Leukapheresis - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Leukapheresis Market size is estimated at USD 69.77 billion in 2024, and is expected to reach USD 98.55 billion by 2029, growing at a CAGR of 7.15% during the forecast period (2024-2029).

Key Highlights
-COVID-19 impacted the leukapheresis market due to disruption in non-essential procedures like leukapheresis, reduced availability of donors, and delayed clinical trials in order to increase focus on COVID-19-related research. For instance, as per an article published in January 2022 in BioMed Research Journal, blood donation dropped by 40% to 67% during the initial year of the pandemic in regions where travel restrictions were in place.
-Hence, owing to the factors mentioned above, COVID-19 had a significant impact on the studied market. However, the market is re-gaining its pre-pandemic nature regarding the demand for leukapheresis procedures, which in turn is expected to boost the utilization of leukapheresis devices. Furthermore, due to the increasing prevalence of leukemia and the growing demand for leukopaks in clinical research activities, the market is believed to witness significant growth over the forecast period.
-The rising incidence of leukemia disorders is expected to boost the demand by increasing the usage rates of leukapheresis machines and kits. For instance, according to the Leukemia Foundation 2022 update, an expected 19,403 Australians were diagnosed with a blood cancer such as leukemia, lymphoma, and myeloma in 2022. This was equivalent to 53 people per day or one person every 27 minutes. The same source stated that 135,000 people were living with blood cancer in Australia in 2022, and more than 275,000 Australians are expected to be living with blood cancer by 2035.
-Additionally, as per the report published by Blood Cancer UK in August 2022, blood cancer is the fifth most common cancer in the United Kingdom, with over 41,000 people being diagnosed with it every year. Hence, the rising burden of leukemia and blood cancer is creating the need for advanced therapeutics based on leukapheresis for treatment, which is expected to drive the market's growth over the forecast period.

-Furthermore, an article published in July 2021 in the International Journal of General Medicine stated that leukapheresis has emerged as one of the most essential adjuvant therapies to treat hyperleukocytosis, particularly in patients who were not unsuitable to cytoreduce with Ara-C or hydroxyurea. Leukapheresis is frequently used to treat a variety of illnesses. It is also employed for diagnostic purposes because it can boost the production of circulating tumor cells. The high number of research studies on leukapheresis is expected to propel the market growth during the forecast period.
-The rising company initiatives, such as product launches and technological advancements, are also contributing to growth in the leukapheresis market. For instance, in July 2021, Terumo Blood and Cell Technologies announced a direct offering for physicians to perform extracorporeal photopheresis immunotherapy (ECP) procedures at the patient's bedside. The company has expanded the functionality of Spectra Optia. The UVA PIT System ECP can now be performed using these devices as a functionally closed, online, multistep system with mononuclear cell collection (MNC) and continuous mononuclear cell collection (CMNC) protocols.
-Similarly, in June 2022, Terumo reported that the United States National Health Service (NHS) England acquired the Terumo's Spectra Optia Apheresis System to treat sickle cell disease. Such developments to increase the offerings of leukapheresis for healthcare professionals are expected to propel the market growth.
-Therefore, owing to the aforementioned factors, such as the high burden of blood cancer and rising strategic initiatives by market players for technological advancements and launches in leukapheresis, the studied market is anticipated to witness growth over the analysis period. However, the high cost of therapeutic leukapheresis and stringent regulatory issues for donor recruitment are expected to hinder the growth of the market during the forecast period.

Leukapheresis Market Trends

Apheresis Device Segment is Expected to Hold a Significant Share in the Leukapheresis Market

- Apheresis devices are used to collect and separate blood components for therapeutic and donation procedures. The devices are built with some safety units, such as an optical fluid level detector, ultrasonic air-bubble detectors, dry heat fluid warmers, and pressure sensors.
- According to an October 2022 article published by the Association for the Advancement of Blood & Biotherapies, the field of regenerative medicine is growing, which uses apheresis on a large scale to isolate blood cells and store them for therapeutic purposes. The need for apheresis collection in the United States may nearly triple, from about 43,000 annual collections in 2021 to 132,000 by 2025, according to forecast estimates. Thus, the high demand for apheresis is expected to propel the utility of apheresis devices during the forecast period.
- Additionally, according to a research study published in the International Journal of Molecular Sciences in August 2021, platelet-rich plasma (PRP) from apheresis increases the proliferation and differentiation of pre-osteocyte cells through the release of growth factors from platelets. Hence, the research studies indicating high usage of apheresis for the extraction of PRP used in treating various therapeutic conditions are expected to propel the segment growth during the forecast period.
- The expansion of key market players and partnership with various government bodies is another reason for the market's growth. For instance, in June 2022, National Health Service (NHS) England selected Terumo's Spectra Optia Apheresis System as Part of the MedTech Funding Mandate for the Expansion of Sickle Cell Disease Treatment. As a result of the partnership, Spectra Optia is likely to be used more widely in hospitals across England, enabling sickle cell disease patients to have improved access to this life-changing treatment. Hence, due to such partnerships, which strengthen the company's market position, along with rising technological advancements, the apheresis device segment is expected to witness growth during the forecast period.

North America is Expected to Hold a Significant Market Share Over The Forecast Period

- North America is expected to hold a significant share of the leukapheresis market due to the rising geriatric population and increasing prevalence and incidence of leukemia in the region.
- According to the American Cancer Society (ACS) Cancer Statistics 2023, 59,610 new cases of leukemia and 89,380 new cases of lymphoma are estimated to be diagnosed in the United States in 2023. The high burden of these cancers is expected to boost the demand for leukapheresis to rapidly reduce the number of circulating leukemic and lymphoma cells in the blood, thereby accelerating market growth.
- Moreover, recent developments by market players are increasing market growth. For instance, in June 2021, OrganaBio, LLC launched adult peripheral blood-derived products, including vialed peripheral blood mononuclear cells (PBMCs) and whole leukopaks. These products contain high concentrations of peripheral blood mononuclear cells (PBMCs), such as T cells, NK cells, B cells, and monocytes, which are essential raw materials for immunotherapy research and allogeneic cell therapy development and manufacturing. The launch of innovative products such as leukoplakias for R&D is expected to propel the demand for leukapheresis used in the diagnosis and treatment of blood cancer and various immunological diseases, which will further augment the market growth in the region during the forecast period.

Leukapheresis Industry Overview

The leukapheresis market is consolidated and consists of a few major players. A few major players dominate the market in terms of market share. New product developments, acquisitions, and strategic alliances are some strategies adopted by industry players. Some companies currently dominating the market are Asahi Kasei Medical Co. Ltd, Haemonetics Corporation, Terumo BCT Inc., STEMCELL Technologies Inc., Macopharma, Fresenius SE & Co. KGaA, HemaCare, Key Biologics LLC, AllCells, and StemExpress.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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