

Vietnam Plasma Fractionation Market by Product (Albumin, Immunoglobulins, Coagulation Factor VIII, and Coagulation Factor IX), Application (Neurology, Hematology, Immunology, Critical Care, and Others), and End User (Hospitals and Research Laboratories): Opportunity Analysis and Industry Forecast, 2020–2027

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Abstracts

The Vietnam plasma fractionation market was valued at \$56.62 million in 2019, and is expected to reach \$79.03 million by 2027, registering a CAGR of 5.3% from 2020 to 2027. Blood is made up of solid components such as platelets, red blood cells, white blood cells, and a liquid component called plasma. Plasma is a straw-colored fluid, comprising 90% water and 10% dissolved gases, proteins, nutrients, ions, and waste materials. It contains a wide variety of proteins that can be isolated on the basis of their solubility characteristics particular to each protein at specific conditions of ethanol concentration, pH, temperature, ionic strength, and protein concentration. This enables extraction of these proteins through sequential precipitation allowing the isolation of certain proteins by centrifugation, filtration, and chromatography. Plasma fractionation is extensively used for manufacturing immunoglobulins and albumin along with several protein derivatives such as thrombin, protein C, factor IX, and factor VIII as key intermediates. These plasma derivatives have numerous applications in the fields of hematology, immune disorders, infectious diseases, shock, burns, restoring blood volume in trauma as well as rare chronic conditions. For instance, clotting factors in blood plasma are used for treating coagulation disorders such as disseminated intravascular coagulation or hemophilia. In critical care conditions, plasma is often prescribed to prevent and stop bleeding. Moreover, some of these derivatives are declared as essential medicines by WHO as there are no substitutes available in the

market, thus creating various opportunities for the manufacturers.

Vietnam, on the other hand, is a potentially large healthcare market wherein the presence of public sector is overpowering the private sector, comprising of more than 85% of the hospitals and commune health stations across the country. As per World Bank Group, Vietnam is considered as a middle-income country with a healthcare expenditure of 5.53% of its GDP. To succeed as a middle-income country, the Vietnamese government is currently focusing on building core public health capacities in workforce development, diseases surveillance, emergency management, laboratory systems, and others for prevention and control of diseases. In addition, based on the current demographic trends in Vietnam, it is projected to become an aged society by 2035. Thus, this estimated change in demographics is anticipated to increase the onset of different diseases among the Vietnamese population in the coming future thereby resulting in surged demand for novel and innovative disease management approaches. Moreover, owing to the long-lasting effect of the herbicides used in Second Indochina War (Vietnam War), the population is already bearing some major illnesses, correspondingly having a similar impact on the future generations in the country.

According to the data published by U.S. Department of Veterans Affairs in 2020, some of these illnesses include chronic B-cell leukemia, Hodgkin's disease, multiple myeloma, Non-Hodgkin's lymphoma, respiratory cancers, Chloracne, and diabetes mellitus type 2. Considering the current unmet medical needs within the country, the demand for the plasma products is expected to increase, justifying the ever-increasing incidences of immunological disorders, hemophilia, metabolic, and neurological disorders. Therefore, the country provides lucrative opportunities to the domestic pharmaceutical companies for setting up their plasma fractionation plants to meet the population demand. Considering the country's need to work towards self-sufficiency in plasma fractionated products, in 2015, a local firm "An Phat Pharmaceutical and Medical Equipment JSC" proposed and received a license to develop Vietnam's 1st plasma fractionation factory. The plant was scheduled to start the production of albumin, FVIII, prothrombin, IVIG, and other plasma derivatives from 2018. However, considering the unmet Good Manufacturing Practice (GMP) standards, the production discontinued. Later, in 2019, the blood bank in "Ho Chi Minh City Blood Transfusion Hospital" was declared to meet the GMP requirements as per European standards for treatment process of plasma. Currently, Vietnam does not have their own plasma manufacturing plant, it imports the plasma fractionated products namely the coagulation factors VIII, factor IX, and albumin, and gamma globulin products from developed countries. Thus, the blood bank provides an opportunity for Vietnam to manufacture their own plasma products and exchange it overseas.

The pre-existing medical conditions in the Vietnamese population, owing to the side effects of the Second Indochina War coupled with aging population is anticipated to drive the growth of the Vietnam plasma fractionation market. In addition, unavailability of the substitutes for plasma fractionated products is expected to drive the market growth in Vietnam, since these products cannot be replaced owing to their histocompatibility, post-translational modifications, and absence of recombinant approaches for replication of these proteins. On the contrary, stringent regulations, both in terms of higher quality standards of the products and integrated logistics to source and collect the blood plasma and timely delivery to clinics, hospitals, and pharmacies are the anticipated factors to hinder the market growth. However, the unmet medical needs of the Vietnamese population are possibly expected to provide profitable opportunities for the plasma fractionation manufacturers to expand their geographical reach.

The Vietnam plasma fractionation market is segmented on the basis of product, application, and end user. By product, the market is classified into albumin, immunoglobulins, coagulation factor VIII, and Coagulation factor IX. Under immunoglobulin segment, the Vietnam plasma fractionation market is further bifurcated in to intravenous immunoglobulin (IVIG) and subcutaneous immunoglobulin (SCIG). By application, the market is categorized into neurology, hematology, immunology, critical care, and others. By end user, the Vietnam plasma fractionation market is bifurcated into hospitals and clinical research laboratories.

KEY BENEFITS FOR STAKEHOLDERS

This report provides a detailed quantitative analysis of the current market trends and future estimations from 2020 to 2027, which assists to identify the prevailing market opportunities.

An in-depth analysis of various regions is anticipated to provide a detailed understanding of the current trends to enable stakeholders to formulate region-specific plans.

A comprehensive analysis of the factors that drive and restrain the growth of the Vietnam plasma fractionation market is provided.

An extensive analysis of various regions provides insights that allow companies to strategically plan their business moves.

KEY MARKET SEGMENTS

By Product

Albumin

Immunoglobulins

Subcutaneous Immunoglobulin (SCIG)

Intravenous Immunoglobulin (IVIG)

Coagulation Factor VIII

Coagulation Factor IX

By Application

Neurology

Hematology

Immunology

Critical Care

Others

By End User

Hospitals

Clinical Research Laboratories

KEY MARKET PLAYERS

Baxter International Inc.

Biotest AG

Bio Products Laboratory Ltd.

Getz Healthcare

Grifols SA

Kedrion Biopharma

Octapharma

Novo Nordisk

Sanova Healthcare

Sanquin Blood Supply Foundation

Takeda Pharmaceutical Company Limited

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