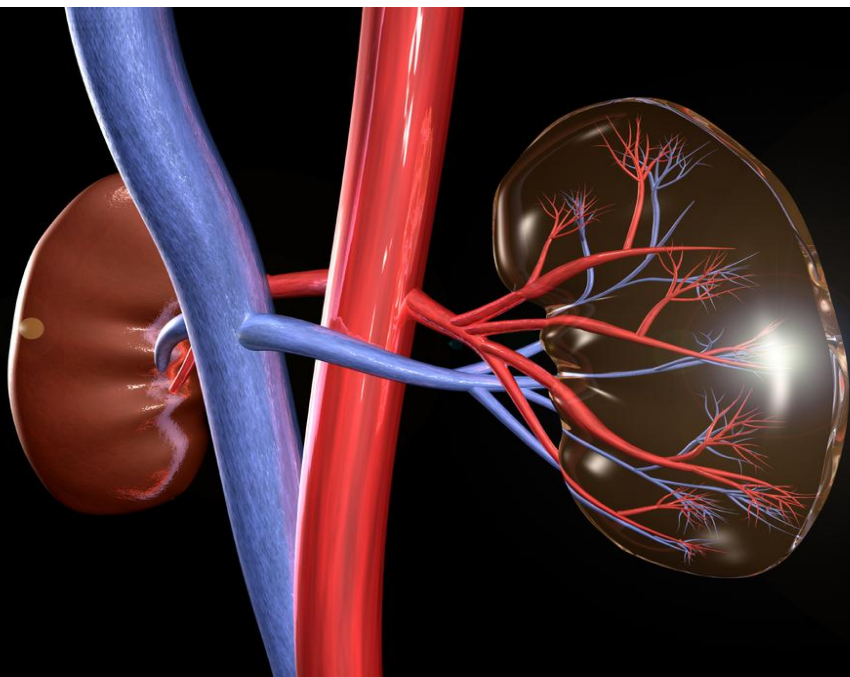


Global End Stage Renal Disease Market: Size, Trends and Forecasts (2016-2020)

June 2016



Daedal Research

Global ESRD Market Report

Scope of the Report

The report titled "Global End Stage Renal Disease Market: Size, Trends and Forecasts (2016-2020)" provides an in-depth analysis of the global ESRD market with detailed analysis of market size and growth, market share and economic impact of the industry. The report also provides market size of each of the segments of the market on the basis of the treatment opted by the patients along with the detailed overview of the home dialysis market. The report provides detailed market share analysis of the global dialysis market by players as well.

The report also includes the country analysis of the U.S. and Japan for ESRD market. It provides the analysis of ESRD patient volume along with the kidney transplant and dialysis market on the basis of the volume. The segments of the dialysis market are also analyzed in detail.

The report provides detailed regional analysis of North America, Europe, Middle East and Africa (EMEA), Asia-Pacific and Latin America for the dialysis market. Regional analysis includes market size by volume along with the segments and clinic operators in each region.

The report also assesses the key opportunities in the market and outlines the factors that are and will be driving the growth of the industry. Growth of the overall global ESRD market has also been forecasted for the period 2016-2020, taking into consideration the previous growth patterns, the growth drivers and the current and future trends. The competition in the global dialysis market is stiff and dominated by the big players like FMC. Further, key players of the dialysis market Baxter and Davita are also profiled with their financial information and respective business strategies.

