
Market Scenario

Global plasma fractionation market is expected to grow significantly over the forecast period. It is anticipated that the market held a valuation of USD 18073 million in 2017 and is projected to grow at a CAGR of 6.5% over the forecast period.

In plasma fractionation process protein products are fractionated from human plasma for the prevention, and treatment of life-threatening conditions such as congenital deficiencies, immunologic disorders, and others.

Rising participation of market players is one of the key factors driving the plasma fractionation market. For instance, in 2018, Grifols acquired 24 plasma donation centers in the United States operated by Biotest Pharmaceuticals Corp. for USD 286 million. With this acquisition, Grifols now owns 249 plasma donation centres to increase its supply of plasma proteins used for therapeutic purposes.

Various other factors such as increasing geriatric population, technological advancements, emerging markets in APAC and RoW, rising plasma collection, and increasing prevalence of respiratory and autoimmune disorders are also expected to propel the growth of the market.

However, the emergence of recombinant alternatives, high cost of advanced products, and unfavourable reimbursement policies can hamper the market growth over the forecast period.

Segmentation

The global plasma fractionation market is segmented based on product, application, end user, and region.

The global market for plasma fractionation, by product is segmented into immunoglobulin, coagulation factor concentrates, albumin, protease inhibitors, and others. The immunoglobulin segment is further classified as intravenous immunoglobulin (IVIG), subcutaneous immunoglobulin (SCIG), and others. The coagulation factor concentrates segment is further classified as Factor VIII, Factor IX, Von Willebrand Factor, Prothrombin Complex Concentrate, Fibrinogen Concentrates, and Factor XIII.

Based on application, the market is segmented into immunology, neurology, hematology, critical care, pulmonology, rheumatology, hemato-oncology, and others.

Based on end user, the market is segmented into hospitals & clinics, clinical research laboratories, academic institutes, and others.

In the current scope of the study, the above-mentioned segments are covered into the four global regions, namely the Americas, Europe, Asia-Pacific and the Middle East & African region.

The plasma fractionation market in the Americas has further been segmented into North America and South America, with the North American market divided into the US and Canada.

The European plasma fractionation market has been segmented into Western Europe and Eastern Europe. Western Europe has been classified as Germany, France, the UK, Italy, Spain, and the rest...
of Western Europe. The plasma fractionation market in Asia-Pacific has been segmented into Japan, China, India, South Korea, Australia, and the rest of Asia-Pacific. The plasma fractionation market in the Middle East & Africa has been segmented into the Middle East and Africa.

Regional Market Summary

Global Plasma Fractionation Market Share (%), by Region, 2017

The Americas dominated the global market for plasma fractionation owing to the presence of major market players and increasing prevalence of immunodeficiency disorders within the region. According to the 2018 study published in the Allergy, Asthma & Clinical Immunology journal, the estimated overall prevalence of immunoglobulin A (IgA) deficiency in the US was approximately 1 in 300 to 1 in 500 persons.

In 2017, it was estimated that Europe stood second in the global plasma fractionation market. This can be attributed to the increasing technological advancements, and rising R&D investments.

Asia Pacific was projected to be the fastest growing region in 2017. Increasing healthcare expenditure drives the regional markets of the Asia Pacific region. According to the Australian Institute of Health and Welfare, from 2015 to 2016, the total health expenditure was USD 181 billion. Out of this, USD 69 billion was spent on hospitals, which is a real increase of USD 2 billion from the previous year. During the same years, non-government sources spent USD 55.8 billion on health.

On the other hand, the Middle East and Africa held least share in the global plasma fractionation market due to inadequate economic development, especially within the African region.

Research Methodology

Market Research Future research is conducted by industry experts who offer insights into industry structure, market segmentation, assessment, Competitive Landscape (CL), penetration, as well as on emerging trends. Besides primary interviews (~ 80%) and secondary research (~ 20%), their analysis is based on their years of professional expertise in respective industries. Our analysts also predict where the market will be headed in the next five to ten years, by analysing historical trends and current market positions. Furthermore, the varying trends of segments and categories geographically presented are studied and are estimated based on the primary and secondary research.

Primary Research

Extensive primary research was conducted to gain a deeper insight of the market and the industry performance. In this particular report we have conducted primary surveys (interviews) with key level executives (VPs, CEOs, Marketing Directors, Business Development Managers, and many more) of major players who are active in the market. In addition to analyzing the current and historical trends, our analysts predict where the market is headed, over the next five to ten years.

Secondary Research

Secondary research was mainly used to collect and identify information useful for extensive, technical, market-oriented, and commercial study of the plasma fractionation. It was also used to obtain key information about major players, market classification, and segmentation according to
industry trends, geographical markets, and developments related to the market and perspectives. For this study, analysts have gathered information from various credible sources, such as annual reports, SEC filings, journals, white papers, corporate presentations, company web sites, international organization of chemical manufacturers, some paid databases, and many others.

Intended Audience
- Government and Private Laboratories
- Research and Development (R&D) companies
- Medical Research Laboratories
- Market Research and Consulting Service Providers

Market Segmentation and Key Market Players

Global Plasma Fractionation Market, by Product
- Immunoglobulin
  - Intravenous Immunoglobulin (IVIG)
  - Subcutaneous Immunoglobulin (SCIG)
  - Others
- Coagulation Factor Concentrates
  - Factor VIII
  - Factor IX
  - Von Willebrand Factor
  - Prothrombin Complex Concentrate
  - Fibrinogen Concentrates
  - Factor XIII
- Albumin
- Protease Inhibitors
- Others

Global Plasma Fractionation Market, by Application
- Immunology
- Neurology
- Hematology
- Critical Care
- Pulmonology
- Rheumatology
- Hemato-Oncology
- Others

Global Plasma Fractionation Market, by End User
- Hospitals & Clinics
- Clinical Research Laboratories
- Academic Institutes
- Others

Global Plasma Fractionation Market, by Key Players
- Bio Products Laboratory (BPL)
- Biotest AG
- China Biologic Products Holdings, Inc.
- CSL Limited
- Green Cross Corporation
- Grifols, S.A.
- Japan Blood Products Organization
- Kedrion S.p.A
- LFB group
- Octapharma AG
- Sanquin
- Shanghai RAAS
- Shire
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