

Market Assessment of Immunoglobulins in Rare Disease Segment

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Who we are....

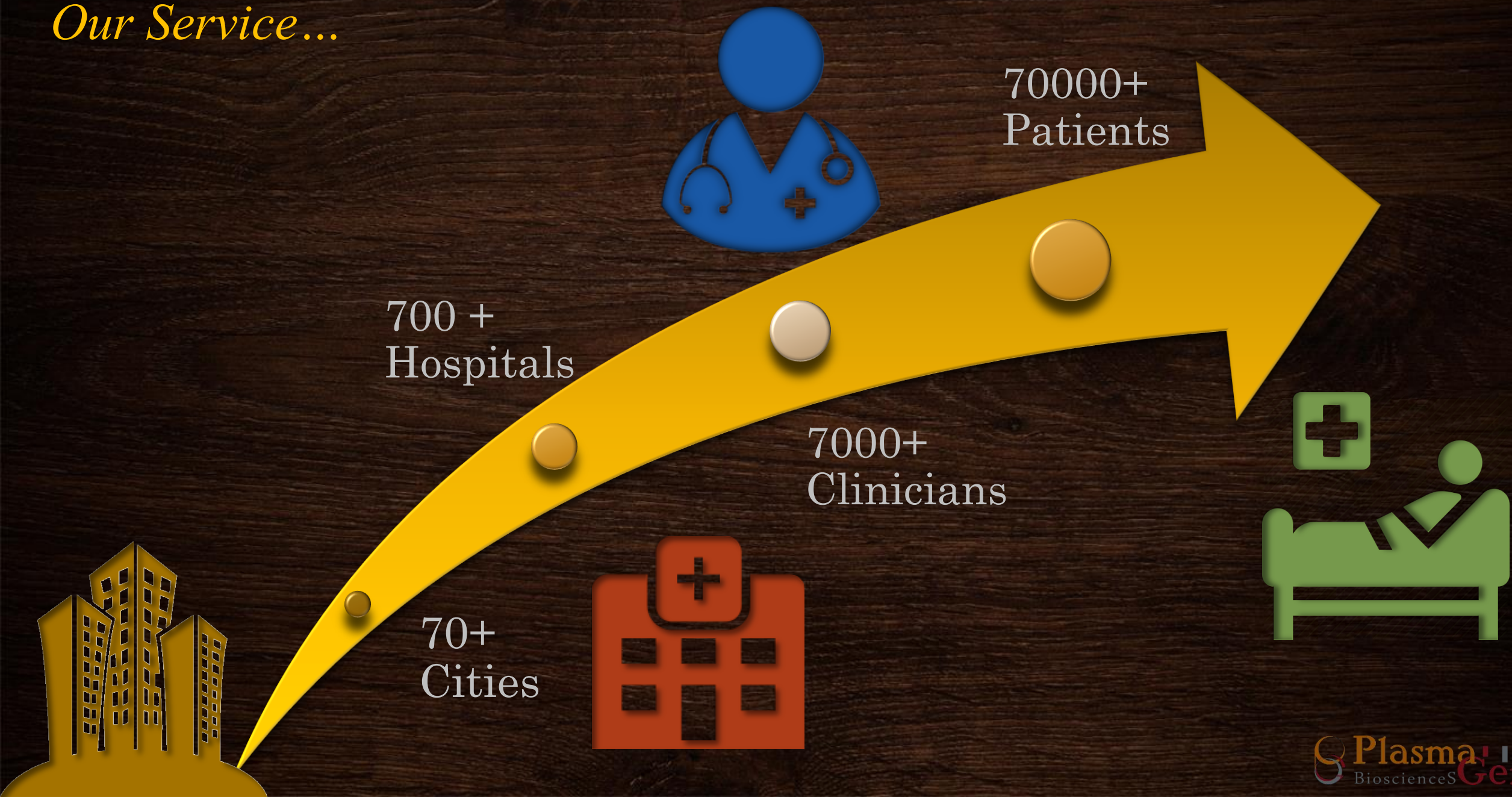
PlasmaGen BioSciences is Indian Biopharmaceutical organization specializing in Plasma Protein Therapy and dedicated towards improving the health and quality of life of patients in India and SAARC regions.

What we do....

Our Vision, Mission & Values....