Regional Coverage

- North America
- EMEA
- Asia-Pacific
- Latin America

Country Coverage

- The U.S.
- Japan

Company Coverage

- Fresenius Medical Care
- Baxter International
- Davita Healthcare Partners

Global ESRD Market Report

Executive Summary

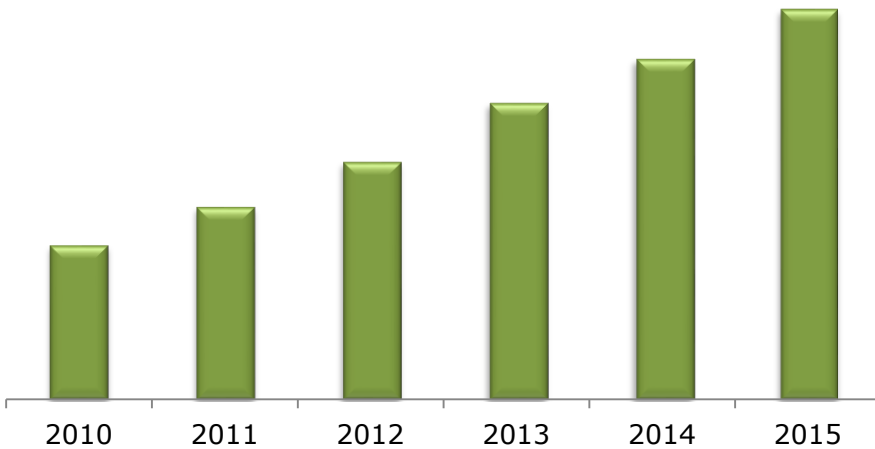
End Stage renal disease (ESRD) occurs when the kidneys are no longer able to carry out their daily functions, requiring either dialysis or transplantation to sustain life. When properly functioning, kidneys act to filter the body of metabolic wastes, which are excreted as urine, and to maintain fluid balance. Chronic kidney failure, a decline in kidney function most often related to diabetes or hypertension, but resulting from other causes as well, including vascular disease, genetic disorders, and exposure to toxic levels of certain drugs. The best strategy for preventing ESRD is to detect chronic kidney failure at the earliest possible stage so that the decline in kidney function can be slowed through the use of medications and tight control of blood sugar and blood pressure levels.

The global ESRD market increased at a significant CAGR during the span of 5 years, i.e. 2010-2015 and projections are made that the market would rise in the next five years i.e. 2016-2020 tremendously. The upsurge in the market was due to the various reasons such as is diabetic nephropathy, genetic diseases, infection, drugs, traumatic injury, major surgery and etc. The market can be segmented on the basis of treatment as kidney transplant and dialysis. The global dialysis market can be segmented on the basis of products and services. On the basis of products, the market is segmented into hemodialysis and peritoneal dialysis while on the basis of services, the market is segmented into in-center dialysis and home dialysis.

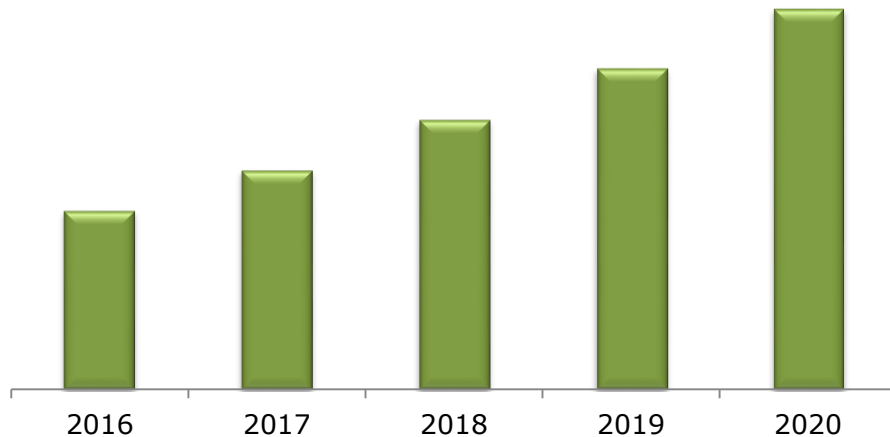
The growth drivers for the market are: rise in diabetic and aging population, upsurge in per capita healthcare expenditure along with the emerging countries such as India, China and Brazil. Despite the market is governed by various growth drivers, there are certain challenges faced by the market such as: disparities in the access to renal transplant therapy, less public awareness and negative societal effects.

Global ESRD Market Overview

Global ESRD Market by Volume;
2010-2015 (Million)

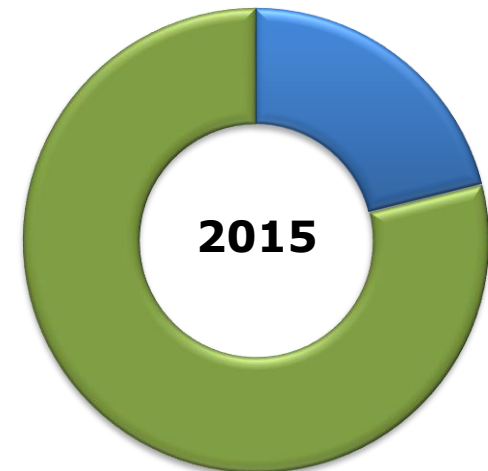


Global ESRD Market by Volume;
2016E-2020E (Million)



