

Haemophilia Treatment Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Type (Haemophilia A, Haemophilia B, Haemophilia C), By Product (Recombinant Coagulation Factor Concentrates, Plasma Derived Coagulation Factor Concentrate, Desmopressin, Antifibrinolytics Agents), By Treatment (On-demand and Prophylaxis), By Therapy (Replacement Therapy, ITI therapy and Gene Therapy), By Region and Competition

<https://marketpublishers.com/r/H023D34FFB18EN.html>

Date: October 2023

Pages: 172

Price: US\$ 4,900.00 (Single User License)

ID: H023D34FFB18EN

Abstracts

Global Haemophilia Treatment Market has valued at USD 11.89 Billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 6.27% through 2028. Hemophilia is a complex inherited medical disorder that affects the blood clotting process, leading to abnormal clot formation. This condition manifests as spontaneous and excessive bleeding, easy bruising, and prolonged oozing after injuries, surgical procedures, and dental interventions. It arises from a hereditary deficiency of specific coagulation factors, resulting in impaired blood clotting due to insufficient clotting proteins. However, with advancements in medical science, various treatment options are available. These include medications, replacement therapy, and injections of clotting factors or plasma to restore proper clot formation. The primary goal of hemophilia treatment is to replace the missing clotting proteins and effectively manage the condition to prevent complications and improve the quality of life for individuals with hemophilia.

Key Market Drivers

Increasing Predominance of Hemophilia

Hemophoresis refers to the process of blood convection or the flushing of tissues. According to the Centers for Disease Control and Prevention (CDC), hemophilia is classified as a 'hereditary bleeding disorder' that affects the proper coagulation of blood. The CDC emphasizes that this condition can result in spontaneous bleeding, injuries, and post-surgery bleeding. It is worth noting that blood contains various proteins known as coagulation factors, which play a crucial role in stopping bleeding. Individuals with hemophilia exhibit reduced levels of either factor VIII (8) or factor IX (9). The severity of hemophilia experienced by a person is directly influenced by the quantity of these factors present in their blood. The lower the amount of factor, the higher the likelihood of bleeding, which can potentially lead to significant health complications. Understanding the intricate details of hemophilia is vital in order to provide appropriate care and support to those affected by this condition.

New Products and Medication Launches

Hemophoresis, a technique used for blood convection or flushing of tissues, plays a crucial and vital role in managing certain medical conditions. In a significant and groundbreaking development, Biomarin, a leading biotechnology company, recently shared the highly anticipated outcomes of a phase III clinical trial conducted in January 2022. The trial, meticulously designed and executed, focused on evaluating the effectiveness and potential of valoctocogene oxaparvovec, a promising gene therapy, for the treatment of severe hemophilia A. This groundbreaking research not only provides hope but also brings forth new and exciting possibilities for individuals living with this challenging and life-altering condition. With the potential to revolutionize the landscape of hemophilia treatment, this breakthrough discovery marks a significant milestone in the field of medical science and paves the way for improved patient outcomes and better quality of life.

Growth in Hemophilia Inhibitors

The growth in hemophilia inhibitors is undeniably increasing the demand for hemophilia treatment, ushering in new challenges and opportunities in the field of healthcare. Hemophilia, a rare genetic disorder characterized by impaired blood clotting, has long been managed through the administration of clotting factor concentrates. However, a significant subset of hemophilia patients develops inhibitors, which are antibodies that

neutralize these clotting factors. This development complicates treatment, as conventional therapies become less effective, leading to increased bleeding episodes and a reduced quality of life for affected individuals.

The rise in hemophilia inhibitors has spurred several noteworthy developments in the realm of hemophilia treatment. First and foremost, there is an intensified need for novel treatment approaches that can effectively manage hemophilia in patients with inhibitors. Researchers and pharmaceutical companies are now focusing on the development of bypassing agents, non-factor therapies, and gene therapy as promising alternatives. These innovations offer hope for those who previously faced limited treatment options.

Surging Trend Of Prophylaxis Treatment

The surging trend of prophylaxis treatment is significantly increasing the demand for hemophilia treatment, marking a positive shift in the care and management of this complex bleeding disorder. Historically, hemophilia was often treated reactively, with clotting factor concentrates administered primarily to control bleeding episodes. However, the advent of prophylaxis, a preventive approach involving the regular infusion of clotting factors, has revolutionized the landscape of hemophilia care. Prophylactic treatment has proven to be a game-changer for individuals with hemophilia, especially those with severe forms of the condition. By providing a steady supply of clotting factors, prophylaxis helps maintain higher and more stable levels of these essential proteins in the bloodstream, significantly reducing the frequency and severity of bleeding episodes. As a result, patients experience a notably improved quality of life, reduced pain and joint damage, and a greater ability to engage in daily activities and sports.

