

# **U.S. Kidney Dialysis Clinics:** **An Industry Analysis**

July 2019

By: Marketdata LLC

## **Table of Contents**

	<b>Page</b>
<b><u>Report Scope and Methodology</u></b>	
Sources and methodology used for the report, report scope.	1-4
<b><u>Nature &amp; Structure of the Industry</u></b>	5-21
Definition and number of kidney dialysis centers in the U.S. worldwide	
Major industry trends and issues: consolidation, push for home dialysis, Medicare and insurance reimbursement, new 2019 Trump executive order, staff shortages, fines & investigations of the leaders.	
Main types of dialysis: hemodialysis, peritoneal dialysis, acute dialysis	
Discussion of home dialysis options: cost savings, cyclor devices	
Industry structure: key metrics: no. of facilities, receipts, annual payroll, no. of employees, avg. receipts per facility – 2002, 2007, 2012, 2016	
Main operating models used by kidney dialysis centers	
Factors affecting demand for kidney dialysis (aging population, obesity, diabetes, organ transplants and donations, economy)	
Operations: sources of revenue, typical patient volumes, revenues per patient visit, facility profit margins	
Competition and Consolidation: discussion of main competitors, interest by venture capital, NIH study of consolidation from 2001-2011 and its effect on patient choices	
Reimbursement situation discussion, requirements and cuts under Medicare	

### **Tables:**

- Kidney Dialysis Industry Snapshot: 2016, 2012, 2007, 2002

## **Market Size, Growth, Forecasts**

22-31

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

Discussion of major factors affecting industry growth: reimbursement, demand, aging of population, obesity, increase in lifestyle diseases, organ donations, etc.

### Tables:

- Size of the U.S. Kidney Dialysis Market: 2007-2016
- Annual Growth Rate of the Kidney Dialysis Market: 2007-2016
- Revenues of the leaders (Davita, Fresenius) for 2012-2018
- Forecast Size of the U.S. Kidney Dialysis Market: 2017, 2018, 2019, 2023

## **Customer Demographics**

32-43

Discussion and statistics related to population aging trends

Discussion and statistics related to obesity trends

Discussion and statistics related to diabetes trends

Discussion and statistics related to kidney failure and ESRD (end stage renal disease) trends

Discussion and statistics related to kidney transplants

### 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**

44-56

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

- Industry snapshot: 2002, 2007, 2012, 2016: key ratios (payroll, no. estab., receipts, Avg. receipts per estab.)
- 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**

57-77

(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**

78-82

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