

Antithrombin Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Usage (Therapeutics, Diagnostics, Research, Others), By Source (Human, Recombinant Goat Milk, Others), By Type (Anticoagulant, Antiplatelet, Thrombolytic Drugs), By Region, By Competition

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Abstracts

Global Antithrombin Market has valued at USD 749.86 million in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 4.67% through 2028. The global antithrombin market encompasses the pharmaceutical and biotechnology industry's efforts to produce and distribute antithrombin products. Antithrombin is a naturally occurring protein in the blood that plays a crucial role in preventing excessive blood clotting. Dysfunctional antithrombin levels can lead to thromboembolic disorders, including deep vein thrombosis (DVT), pulmonary embolism (PE), and disseminated intravascular coagulation (DIC). Therefore, antithrombin products are used to treat and prevent these conditions.

Key Market Drivers

Increasing Prevalence of Thrombotic Disorders

Thrombotic disorders, characterized by the formation of dangerous blood clots within the circulatory system, pose a significant threat to public health worldwide. As the incidence of these disorders continues to climb, so does the demand for effective treatments. Among these treatments, antithrombin products are emerging as a crucial player, playing a vital role in preventing and managing thrombotic events.

Thrombotic disorders encompass a range of conditions, including deep vein thrombosis (DVT), pulmonary embolism (PE), stroke, and disseminated intravascular coagulation (DIC). These disorders can lead to life-threatening complications, including organ damage and death. The World Health Organization (WHO) identifies thrombosis as a major contributor to global morbidity and mortality.

As the global population ages, the risk of thrombotic events increases. Advanced age is a significant risk factor for thrombosis due to changes in the vascular system and decreased mobility. Modern sedentary lifestyles, characterized by prolonged sitting and limited physical activity, are associated with an increased risk of thrombotic events, especially DVT. Obesity is a known risk factor for thrombosis, as it leads to inflammation and other metabolic changes that promote clot formation. Conditions such as diabetes, cancer, and cardiovascular disease can increase the risk of thrombotic events. Some individuals inherit genetic factors that make them more susceptible to thrombosis. Major surgeries, including orthopedic, cardiovascular, and gynecological procedures, carry a heightened risk of blood clots. Antithrombin products are often used prophylactically in these situations.

Antithrombin is a natural protein found in the bloodstream that regulates the clotting process. It works by inhibiting several clotting factors, including thrombin and factor Xa. When antithrombin levels are deficient or dysfunctional, the risk of clot formation increases significantly.

The growing number of individuals affected by thrombotic disorders necessitates a greater demand for antithrombin products. These products are essential for preventing and treating clot-related complications. Antithrombin products are used prophylactically in high-risk situations, such as before and after surgery, to prevent clot formation. As surgical procedures become more common, the demand for antithrombin therapy rises accordingly. Patients who experience thrombotic events often require therapeutic antithrombin treatment to dissolve existing clots and prevent further complications. The increasing prevalence of thrombotic disorders has spurred research and development efforts to create more effective antithrombin therapies, including recombinant products and novel formulations.

Aging Population Disorders

The world's population is aging at an unprecedented rate, with a significant impact on healthcare systems globally. As people age, they become increasingly vulnerable to

various health conditions, including thrombotic disorders, which involve the formation of blood clots within blood vessels. This demographic shift towards an older population is a powerful driver behind the growth of the global antithrombin market.

The aging of the global population is a well-documented phenomenon. Advances in healthcare, improved living conditions, and better access to medical care have led to longer life expectancies. As a result, the world is witnessing a significant increase in the number of older adults, particularly those aged 65 and older. This demographic shift has profound implications for healthcare, including an increased prevalence of age-related health conditions.

Aging leads to changes in the coagulation and fibrinolysis pathways, making older individuals more susceptible to clot formation. Age-related chronic conditions like cardiovascular disease, diabetes, and cancer increase the risk of thrombosis. Older adults often have decreased mobility, which can lead to the stagnation of blood flow and an increased risk of clot formation. Older adults may undergo surgical procedures, which can be associated with a higher risk of post-operative thrombosis.