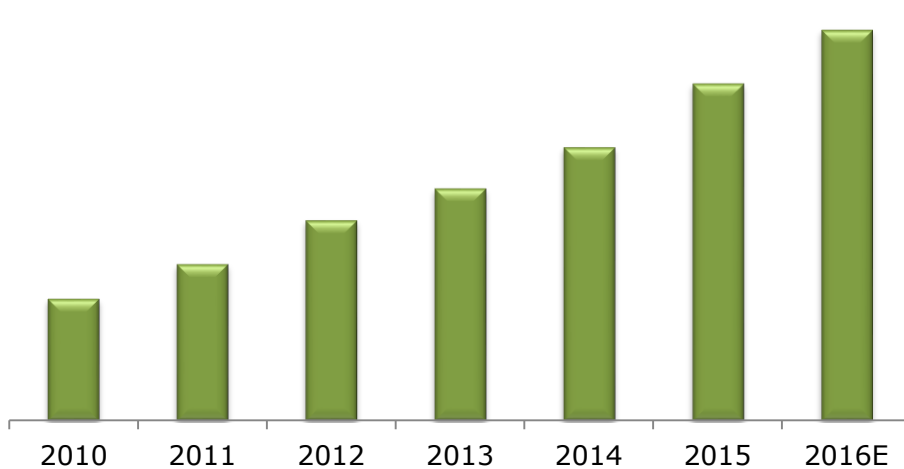
The global ESRD market, in terms of volume, in 2015 reached ...million patients, up by ...% as compared to 2014. This market is forecasted to reach ...million patients in 2020, at a CAGR of ...%. The increase in the market is expected due to is diabetic nephropathy,, Higher healthcare expenditure. There are two segments in the global ESRD market on the basis of treatment, that are Dialysis treatment and Kidney transplantation. The larger segments was with ...% of share in the global ESRD market in 2015.

Global ESRD Market by Segments; 2015

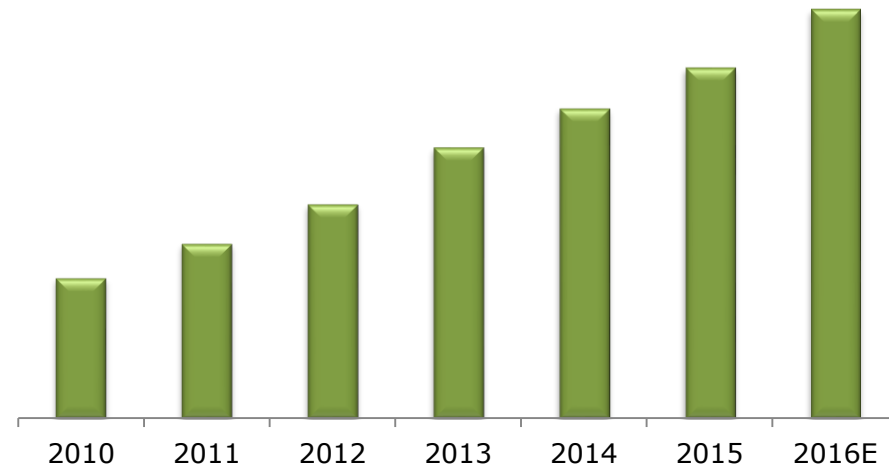


Global ESRD Market by Segments

Global Kidney Transplant Market by Volume; 2010-2016E (Thousand)



Global Dialysis Market by Volume; 2010-2016E (Thousand)

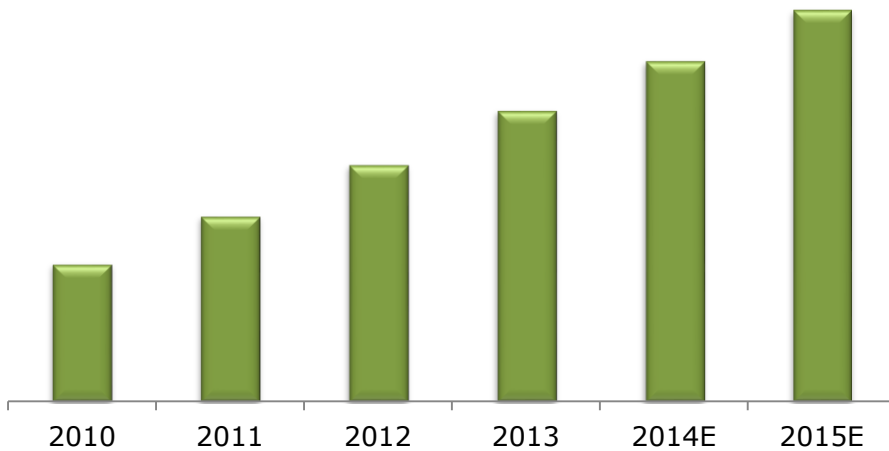


In 2013, the patients living with kidney transplant were thousand across the globe which are projected to have increased to thousand in 2015 and will reach thousand by the end of 2016.

