Global Market Study on Bone Marrow Transplant: Latin America to Register Highest Growth Rate by 2021, Owing to Increasing Density of Bone Marrow Transplant Centers

Description: Bone marrow transplant or hematopoietic stem cell transplant is the surgical procedure to replace impaired bone marrow tissue or bone marrow stem cells with healthy ones. Bone marrow transplant procedure is recommended to treat severe stages of leukemia, Hodgkin and non-Hodgkin lymphomas, multiple myeloma, aplastic and sickle cell anemia, thalassemia etc. As per transplant activity report 2009-2013 from the Center for International Bone and Marrow Transplant Research (CIBMTR), of a total of 88,063 bone marrow transplant procedures performed in the U.S., over 57% procedures were autologous bone marrow transplant procedures.

The report covers the global bone marrow transplant market performance in terms of volume (procedural count) and revenue contribution. The report includes key trends, drivers, restraints, and opportunities influencing the growth of the global bone marrow transplant market over the forecast period. Impact analysis of key growth drivers and restraints, based on the weighted average model, are included to provide clients with crystal clear decision-making insights.

The global bone marrow transplant market growth is mainly driven by factors such as growing prevalence of blood cancers across the globe, expansion of bone marrow transplant registry, growing investment in logistic services, and improvement in survival rate after treatment. Substantially high cost of treatment, lack of reimbursement policies in developing regions, and low availability of bone marrow donors are some factors hampering the growth of the global bone marrow transplant market.

Based on procedure type, the bone marrow transplant market is segmented into autologous bone marrow transplant and allogeneic bone marrow transplant segments. By volume, the autologous bone marrow transplant segment accounted for the major proportion of the overall market share in 2014 and is expected to remain the dominant segment in terms of volume during the forecast period.

By disease indication, the global bone marrow transplant market is classified as leukemia, lymphoma, myeloma, myelodysplasia, myeloproliferative neoplasms, aplastic anemia, solid tumors, sickle cell anemia, thalassemia, and others. The leukemia segment is expected to dominate the market, accounting for a maximum share of the overall market by 2021 end; whereas, revenue from the thalassemia segment is projected to expand at the highest CAGR of 8.9% during the forecast period.

On the basis of the end user, the global bone marrow transplant market is segmented into hospitals, multispecialty clinics, and ambulatory surgical centers (ASC). The hospital end user segment is expected to continue to be dominant, reaching a value of US$ 9,607.4 Mn by 2021 end. In terms of volume, adoption of bone marrow transplant procedures in ambulatory surgical centers is expected to increase by 1.3X globally over the forecast period.

By region, the market in Europe is expected to be dominant in the global bone marrow transplant market in terms of volume throughout the forecast period. North America and Latin America markets are expected to gain significant market share over the forecast period, due to increasing ratio of BMT specialists to that of bone marrow transplant seeking patients in these regions. The MEA market is expected to witness sluggish growth during the forecast period partly due to the relatively low presence of bone marrow transplant centers.

Key market players covered in this report include Lonza Group Ltd., Merck Millipore Corporation, Sanofi-Aventis LLC, AllCells LLC, STEMCELL Technologies and American Type Culture Collection (ATCC) Inc. Major players in the bone marrow transplant market are focusing on emerging markets instead of mature markets such as North America and Europe. These companies are more focused towards expanding their presence in clinical applications by introducing stem cell therapy products for use in humans.

The global bone marrow transplant market is segmented as follows:
By Procedure:
Autologous Bone Marrow Transplant
Allogeneic Bone Marrow Transplant

By Disease Indication:
Leukemia
Lymphoma
Myeloma
Myelodysplasia
Myeloproliferative Neoplasms
Aplastic Anemia
Solid tumors
Sickle cell Anemia
Thalassemia
Others

By End User:
Hospitals
Multispecialty Clinics
Ambulatory Surgical Centers

By Region:
North America
U.S.
Canada
Europe
Germany
Italy
France
U.K.
Spain
Rest of Europe
Asia Pacific
China
India
Japan
Australia & New Zealand
Rest of Asia Pacific
Latin America
Mexico
Brazil
Argentina
Rest of Latin America
MEA
GCC Countries
South Africa
Rest of MEA

Key features included in this report:
Drivers and restraints of the bone marrow transplant market
Pipeline analysis and key developments in the market
Analysis of business strategies of key players
Bone marrow transplant market estimates and forecast

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