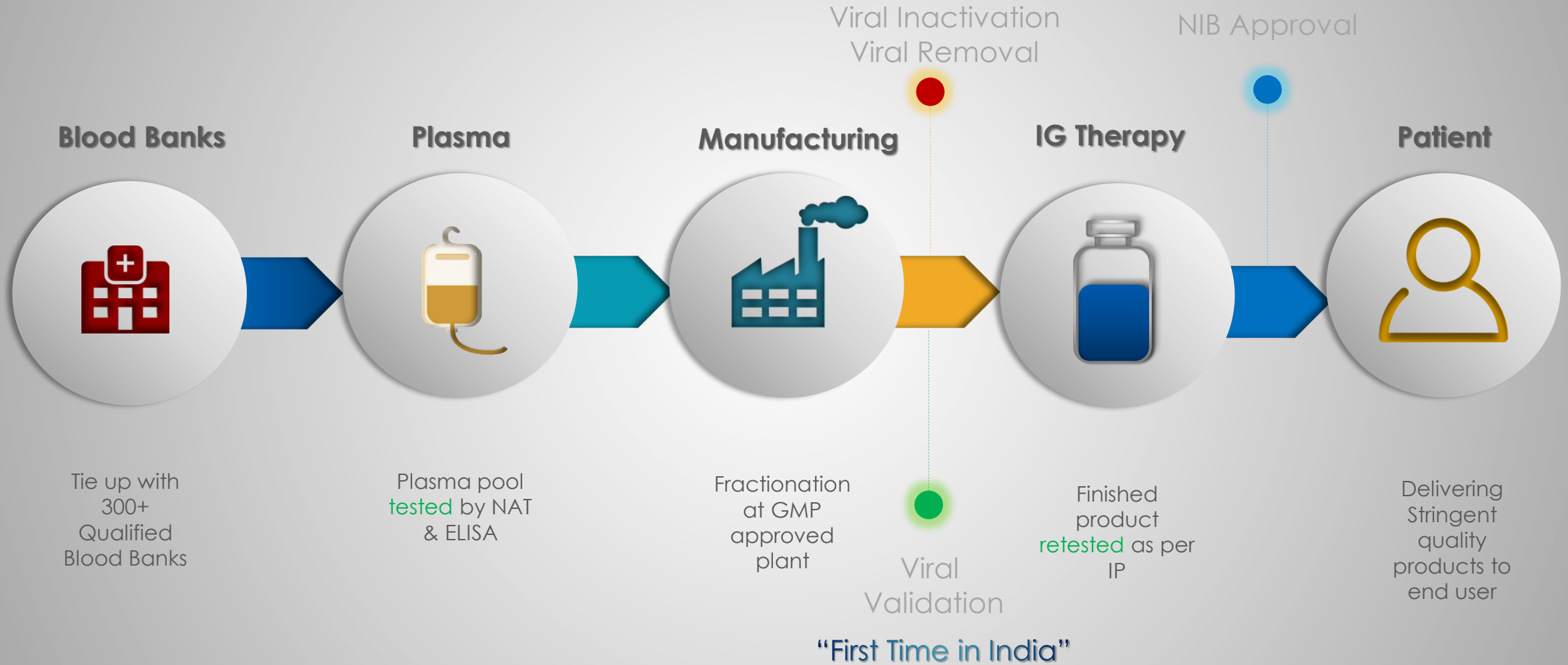
Our Service...

