

Middle East & Africa Blood Collection Devices Market Size and Forecast to 2028 - Regional Analysis by Product (Blood Collection Devices, Blood Collection Needles/holders, Blood Collection Set, and Others), Method (Manual Blood Collection and Automated Blood Collection), and End User (Hospitals & Pathology Laboratories, Blood Banks, and Others)

<https://marketpublishers.com/r/MA4631732DD4EN.html>

Date: July 2023

Pages: 205

Price: US\$ 3,000.00 (Single User License)

ID: MA4631732DD4EN

Abstracts

The Middle East & Africa blood collection devices market is expected to reach US\$ 384.85 million by 2028 from US\$ 296.00 million in 2022; it is estimated to register a CAGR of 4.5% from 2022 to 2028.

The growth of the market is attributed to the key driving factors such as the growing government support for blood test services and prevalence of blood and genetic disorders. However, problems associated with smooth collection of specimens by blood collection devices hinders the market growth.

Blood collection tubes are sterile plastic or glass tubes that collect blood, urine, and serum samples from patients to diagnose blood-related diseases. Most blood collection devices comprise an additive that either accelerates the clotting of blood (clot activator) or prevents the blood from clotting (anticoagulant). These tubes are generally used in clinical laboratories for coagulation, serology, immunology, and chemical tests. The market growth is attributable to growing government support for blood test services and prevalence of blood and genetic disorders.

Market Insights

Prevalence of Blood and Genetic Disorders

Hereditary blood disorders (HBD) are a heterogeneous group of disorders characterized by a bleeding tendency of variable severity. Blood tests are conducted to detect blood disorders. Also, Saudi Arabia has the highest autosomal recessive birth rate globally, with mutations accounting for 40% of the total mutation pool responsible for suffering from sickle cell anemia, cystic fibrosis, and Tay-Sachs disease. Further, sickle cell disease (SCD) is a common multisystem hereditary blood disorder reported in Saudi Arabia. Studies reveal that SCD accounts for 2–27% of sickle cell traits (inherited gene) as per the estimates published by the International Journal of Medicine in Developing Countries. The Saudi Premarital Screening Program also reveals that sickle cell traits account for 4.2% and 0.26% of SCD, with prevalence highest in the Eastern province, accounting for 17% for sickle cell trait and 1.2% for SCD.

The Centre for Arab Genomic Studies report also states that genetic disorders in the Kingdom of Saudi Arabia (KSA) follow the unexpected trend of predominantly recessive disease transmission among the Arab population. The two largest exome studies in KSA revealed that 71–83% of recessive mutation cases are positive for genetic disorders. Also, ~67.3% of KSA-CTGA disease records involve disorders transmitted through recessive inheritance. Autosomal and X-linked disorders, as well as disorders classified with other relatively rarely reported forms of inheritance (sporadic, mosaic, Y-linked, mitochondrial, multifactorial, digenic inheritance, and different descriptions of transmission modes of the same disease), were reported between affected families. Thus, the prevalence of blood disorders and other genetic disorders among patients accelerate the demand for blood collection devices, thereby ultimately driving market growth during the forecast period.

Based on product, the Middle East & Africa blood collection devices market is segmented as blood collection needles/holders, blood collection tubes, blood collection set, and others. The blood collection needles/holders segment held the largest market share in 2022. The blood collection tubes segment is likely to register the highest CAGR during the forecast period 2022–2028. Blood collection tubes are used to collect the desired quantity of the blood sample. These tubes are pre-sterilized containers with closure caps.

There are different variety of blood collection devices based on the content in the tubes such as anticoagulant, stabilizers, enzymes, and other reagents. The collecting tubes are available in the market in different cap collar codes such as light-blue, red, gold, green, lavender, pink, and grey depending on the additive in the tube and the type of

test procedure.

The blood collection devices are used to collect a larger quantity of blood samples. Blood collection tubes are made of various materials such as glass, plastic, and other materials. It is widely used in the clinical laboratories, hospitals, research institutes, and others.

In the past several decades, countries in the Middle East & Africa have strengthened their health systems along with upgrading public and commercial healthcare. However, the limited availability of resources, including trained staff and medical equipment, and the burden of non-communicable diseases harm the overall healthcare system in the region. In 2020, the COVID-19 pandemic significantly impacted the delivery and accessibility of social services, education, health and nutrition, healthcare spending, wellbeing, and development-related businesses. As a result of the COVID-19 crisis, the World Bank forecasts that remittances to the Middle East & Africa region are projected to fall sharply by 19.6%, after total of US\$ 42 billion in 2020, i.e., a 2.6% increase in 2019. The death pool of ill patients in low-cost regions is expected to rise because healthcare professionals have limited their patients checking as many hospitals have limited resources and staff.

The rising rate of SARS-CoV-2 increased stress on the region's healthcare system, raising the demand for diagnostic tests such as blood tests or antibody tests in its healthcare system, supporting the growth of the market in this region. In June 2020, two of the largest private hospital groups in the UAE rolled out FDA-authorized COVID-19 serology tests available to the public. Thus, aforementioned factors are have had positive impact on the market.

Based on product, the Middle East & Africa blood collection devices market is segmented into blood collection needles/holders, blood collection tubes, blood collection set, and others. The blood collection needles/holders segment held the largest market share in 2022. The blood collection tubes segment is likely to register the highest CAGR during the forecast period 2022–2028.

Based on method, the Middle East & Africa blood collection devices market is bifurcated into manual blood collection and automated blood collection. The manual blood collection segment held a larger market share in 2021. The automated blood collection segment is expected to register a higher CAGR during the forecast period.

In terms of end user, the Middle East & Africa blood collection devices market is

categorized into hospitals & pathology laboratories, blood banks, and others. The hospitals & pathology laboratories segment held the largest share for Middle East & Africa blood collection tubes market share in 2022 and is expected to register highest CAGR during the forecast period.

A few of the primary and secondary sources referred to while preparing the report on the Middle East & Africa blood collection devices market are the Association of Research-Based Pharmaceutical Companies, Emirates International Accreditation Center, European Federation of Pharmaceutical Industries and Associations, and Dubai Health Authority.

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Figure 38. Rest of Middle East & Africa Blood Collection Devices Market – Revenue and Forecast to 2028 (US\$ Million)

Figure 39. Impact of COVID-19 Pandemic on Middle East & Africa Country Markets

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