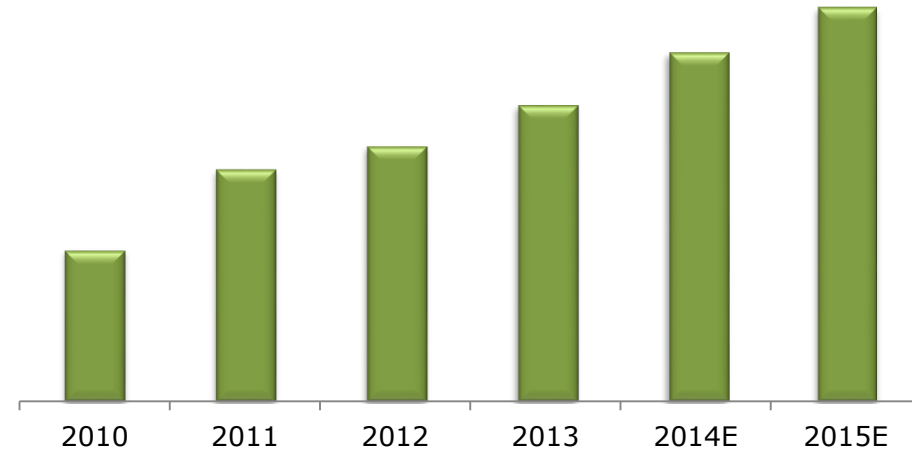
The number of patients taking dialysis treatment has increased to million in 2015 from million in 2010 at a CAGR of%. According to the estimates, the volume of patients will increase to million in 2016 at an annual growth rate of%.

Country Analysis: Market Overview

The U.S. ESRD Market by Volume;
2010-2015E (Thousand)



Japan ESRD Market by Volume;
2010-2015E (Thousand)

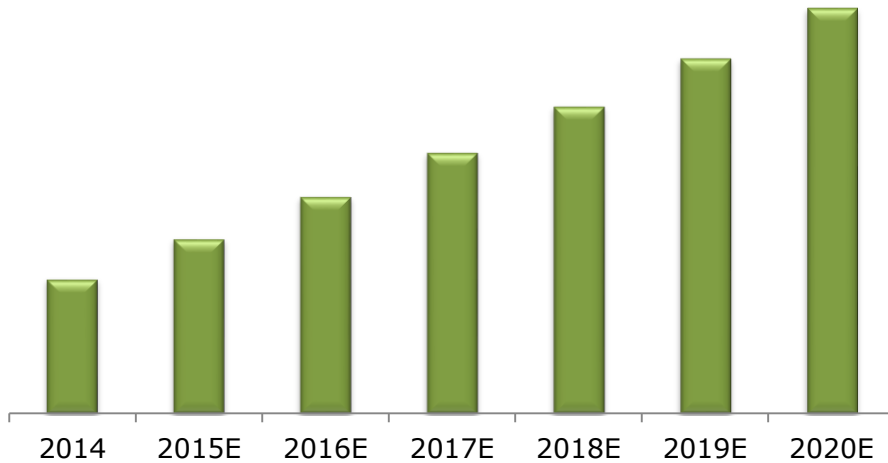


In 2013, there were thousand prevalent patients of ESRD in the U.S., an increase of% since 2012. According to the estimates, the number of patients is projected to have grown to thousand in 2015.

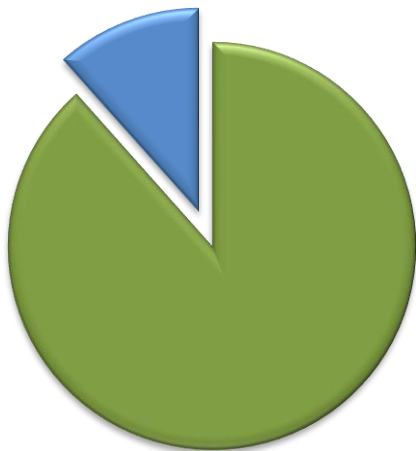
The Japan ESRD population totaled to thousand in 2013 and is estimated to have reached thousand in 2015 with as the primary cause of the disease.