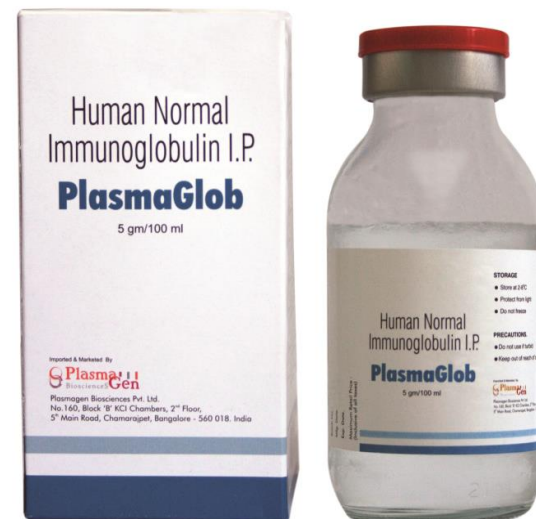
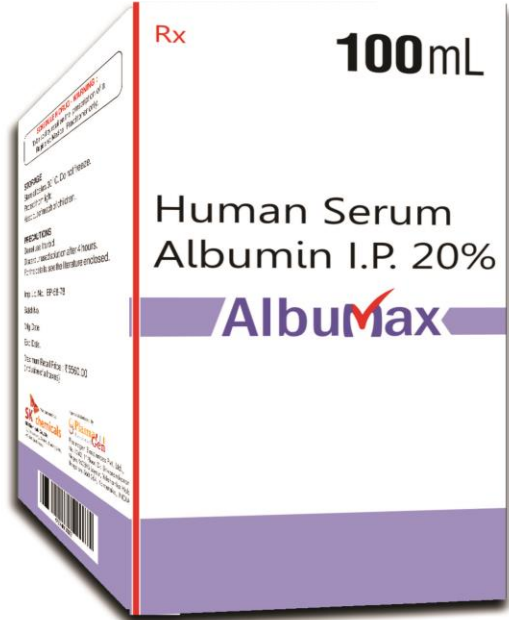




PLASMA PRODUCTS

Safety & Efficacy





Quality
Safety
Purity



IVIIG Indications

- 1.Primary Immunodeficiency Diseases (PID)
- 2.Idiopathic Thrombocytopenic Purpura (ITP)
- 3.Chronic Lymphocytic Leukemia (CLL)
- 4.Chronic Inflammatory Demyelinating Polyneuropathy (CIDP)
- 5.Kawasaki Disease (KD)
- 6.Guillian-Barren Syndrome (GBS)



RESEARCH METHODOLOGY



OBJECTIVES

1. To study the Global growth pattern of the products based on plasma derived therapeutic proteins.

- **Scope of study:**

- To understand growth of the product based on plasma derived therapeutic proteins & its indications.
- To study the current scenario of product based on plasma derived therapeutic proteins & its future markets.

OBJECTIVES

2. To study the Indian scenario on protein treatments and new headways during this remedial zone.

- **Scope of study:**
- To comprehend the market chiefs and their share of the overall industry in local market.
- To study the new advancements in the immunoglobulin therapy area.



- **Study span:** 3 Months
- **Data types:** Quantitative and Qualitative data
- **Information Collection Tool:** Secondary Data gathered (Company Annual Reports, different research articles and distributions). Information was triangulated utilizing auxiliary methodology.
- **Secondary Data:** the ensuing are a few different ways of gathering optional information –
 - Books
 - Records • Biographies
 - Newspapers
 - Published censuses or other measurable information
 - Data files
 - Internet articles
 - Research articles by different scientists
 - Databases, and so on.



Ethical Consideration

- This research was completed with the appropriate research guidelines .
- Enough time was given to the respondent of the study do that they can depict their true view on research questions.
- Data was not manipulated from the secondary research , I had taken the exact figures from the resources
- The disclosure of respondent identity was based on their permission where if they are not willing to disclose identity, their identity was exhibited.



GLOBAL PLASMA MARKET

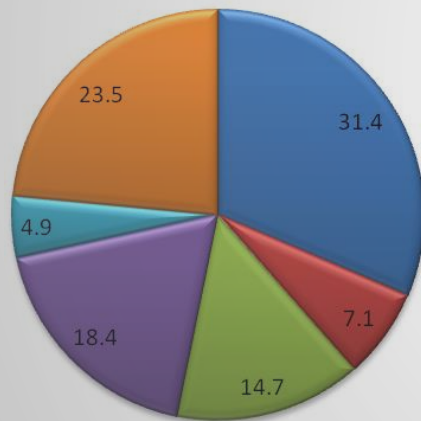
Global IVIG market ~\$10bn



India accounts for merely ~0.5% of the world Immunoglobulin market share

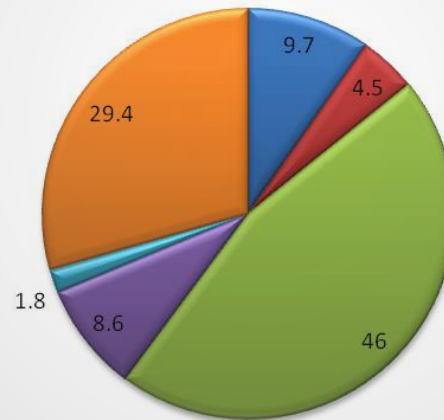
Worldwide Market for Plasma Proteins

- Global Plasma Therapeutics Market: > US \$ 20 billion
- Top three market by value: USA > China > Germany
- Top four plasma products by value: IgG> Albumin> pd-F-VIII> C-1 esterase inhibitor
- IgG sales expected growth rate - 6–8% annually



