U.S. Kidney Dialysis Clinics: An Industry Analysis
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Factors affecting demand for kidney dialysis (aging population, obesity, diabetes, organ transplants and donations, economy)

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Market Size, Growth, Forecasts

Estimates of industry size and growth published by other research firms (IBIS World, First Research, Anything Research, NEJM Catalyst, Marketdata)

Size / Annual Receipts of kidney dialysis centers industry from 2007-2016, official government Census 5-year survey data and annual County Business Patterns data

Marketdata estimates & forecasts of receipts for 2017-2019, 2023 F

Discussion & analysis of historical growth trends, during last recession, recovery since then, current situation, rationale for forecasts

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- Annual Growth Rate of the Kidney Dialysis Market: 2007-2016
- Revenues of the leaders (Davita, Fresenius) for 2012-2018

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Discussion and statistics related to population aging trends

Discussion and statistics related to obesity trends

Discussion and statistics related to diabetes trends

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Tables:
- Prevalence of obesity in the U.S. by state and region: 2000-2017
- Participants with diabetes, self-reported cardiovascular disease: 2007-2012
- Hospital discharge status of first AKI hospitalization for Medicare patients aged 66+, 2013
- Causes of death in ESRD patients, 2012-2014
- All-cause mortality rates (per 1,000 patient years at risk) for Medicare patients aged 66+, by CKD status and year, 2001-2013
Industry Economic Operating Ratios

Summary of key industry metrics, NAICS code for the industry, what it includes

- Annual % change in receipts: 2007-2016

Industry ratios (no. of firms, establishments, receipts, payroll as % receipts for 2012) by:

- legal form of organization - corporations, sole proprietorships, partnerships: no. of employees).
- Single vs. multi-unit operations, by size (statistics as above)
- Concentration Ratios: ratios for top 4, 8, 20, 50 largest firms
- Receipts size of establishments (under $10,000 to $10+ mill.)
- Receipts size of firms (under $100,000 to $100+ mill.)

- No. of establishments, receipts & avg. receipts per establishment, by state: 2012
- No. of establishments, receipts & avg. receipts per establishment, by state – 2016
  (County Business Patterns, Marketdata estimates)

Competitor Profiles

(description and history of company, no. of clinics operated, headquarters address, specialties, acquisitions, services, financial data when available, 2018 results, fines and actions against the company)

- Fresenius Medical Care
- Davita Kidney Care
- U.S. Renal Care

Reference Directory

List of kidney dialysis national/regional trade associations, journals, consulting firms, reports, articles, other key contacts – address & phones, description of activities.