As the population ages, the number of individuals at risk of thrombotic disorders rises. This results in a greater demand for antithrombin products for both prophylactic and therapeutic use. Older individuals may require surgery for various medical conditions. These surgeries often necessitate the use of antithrombin products to prevent post-operative clot formation. Antithrombin therapy becomes crucial in managing thrombotic complications associated with age-related chronic illnesses, such as cardiovascular diseases. The growing demand for antithrombin products has incentivized pharmaceutical and biotechnology companies to invest in research and development. This has led to innovations in antithrombin therapies, including recombinant products and improved formulations.

Advancements in Biotechnology and Pharmaceuticals

The global antithrombin market is experiencing a transformative period, with advancements in biotechnology and pharmaceuticals playing a pivotal role in its growth. Antithrombin, a crucial protein in regulating blood clotting, has seen significant improvements in production techniques, safety, and efficacy, which are driving its increasing relevance in the healthcare sector.

Biotechnology has enabled the development of recombinant antithrombin products. These are produced using genetically engineered cells, which offer a controlled and

consistent source of antithrombin, reducing the risk of contamination and supply shortages. Innovative purification methods have been developed to extract antithrombin from human plasma more effectively. These techniques yield highly purified antithrombin concentrates with minimal impurities, enhancing safety and efficacy. Biotechnology has allowed for the development of novel antithrombin formulations, including stable liquid preparations, which offer convenience and ease of administration for patients and healthcare providers.

Research has led to a deeper understanding of the mechanisms behind thrombotic disorders, enabling the development of more targeted antithrombin therapies. These therapies have shown enhanced efficacy in specific patient populations. Long acting antithrombin products have been developed, reducing the frequency of administration for patients. This not only improves patient compliance but also reduces the burden on healthcare systems. Ongoing research has led to the development of antithrombin products with improved safety profiles, reducing the risk of adverse events and allergic reactions.

As antithrombin products become more effective and accessible, the demand for these therapies has grown, especially among individuals at risk of thrombotic disorders. Advancements have expanded the range of indications for antithrombin therapy, leading to its use in various clinical scenarios, including perioperative settings, pregnancy-related complications, and treatment-resistant thrombotic events. Improved manufacturing processes and formulation stability have enabled the global distribution of antithrombin products, making them more readily available to patients in different regions.

Surgical Procedures and Medical Conditions

The global antithrombin market is witnessing significant growth, driven in large part by the increasing prevalence of surgical procedures and medical conditions that heighten the risk of thrombosis. Antithrombin, a vital natural protein in the body's clotting regulation system, has emerged as a critical element in preventing blood clots during surgeries and managing thrombotic complications related to various medical conditions.

Patients undergoing surgery are often immobile for extended periods during and after the procedure, increasing the likelihood of blood stasis and clot formation. Surgical trauma can damage blood vessels, initiating the clotting process as part of the body's natural response to injury. Anesthesia can affect blood flow, further increasing the risk of clot formation. Longer surgeries carry a higher risk of clot formation due to extended

periods of immobility. Patients with preexisting medical conditions, such as cancer or cardiovascular disease, are at an elevated risk of thrombotic complications during surgery.

Antithrombin products are administered prophylactically to surgical patients to reduce the risk of postoperative blood clot formation. In certain high-risk surgeries, antithrombin may be used intraoperatively to mitigate the risk of clot formation during the procedure.

Patients with conditions like atrial fibrillation or coronary artery disease are at a higher risk of stroke and heart attack, which may necessitate antithrombin therapy. Cancer patients have an elevated risk of developing venous thromboembolism (VTE), which includes DVT and PE. Antithrombin therapy is often part of VTE management. Conditions like preeclampsia and eclampsia can lead to dangerous clotting events during pregnancy. Antithrombin products may be used in the treatment of these conditions. Some autoimmune diseases, such as antiphospholipid syndrome, can increase the risk of thrombosis, warranting antithrombin therapy.