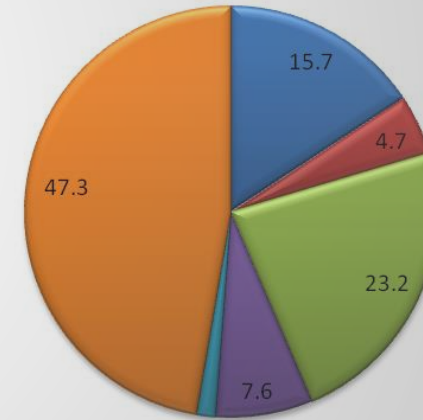
Total Market- \$4806.8 million

1996



Total Market- \$11780.5 million

2008



Total Market- \$21174.0 million

2016

■ Albumin
■ Hyperimmune (IM and IV)
■ All others
■ Factor VIII
■ Factor IX
■ polyvalent IVIG/SCIG

History of Plasma Fractionation in India

KEM-Mumbai



National Plasma
Fractionation Center
10,000L/ annum

1990s

2009

Reliance



~100,000 L/ Annum



100,000 L/ Annum

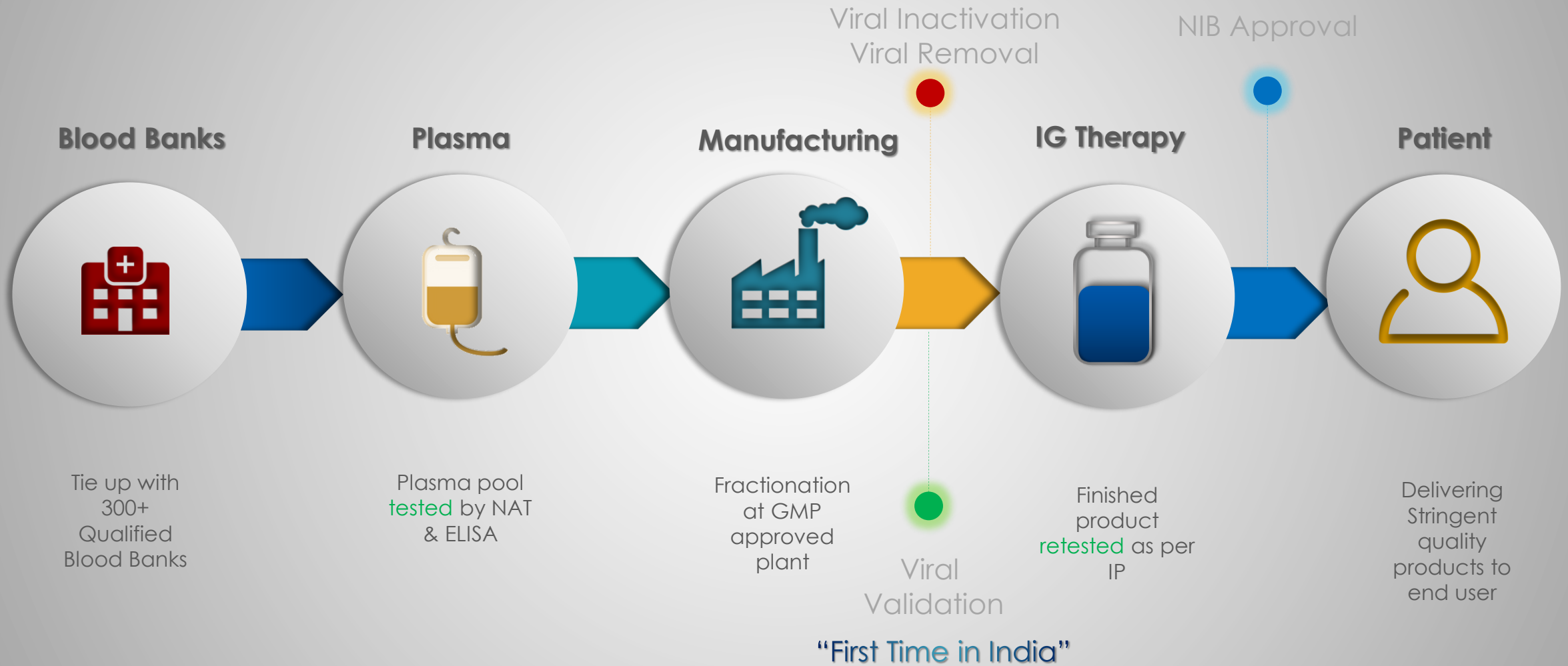
2013

2019

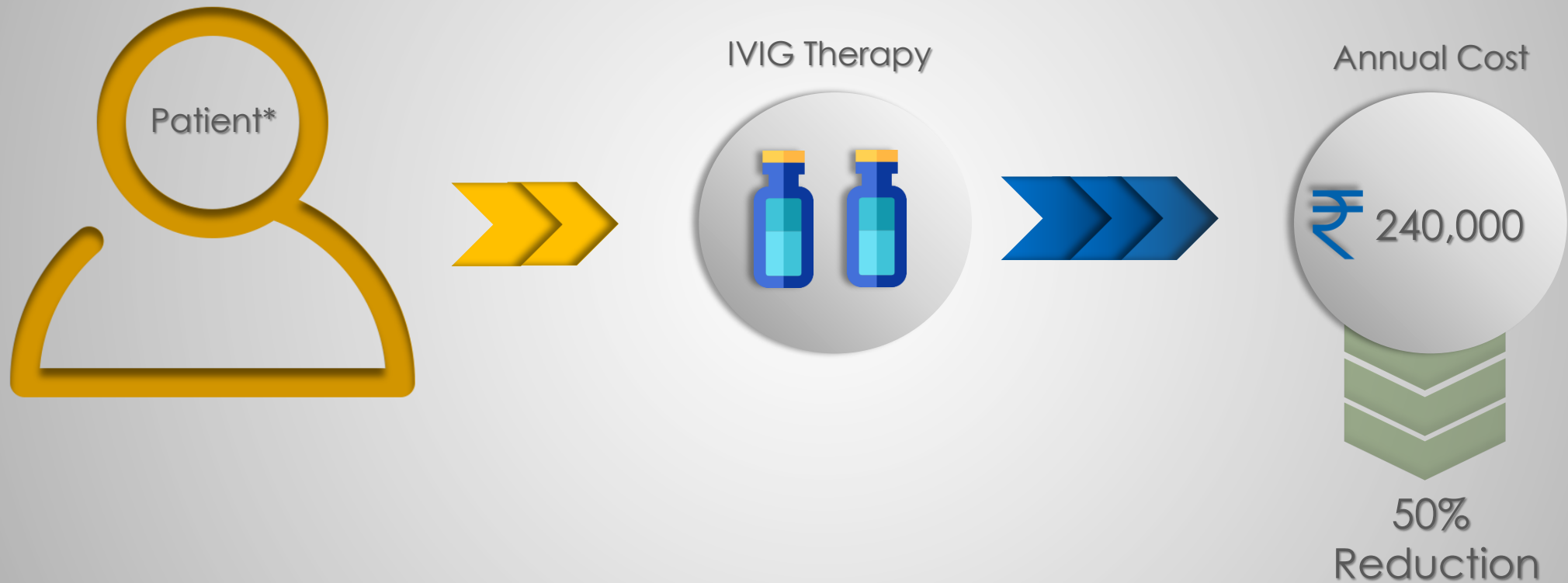
300,000L/ Annum



Safety & Efficacy



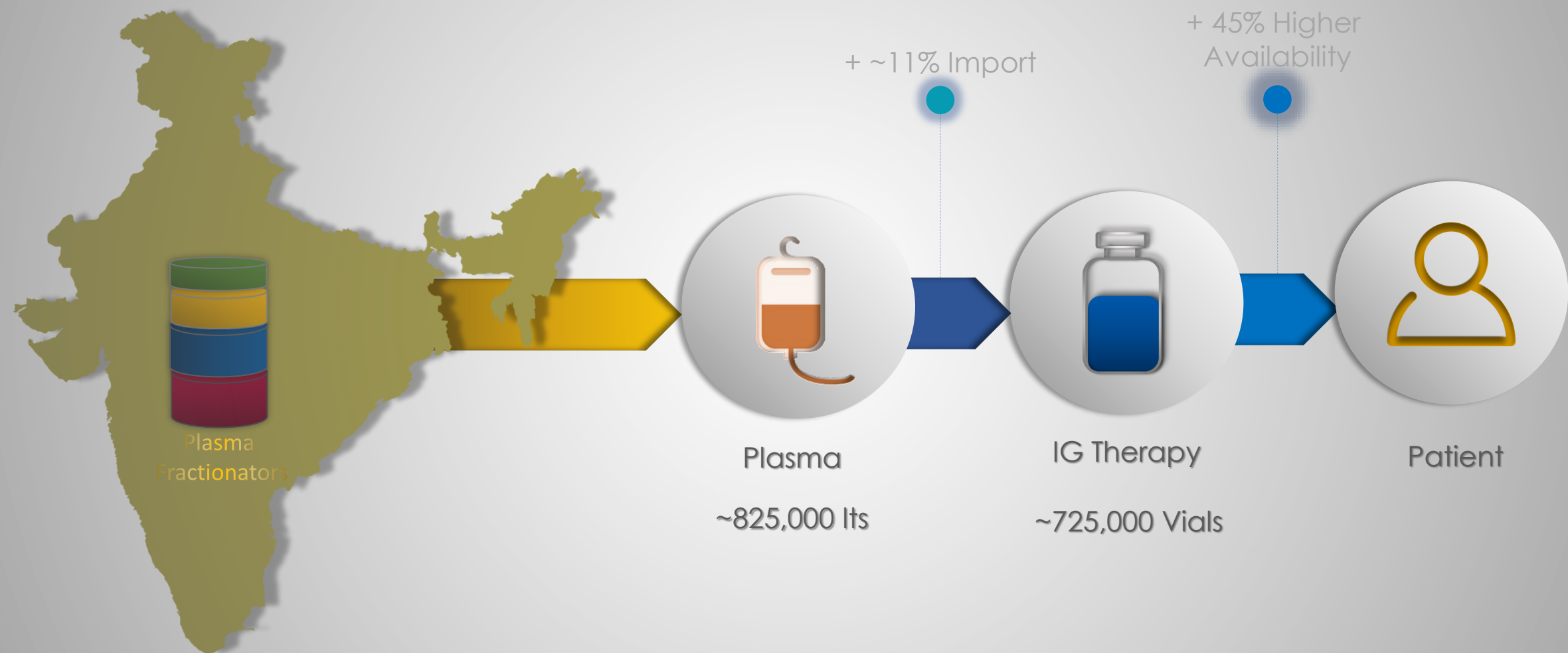
Cost of IVIG Therapy for patient:



Plasma Fractionators in India