Global Dialysis Market Overview

Global Dialysis Market by Value; 2014-2020E (US\$ Billion)

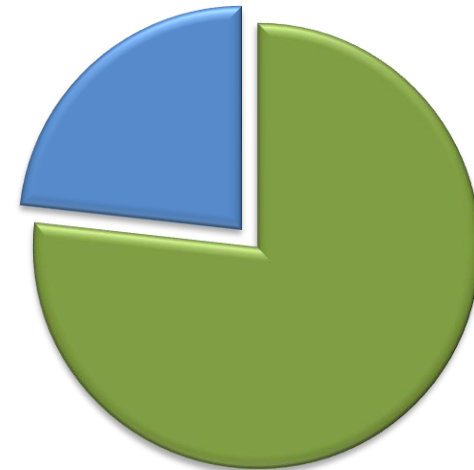


Global Dialysis Market by Segments on the Basis of Products; 2015



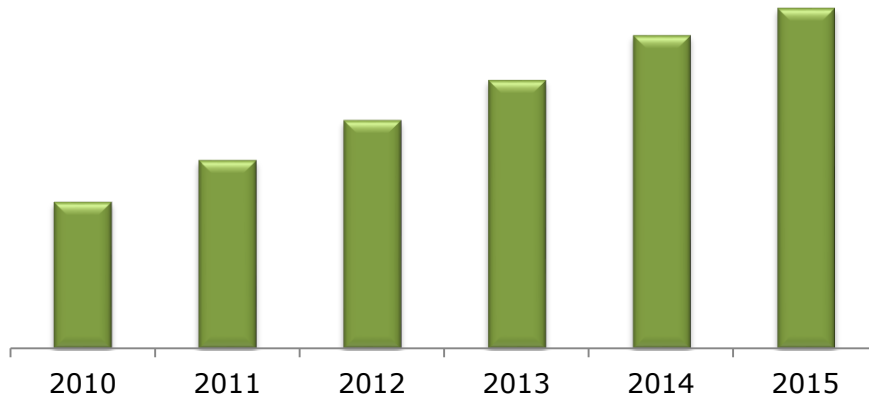
The global dialysis market in 2014 was valued at US\$... billion. This market is forecasted to reach US\$.....billion in 2020, at a CAGR of%. The market is segmented on the basis of product type into hemodialysis and peritoneal dialysis. largely governed the market accounting more than% of the entire market. The market can be segmented on the basis of services into in-center dialysis and home dialysis. In 2014, in-center dialysis market accounted% share of the entire market while home dialysis market comprised% share.

Global Dialysis Market by Segments on the Basis of Services; 2014

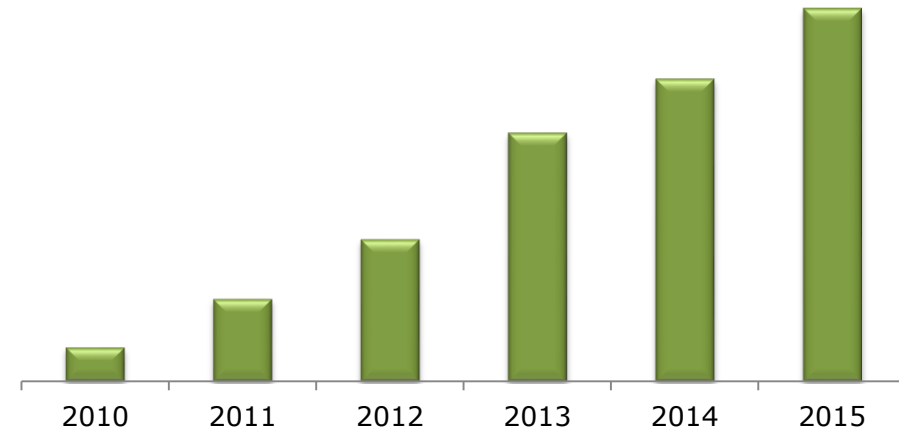


Regional Analysis: Dialysis Market

North America Dialysis Market by Volume;
2010-2015 (Thousand)



Asia-Pacific Dialysis Market by Volume;
2010-2015 (Thousand)



The dialysis market in North America, in terms of patient volume, has been rising tremendously. The number of patients opting for dialysis increased to ... thousand in 2013 from ... thousand in 2010 and is expected to have reached ... thousand in 2015.

The dialysis market in the Asia-Pacific region, in terms of number of patients, is largest among all the regions globally. The patient volume increased to ... million in 2015 from ... thousand in 2010. In fact, the market is projected to witness the growth of approximately ...% in the near future.