This paradigm shift toward prophylaxis has created a growing demand for hemophilia treatment on several fronts. Firstly, the increasing recognition of its effectiveness has led to greater advocacy for its adoption among healthcare professionals, patients, and caregivers. Consequently, more individuals are seeking prophylactic treatment, which places greater pressure on healthcare systems to ensure the availability of clotting factor concentrates and appropriate care infrastructure.

Key Market Challenges

High Cost Linked with Hemophilia Treatment

The high cost associated with hemophilia treatment is a significant deterrent that is

decreasing the demand for proper care among affected individuals. Hemophilia, a rare genetic disorder characterized by impaired blood clotting, necessitates regular infusions of clotting factor concentrates or other specialized treatments to manage and prevent bleeding episodes. Unfortunately, the financial burden of these treatments can be overwhelming for patients and their families, leading to reduced access to care and suboptimal health outcomes. The cost of hemophilia treatment is multi-faceted. It encompasses not only the price of clotting factor concentrates but also expenses related to hospitalization, medical equipment, regular monitoring, and associated medications. Insurance coverage, which is essential for many patients to access treatment, may not always fully cover these expenses, leaving patients with significant out-of-pocket costs. Furthermore, the ongoing nature of hemophilia treatment compounds the financial strain, as patients require lifelong care and support.

The high cost of hemophilia treatment contributes to disparities in access to care, with some individuals facing barriers to obtaining the necessary therapies. This can lead to delayed or inadequate treatment, increasing the risk of severe bleeding episodes, joint damage, and other complications. Additionally, the financial strain can negatively impact the overall well-being of patients and their families, causing stress and anxiety.

Low Adoption Rates Of Technologically Advanced Products In Developing Countries

The low adoption rates of technologically advanced hemophilia treatment products in developing countries are significantly decreasing the overall demand for proper care among individuals affected by this rare bleeding disorder. Hemophilia management has seen remarkable advancements, including the development of recombinant clotting factor concentrates, novel therapies, and portable infusion devices. However, the accessibility and affordability of these cutting-edge treatments remain a challenge in many developing nations, leading to a widening healthcare disparity gap.

One of the primary factors contributing to the low adoption rates is the high cost associated with technologically advanced hemophilia products. These innovative treatments often come with a premium price tag, making them financially out of reach for both individuals and healthcare systems in resource-limited settings. Limited insurance coverage and public funding further exacerbate this issue, leaving many patients with traditional and less effective treatment options.

Additionally, the infrastructure required to support the administration and monitoring of advanced hemophilia treatments is often lacking in developing countries. This includes not only the availability of specialized medical personnel but also access to diagnostic

facilities and transportation for patients who need regular care. Without the necessary infrastructure, the implementation of advanced therapies becomes a formidable challenge.

Key Market Trends

Collaborative Research and Drug Development

Pharmaceutical companies have the resources and expertise to develop and manufacture novel therapies. Research institutions contribute scientific knowledge and innovation, while patient organizations provide insights into the lived experiences of individuals with hemophilia. By working together, these entities can combine their strengths to tackle complex challenges. Collaborations enable researchers to pool their knowledge and data, expediting the research process. This can lead to quicker identification of potential drug candidates, streamlined clinical trials, and faster regulatory approvals. Patient organizations represent the voices and needs of individuals living with hemophilia. Their involvement ensures that new treatments are designed with patient preferences in mind, enhancing treatment adherence and overall satisfaction.

Collaborations can facilitate patient access to clinical trials of experimental treatments. Patient organizations often play a crucial role in connecting eligible individuals with these opportunities, ensuring that clinical trial participants are representative of the patient population.

Gene Therapy Advancements

Gene therapy for hemophilia is a promising and groundbreaking area of research that holds the potential to revolutionize the treatment landscape for individuals with hemophilia. This innovative approach aims to address the root cause of the condition by introducing functional clotting factor genes into a patient's body. As gene therapy techniques become more refined and successful, they offer the possibility of not just managing hemophilia but potentially curing it, eliminating the lifelong need for clotting factor infusions. Unlike traditional treatments that manage symptoms, gene therapy seeks to modify the underlying genetic defect responsible for hemophilia. By introducing functional clotting factor genes into the body, it has the potential to restore the ability to produce clotting factors naturally. Gene therapy offers the possibility of a preventive approach to hemophilia, where patients may no longer need to worry about bleeding episodes and can lead more normal, active lives.

