

Latin America Erythropoietin Stimulating Agents Market Demand Analysis & Opportunity Evaluation, 2019-2027

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Abstracts

The Latin America erythropoiesis stimulating agents (ESA) market reached USD 319.2 million in 2018 and is expected to reach USD 533.92 million by 2027, by registering a CAGR of 6.03%, across the region. The demand for erythropoiesis stimulating agents is increasing on the back of the rising demand for efficient drugs to control the effects of impaired production of the molecule erythropoietin.

Brazil is slated to account for a share of 44.77% and reach USD 239.03 million by 2027 in the erythropoiesis stimulating agents market. The market growth in the country can be attributed to the increase in investments in the R&D activities from both government and private entities. The market is expected to expand at a CAGR of 6.29% over the forecast period i.e. 2020-2027. This is primarily attributed to the easier availability of resources and cost effective skilled labor in the region, supported by highly favorable regulatory landscape that supports the growth the pharmaceutical industry in the country.

On the back of the relatively higher rate of development, the market for Chile is expected to grow at a CAGR of 6.39% and is expected to capture a market of USD 47.47 million by 2027. On the back of rising number of incidences, patient-friendly health reforms and plans such as the AUGE-GES Plan through the National Health Fund (Fonasa) and the Pension Health Institutions (ISAPRE), availability of skilled medical resources along with efficient diagnostic solutions to make timely diagnosis and mitigate the effects of anemic condition, the drugs classified as erythropoiesis stimulating agents are witnessing a high demand in the country.

On the basis of product, the market is segmented into epoetin-alfa, epoetin-beta,

epoetin-theta, darbepoetin-alfa, and other ESAs. The epoetin-alfa segment is presently capturing the highest market and is expected to reach USD 274.66 million by the year 2018 with a CAGR of 6.11% over the forecast period. This is primarily attributed to the larger number of products approved for prescription in this segment in comparison to others for anemia caused by renal disorders. Epoetin-beta, although has a similar mode of action in comparison to epoetin-alfa, as presently lower number of drugs, including biosimilars and generic drugs, approved for similar indications for Epoetin-beta in comparison to Epoetin-alfa.

On the basis of application the market is divided into cancer, renal disorders, anti-retroviral treatment, and other indications that would impair the natural production of erythropoietin in the body. ESAs are most frequently prescribed for anemia caused by chronic kidney disease, irrespective of their state of dialysis, due to which the renal disorders segment captured the highest market share in 2018. The segment is expected to grow at a CAGR of 6.17% and is expected to reach USD 376.25 million by 2027.

On the basis of distribution channel, the market is divided into online channel and offline channel. Although with the rising number of internet users and availability of online platforms to purchase pharmaceutical products, the online distribution channel is expected to witness a higher growth, but presently the larger share of population is still dependent on conventional distribution channel such as pharmacies at hospital, ambulatory surgical centers, and retail pharmacies

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