The rising number of surgical procedures and the growing incidence of medical conditions associated with thrombosis have led to an expanded market for antithrombin products. The use of antithrombin therapy is no longer limited to just a few conditions; it has broadened to encompass a wide range of clinical scenarios. Advances in manufacturing and distribution have improved patient accessibility to antithrombin products, ensuring that they are readily available when needed.

Key Market Challenges

Limited Awareness and Diagnosis

One of the primary challenges facing the antithrombin market is the lack of awareness about thrombotic disorders. Many individuals may not be aware of the symptoms or risk factors associated with conditions like deep vein thrombosis (DVT) or pulmonary embolism (PE). This can result in delayed diagnosis and treatment, reducing the demand for antithrombin therapies.

Variability in Diagnosis and Treatment Practices

Thrombotic disorders can present differently in each patient, making diagnosis and treatment complex. Variability in diagnostic practices and treatment approaches among healthcare providers can lead to inconsistent use of antithrombin products.

Standardized guidelines and protocols are needed to ensure appropriate utilization of these therapies.

Regulatory Hurdles

The antithrombin market is subject to stringent regulatory oversight, with regulatory agencies like the U.S. Food and Drug Administration (FDA) and the European Medicines Agency (EMA) ensuring the safety and efficacy of these products. Navigating regulatory pathways and obtaining approvals for new antithrombin therapies can be time-consuming and costly, slowing down product development and market entry.

Key Market Trends

Personalized Medicine and Precision Therapeutics

One of the most significant trends in the antithrombin market is the shift towards personalized medicine. Advances in genomics and molecular diagnostics are enabling healthcare providers to tailor antithrombin therapies to individual patient profiles. This approach allows for more targeted treatments, optimized dosages, and enhanced patient outcomes.

Novel Therapeutic Indications

Antithrombin therapies are traditionally associated with thrombotic disorders such as deep vein thrombosis (DVT) and pulmonary embolism (PE). However, ongoing research is expanding the range of therapeutic indications. Antithrombin products are being explored for their potential in conditions like sepsis, liver disease, and even as adjunct therapies in cancer management.

Enhanced Formulations and Drug Delivery

Innovations in drug delivery methods and formulation technologies are expected to make antithrombin therapies more convenient and patient friendly. Long acting antithrombin products with extended half-lives are being developed, reducing the frequency of administration and improving patient compliance.

Segmental Insights

Usage Insights

Based on the category of Usage, it is anticipated that the Therapeutics Segment will dominate the market share significantly throughout the projected period. Antithrombin serves as a viable treatment option in scenarios such as cardiac surgeries and genetic conditions like hereditary antithrombin deficiency. This hereditary condition, also known as antithrombin III deficiency or AT III deficiency, puts individuals at a higher risk of developing blood clots and various heart ailments. Roughly 50% of those afflicted with hereditary antithrombin deficiency will experience one or more clotting events in their lifetime, typically occurring after adolescence, necessitating appropriate treatment with antithrombin. As a result, this segment is poised to be the driving force behind market growth during the study duration.

Moreover, ongoing research efforts into the treatment of various antithrombin deficiencies have the potential to expand the applications of various drugs and bolster market expansion over the study period. For instance, a research report published by the Thrombosis Update journal in December 2021 recommended the use of low molecular weight heparin (LMWH) in pregnancy, along with regular anti-Xa monitoring, to ensure that women receive adequate antithrombotic therapy. Given the efficacy of LMWH in activating antithrombin, individuals with antithrombin deficiency often require substantial doses of LMWH. Consequently, with these new research findings, the utilization of antithrombin drugs is expected to increase, further propelling market growth during the study period.