While gene therapy for hemophilia holds immense promise, there are still challenges to overcome, including long-term safety and durability of the treatment effects, broader accessibility, and potential immune responses to the gene therapy vectors. However, ongoing research and development efforts are aimed at addressing these challenges, and the potential for a cure for hemophilia through gene therapy is an exciting prospect that offers hope to individuals and families affected by this rare bleeding disorder.

Segmental Insights

Type Insights

In 2022, Hemophilia A emerged as the dominant player in the hemophilia market, capturing the highest share. This genetic disorder is characterized by a deficiency in blood clotting factor VIII, leading to prolonged bleeding episodes. The prevalence of hemophilia A in developed regions, coupled with supportive government initiatives, has been instrumental in driving its market dominance. Major markets such as the U.S., Europe, and Japan have witnessed the launch of innovative products, further bolstering the market position of Hemophilia A. According to a survey conducted by the World Federation of Hemophilia (WFH) in 2020, countries like the U.S., India, and Brazil have reported a significant number of Hemophilia A cases, estimated to be around 10,000. This underscores the pressing need for effective treatment and management strategies to address this complex genetic disorder.

On the other hand, Hemophilia B is expected to exhibit steady growth during the forecast period. This variant of hemophilia is characterized by a deficiency in blood clotting factor IX. The market growth of Hemophilia B can be attributed to a robust pipeline of innovative products and the advent of gene therapy. Notably, in February 2023, the European Commission granted conditional approval to CSL Behring's gene therapy Hemgenix for the treatment of Hemophilia B. This milestone approval follows the product's successful launch in the U.S. market, where it is available at a price point of USD 3.5 million for a one-time treatment. These advancements in the treatment landscape hold promising prospects for individuals living with hemophilia, offering them improved quality of life and enhanced disease management options.

Treatment Insights

Based on the type of treatment, the treatment and hemophilia market is divided into two main categories: prevention and on-demand treatment. On-demand treatment, which

involves administering medication when bleeding episodes occur, held the largest market share in 2022. However, the prevention segment is expected to experience the highest growth rate during the forecast period.

One commonly used and widely accepted form of preventive treatment is prophylaxis, which involves regular injections of coagulation factor concentrate. Prophylaxis has shown significant efficacy in managing severe hemophilia and has the potential to improve the growth rate of this market. The duration of prophylactic treatment varies depending on the severity of the patient's condition, and it aims to reduce productivity losses and enhance the overall quality of life for individuals with hemophilia.

By providing a consistent and proactive approach to managing bleeding episodes, prophylactic treatment holds promise in minimizing the impact of hemophilia on patients' daily lives. Its ability to prevent or reduce bleeding episodes not only improves physical well-being but also positively impacts emotional and social aspects of life for individuals living with this condition.

Regional Insights

In 2022, North America emerged as the dominant force in the global hemophilia treatment market, closely followed by Europe. The prevalence of hemophilia stands at approximately 134 cases per one million males in the United States. Factors such as the increasing prevalence of hemophilia, rising healthcare expenditure, growing awareness about bleeding disorders, extensive research and development in diagnostic technology and treatment, and favorable reimbursement policies contribute significantly to the growth of the hemophilia treatment market in North America. Looking ahead, Asia Pacific is projected to experience the highest growth rate in the forecast period of 2024-2028. The region's growth can be attributed to the rising incidence of hemophilia, increasing awareness about the disease, higher disposable income, and improving healthcare infrastructure. Notably, emerging economies like China and India are witnessing increased government and research institute funding for advancements in diagnostics and treatment of hemophilia, along with a growing utilization of recombinant products. These factors collectively present lucrative opportunities for the Asia Pacific market.

Key Market Players

Bayer AG

BioMarin Pharmaceutical, Inc.

CSL Behring LLC

Kedrion S.p.A

Novo Nordisk A/S

Pfizer, Inc.

Octapharma AG

Sanofi S.A.

Takeda Pharmaceutical Company

Grifols SA

Report Scope:

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

Haemophilia Treatment Market, By Type:

Haemophilia A

Haemophilia B

Haemophilia C

Haemophilia Treatment Market, By Product:

Recombinant Coagulation Factor Concentrates

Plasma Derived Coagulation Factor Concentrate

Desmopressin

Antifibrinolytics Agents

Haemophilia Treatment Market, By Treatment:

On-demand

Prophylaxis

Haemophilia Treatment Market, By Therapy:

Replacement Therapy

ITI therapy

Gene Therapy

Haemophilia Treatment Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

Competitive Landscape

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

Available Customizations:

Global Haemophilia Treatment 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).

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