THE KIDNEY DIALYSIS MARKET

Robust growth of U.S. kidney dialysis market continues despite pricing cap

The market for kidney dialysis products and services in the United States is flourishing, due to an aging population and longer survival rates for patients with end stage renal disease (ESRD). The population needing dialysis is increasing by almost 10% annually. Between 1990 and 1996, the U.S. market nearly doubled, surging from $4.5 billion to $8.6 billion.

On the global front, excellent growth of dialysis products and services is expected to continue, fueled by the emerging markets of Asia and other parts of the world.

What strategies are necessary to stay competitive in — and capitalize on — present market conditions? How has the recent spate of mergers and acquisitions altered market share? Which dialysis service sector is seeing the strongest growth and why? FIND/SVP gives you the answers. Among the findings:

- National chains now own about one-third of all dialysis centers. FIND/SVP expects that figure to leap to 70% by 2000, with the remaining centers divided between hospitals and independents.

- In 1994 and 1995, Fresenius USA saw a level of growth twice that of the dialysis market as a whole. Get detailed financial data and market shares in this report.

Consolidation is not just for major chains. This report lists seven criteria one leading treatment chain uses in selecting targets and shows you why an acquisition strategy can be important to all competitors.

- Amgen's EPO treatment, Epogen, holds a sizable market share. Get an inside look at Amgen's litigation and licensing efforts which have thus far succeeded in keeping all other EPO makers out of the U.S. market.

- More than half of all patients receiving treatment for chronic kidney disease in the United States are over 55. Get a complete breakdown by age in this report.

Profiles of 14 Leading Competitors

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<td>Fresenius USA Inc.</td>
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<td>Baxter International Inc.</td>
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<td>Continental Choice Care Inc.</td>
<td>Renal Treatment Centers Inc.</td>
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Mergers and acquisitions on the upswing

With dialysis reimbursements fixed, consolidation is a necessity for leading competitors that hope to retain market share and raise profit margins. 

• Total Renal Care is expanding existing networks and creating new ones through acquisition of existing facilities and development of new centers. The company recently reached a cooperative agreement with the USC Medical School for management of the dialysis unit at the Los Angeles County USC Medical Center.

• While there are numerous centers providing dialysis services (an estimated 2,670), there are extremely few manufacturers of equipment and supplies for such services; worldwide the market was dominated by just three companies in 1996.

• As the U.S. market becomes even more dominated by the major players, there will be increased interest in geographic expansion to serve the emerging markets of Asia and South America. Get the details in this report.

Industry resourceful under tough conditions

The kidney dialysis industry has responded creatively to today’s market duality of pricing constraints and increased demand for ESRD treatment.

• In the United States, the hemodialysis market is strong, but growth of peritoneal dialysis is even stronger, with double-digit increases expected to continue through the year 2000. This report gives you all the figures.

• In countries where government payment policies support the most cost-effective therapies (Australia, New Zealand, Canada, UK), peritoneal dialysis usage is almost double that of the United States.

• Limiting use of acetaminophen could lower incidence of kidney failure by 11%. Individuals who take on average one pill a day for a year are thought to double their risk of kidney failure.

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