Type Insights

Thrombolytic drugs are poised for substantial growth in the Global Antithrombin Market during the forecast years for several compelling reasons. Firstly, ongoing advancements in medical research and technology have led to a deeper understanding of thrombotic disorders and their treatment options. This increased knowledge is likely to result in a greater utilization of thrombolytic drugs as a crucial component in the management of various thrombotic conditions, thereby driving their demand. Secondly, the rising prevalence of cardiovascular diseases and other conditions associated with abnormal blood clot formation underscores the need for effective thrombolytic therapies. As the global population ages and lifestyles evolve, the demand for these drugs is expected to surge. Additionally, regulatory approvals and endorsements from healthcare authorities for thrombolytic agents are anticipated to provide a significant boost to their market presence. Altogether, these factors are expected to fuel the growth of thrombolytic drugs in the Global Antithrombin Market during the forecast years.

Regional Insights

In the forthcoming forecast period, the Asia-Pacific region is poised to experience rapid growth. This upswing can be attributed to the burgeoning adoption of innovative medical treatments and techniques in developing nations like India and China, aimed at combatting a spectrum of diseases. The escalating disposable incomes in these emerging economies, coupled with their heightened capacity to invest in advanced healthcare solutions, create fertile ground for market opportunities in the Asia-Pacific region. Moreover, the increasing burden of an aging population, along with a rising incidence of thrombosis-related ailments and ongoing research into antithrombin deficiency within the region, is expected to be a driving force behind market growth throughout the forecast period.

Notably, the expanding elderly population in India plays a pivotal role in propelling the market in this region. According to data from the NSO, the proportion of elderly individuals in India was projected to reach 10.1% in 2021 and is forecasted to rise to 13.1% by 2031. With this demographic shift, the risk of thrombosis increases substantially, resulting in a heightened demand for antithrombin treatments, which, in turn, stimulates market growth.

Furthermore, ongoing studies focusing on antithrombin deficiency within the region are anticipated to bolster the availability and utilization of antithrombin products, further augmenting market expansion. For instance, a study published in *Frontiers in Neurology* in June 2022 highlighted the various causes of antithrombin deficiency, including inherited variants in the SERPINC1 gene. Consequently, diagnostic products such as the SERPINC1 gene test are expected to gain traction, especially in identifying the underlying causes of antithrombin deficiency-related arterial thrombosis, such as ischemic stroke. These new research endeavors pertaining to antithrombin deficiency are thus poised to boost the utilization of specific diagnostic products and contribute to market growth over the forecast period.

Key Market Players

CSL Ltd

Grifols SA

Takeda Pharmaceutical Co Ltd

Octapharma AG

LFB USA

Endpoint Health, Inc.

Siemens Healthcare GmbH

Thermo Fisher Scientific Inc

Oy Medix Biochemica Ab

Report Scope:

In this report, the Global Antithrombin Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Antithrombin Market, By Usage:

Therapeutics

Diagnostics

Research

Others

Antithrombin Market, By Source:

Human

Recombinant Goat Milk

Others

Antithrombin Market, By Type:

Anticoagulant

Antiplatelet

Thrombolytic Drugs

Antithrombin Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

United Kingdom

France

Italy

Spain

Asia-Pacific

China

Japan

India

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Antithrombin Market.

Available Customizations:

Global Antithrombin market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. GLOBAL ANTITHROMBIN MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Usage (Therapeutics, Diagnostics, Research, Others)
 - 5.2.2. By Source (Human, Recombinant Goat Milk, Others)
 - 5.2.3. By Type (Anticoagulant, Antiplatelet, Thrombolytic Drugs)

- 5.2.4. By Region
- 5.2.5. By Company (2022)
- 5.3. Product Market Map
 - 5.3.1. By Usage
 - 5.3.2. By Source
 - 5.3.3. By Type
 - 5.3.4. By Region

