Dialysis Market in India – Size, Key Forces and Future Evolution

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Deloitte India Structure

Founded: 1845 | Global Network: 460,000+ professionals
Healthcare Consulting across 150+ countries

Core Services: Strategy | Risk | Transaction
Integrity-driven service, fostering inclusion for measurable impact

Organization Structure:

Theory vs Practice

Theoretical Understanding:
- Structured understanding of dialysis ecosystem
- Framework-based market analysis

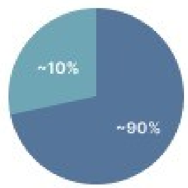
Practical Exposure:
- Variability in care quality and infrastructure
- Real-world operational challenges

Project

Research Goals:
- Analyze size, structure, and growth drivers of dialysis market
- Understand key providers and market dynamics
- Assess future evolution based on demand-supply factors

Dialysis Definition:
Dialysis is a life-sustaining treatment for patients with end-stage kidney disease (ESKD), where the kidneys fail to remove waste and excess fluids from the blood. It acts as an artificial replacement for lost kidney function.

Dialysis Types in India



- **Hemodialysis:** Blood filtered using machine (dialyzer)
- **Peritoneal:** Uses abdomen lining to filter blood

Dialysis Providers

A. Government (Public Sector)
- PMNDP: Free hemodialysis in government hospitals under PPP model

B. Private Sector
- NephroPlus–Largest network (250+ centers)
- Fresenius Medical Care India
- Braun Avitum India
- Apollo Hospitals
- Fortis Healthcare
- Max Healthcare

Research Challenges & Learning

Challenges:
- Data accessibility issues
- Limited Tier 2/3 coverage information

Key Learnings:
- Gained a holistic view of India's dialysis market dynamics.
- Learned about market assessment.
- Recognized the critical role of accessibility, affordability, and awareness in healthcare delivery.

Strategic Recommendations

Capex: Support to Make in India for manufacturing of dialysis machines, dialyser, and solutions to reduce cost.

Financing: Improvement of financing, both by government and healthcare insurance, to ensure optimal coverage of the population for dialysis.

Awareness: Stronger detection of ESRD patients and accompanying risk factors will ensure that preventive measures can be taken, as well as the availability of treatment can be accelerated

Conclusion

The dialysis industry is a growing segment of the Indian healthcare industry due to the strong presence of both public and private providers, as well as public financing and growing awareness of the population. However, a wide gap of dialysis exists particularly in Tier 2 and beyond, and has to be serviced by innovative mechanisms such as peritoneal dialysis.

SWOT Analysis

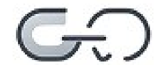
STRENGTHS

- Strong global brand and extensive network
- Expertise in risk management and transaction advisory services

WEAKNESSES

High dependency on global economic conditions

Complex regulatory environments in India



OPPORTUNITIES

- Growing demand for risk and transaction advisory in India
- Technological advancements in analytics and AI

THREATS

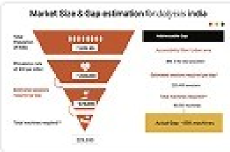
Intense competition in consulting and advisory sector

Market Forces

Demand-Side Forces:
- Rising number of CKD and ESRD cases is driving increased demand for dialysis services.
- An ageing population is contributing to a higher incidence of kidney-related complications.
- Growing rates of diabetes and hypertension are major factors behind the surge in dialysis need.
- Improved awareness and early diagnosis are bringing more patients into treatment pathways.

Supply-Side Forces:
- The government's PMNDP initiative is expanding access by offering free dialysis at public hospitals.
- End-to-end Dialysis Players.
- Per-session dialysis cost is reducing.
- Advanced dialysis machines & tech-enabled care are enhancing service quality in leading centers

Market Sizing:



Cost Per Session	INR
Public	1500
Private	2000

Est Market Size	INR Bn
Public Sector	25.40
Private sector	34.78
Total	60.18