6. NORTH AMERICA ANTITHROMBIN MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Usage (Therapeutics, Diagnostics, Research, Others)
 - 6.2.2. By Source (Human, Recombinant Goat Milk, Others)
 - 6.2.3. By Type (Anticoagulant, Antiplatelet, Thrombolytic Drugs)
 - 6.2.4. By Country
- 6.3. North America: Country Analysis
 - 6.3.1. United States Antithrombin Market Outlook
 - 6.3.1.1. Market Size & Forecast
 - 6.3.1.1.1. By Value
 - 6.3.1.2. Market Share & Forecast
 - 6.3.1.2.1. By Usage
 - 6.3.1.2.2. By Source
 - 6.3.1.2.3. By Type
 - 6.3.2. Canada Antithrombin Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Usage
 - 6.3.2.2.2. By Source
 - 6.3.2.2.3. By Type
 - 6.3.3. Mexico Antithrombin Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Usage
 - 6.3.3.2.2. By Source
 - 6.3.3.2.3. By Type

7. EUROPE ANTITHROMBIN MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Usage (Therapeutics, Diagnostics, Research, Others)

7.2.2. By Source (Human, Recombinant Goat Milk, Others)

7.2.3. By Type (Anticoagulant, Antiplatelet, Thrombolytic Drugs)

7.2.4. By Country

7.3. Europe: Country Analysis

7.3.1. Germany Antithrombin Market Outlook

7.3.1.1. Market Size & Forecast

7.3.1.1.1. By Value

7.3.1.2. Market Share & Forecast

7.3.1.2.1. By Usage

7.3.1.2.2. By Source

7.3.1.2.3. By Type

7.3.2. United Kingdom Antithrombin Market Outlook

7.3.2.1. Market Size & Forecast

7.3.2.1.1. By Value

7.3.2.2. Market Share & Forecast

7.3.2.2.1. By Usage

7.3.2.2.2. By Source

7.3.2.2.3. By Type

7.3.3. France Antithrombin Market Outlook

7.3.3.1. Market Size & Forecast

7.3.3.1.1. By Value

7.3.3.2. Market Share & Forecast

7.3.3.2.1. By Usage

7.3.3.2.2. By Source

7.3.3.2.3. By Type

7.3.4. Italy Antithrombin Market Outlook

7.3.4.1. Market Size & Forecast

7.3.4.1.1. By Value

7.3.4.2. Market Share & Forecast

7.3.4.2.1. By Usage

7.3.4.2.2. By Source

7.3.4.2.3. By Type

7.3.5. Spain Antithrombin Market Outlook

7.3.5.1. Market Size & Forecast

7.3.5.1.1. By Value

7.3.5.2. Market Share & Forecast

7.3.5.2.1. By Usage

7.3.5.2.2. By Source

7.3.5.2.3. By Type

8. ASIA-PACIFIC ANTITHROMBIN MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Usage (Therapeutics, Diagnostics, Research, Others)

8.2.2. By Source (Human, Recombinant Goat Milk, Others)

8.2.3. By Type (Anticoagulant, Antiplatelet, Thrombolytic Drugs)

8.2.4. By Country

8.3. Asia-Pacific: Country Analysis

8.3.1. China Antithrombin Market Outlook

8.3.1.1. Market Size & Forecast

8.3.1.1.1. By Value

8.3.1.2. Market Share & Forecast

8.3.1.2.1. By Usage

8.3.1.2.2. By Source

8.3.1.2.3. By Type

8.3.2. Japan Antithrombin Market Outlook

8.3.2.1. Market Size & Forecast

8.3.2.1.1. By Value

8.3.2.2. Market Share & Forecast

8.3.2.2.1. By Usage

8.3.2.2.2. By Source

8.3.2.2.3. By Type

8.3.3. India Antithrombin Market Outlook

8.3.3.1. Market Size & Forecast

8.3.3.1.1. By Value

8.3.3.2. Market Share & Forecast

8.3.3.2.1. By Usage

8.3.3.2.2. By Source

8.3.3.2.3. By Type

- 8.3.4. Australia Antithrombin Market Outlook
 - 8.3.4.1. Market Size & Forecast
 - 8.3.4.1.1. By Value
 - 8.3.4.2. Market Share & Forecast
 - 8.3.4.2.1. By Usage
 - 8.3.4.2.2. By Source
 - 8.3.4.2.3. By Type
- 8.3.5. South Korea Antithrombin Market Outlook
 - 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value
 - 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Usage
 - 8.3.5.2.2. By Source
 - 8.3.5.2.3. By Type

9. SOUTH AMERICA ANTITHROMBIN MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Usage (Therapeutics, Diagnostics, Research, Others)
 - 9.2.2. By Source (Human, Recombinant Goat Milk, Others)
 - 9.2.3. By Type (Anticoagulant, Antiplatelet, Thrombolytic Drugs)
 - 9.2.4. By Country
- 9.3. South America: Country Analysis
 - 9.3.1. Brazil Antithrombin Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Usage
 - 9.3.1.2.2. By Source
 - 9.3.1.2.3. By Type
 - 9.3.2. Argentina Antithrombin Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Usage
 - 9.3.2.2.2. By Source
 - 9.3.2.2.3. By Type

9.3.3. Colombia Antithrombin Market Outlook

9.3.3.1. Market Size & Forecast

9.3.3.1.1. By Value

9.3.3.2. Market Share & Forecast

9.3.3.2.1. By Usage

9.3.3.2.2. By Source

9.3.3.2.3. By Type

10. MIDDLE EAST AND AFRICA ANTITHROMBIN MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Usage (Therapeutics, Diagnostics, Research, Others)

10.2.2. By Source (Human, Recombinant Goat Milk, Others)

10.2.3. By Type (Anticoagulant, Antiplatelet, Thrombolytic Drugs)

10.2.4. By Country

10.3. MEA: Country Analysis

10.3.1. South Africa Antithrombin Market Outlook

10.3.1.1. Market Size & Forecast

10.3.1.1.1. By Value

10.3.1.2. Market Share & Forecast

10.3.1.2.1. By Usage

10.3.1.2.2. By Source

10.3.1.2.3. By Type

10.3.2. Saudi Arabia Antithrombin Market Outlook

10.3.2.1. Market Size & Forecast

10.3.2.1.1. By Value

10.3.2.2. Market Share & Forecast

10.3.2.2.1. By Usage

10.3.2.2.2. By Source

10.3.2.2.3. By Type

10.3.3. UAE Antithrombin Market Outlook

10.3.3.1. Market Size & Forecast

10.3.3.1.1. By Value

10.3.3.2. Market Share & Forecast

10.3.3.2.1. By Usage

10.3.3.2.2. By Source

10.3.3.2.3. By Type

10.3.4. Kuwait Antithrombin Market Outlook

10.3.4.1. Market Size & Forecast

10.3.4.1.1. By Value

10.3.4.2. Market Share & Forecast

10.3.4.2.1. By Usage

10.3.4.2.2. By Source

10.3.4.2.3. By Type

11. MARKET DYNAMICS

11.1. Drivers

11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

12.1. Recent Development

12.2. Mergers & Acquisitions

12.3. Product Launches

13. PORTER'S FIVE FORCES ANALYSIS

13.1. Competition in the Industry

13.2. Potential of New Entrants

13.3. Power of Suppliers

13.4. Power of Customers

13.5. Threat of Substitute Products

14. COMPETITIVE LANDSCAPE

14.1. Business Overview

14.2. Product Offerings

14.3. Recent Developments

14.4. Financials (As Reported)

14.5. Key Personnel

14.6. SWOT Analysis

14.6.1. CSL Ltd

14.6.2. Grifols SA

14.6.3. Takeda Pharmaceutical Co Ltd

14.6.4. Octapharma AG

14.6.5. LFB USA

14.6.6. Endpoint Health, Inc.

14.6.7. Siemens Healthcare GmbH

14.6.8. Thermo Fisher Scientific Inc

14.6.9. Oy Medix Biochemica Ab

15. STRATEGIC RECOMMENDATIONS

16. ABOUT US & DISCLAIMER

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