Current Status of IG Therapy-2019



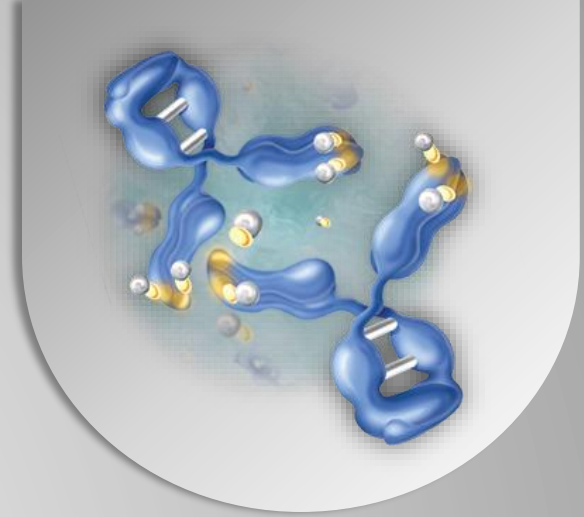
Accessibility of IVIG



IVIG & the Future....

Proline as an Excipient

- Reduced IgG aggregation
- Reduced dimer formation
- Minimized fragmentation
- Prevention of solution discoloration
- Room-temperature storage



Limitations of IVIG

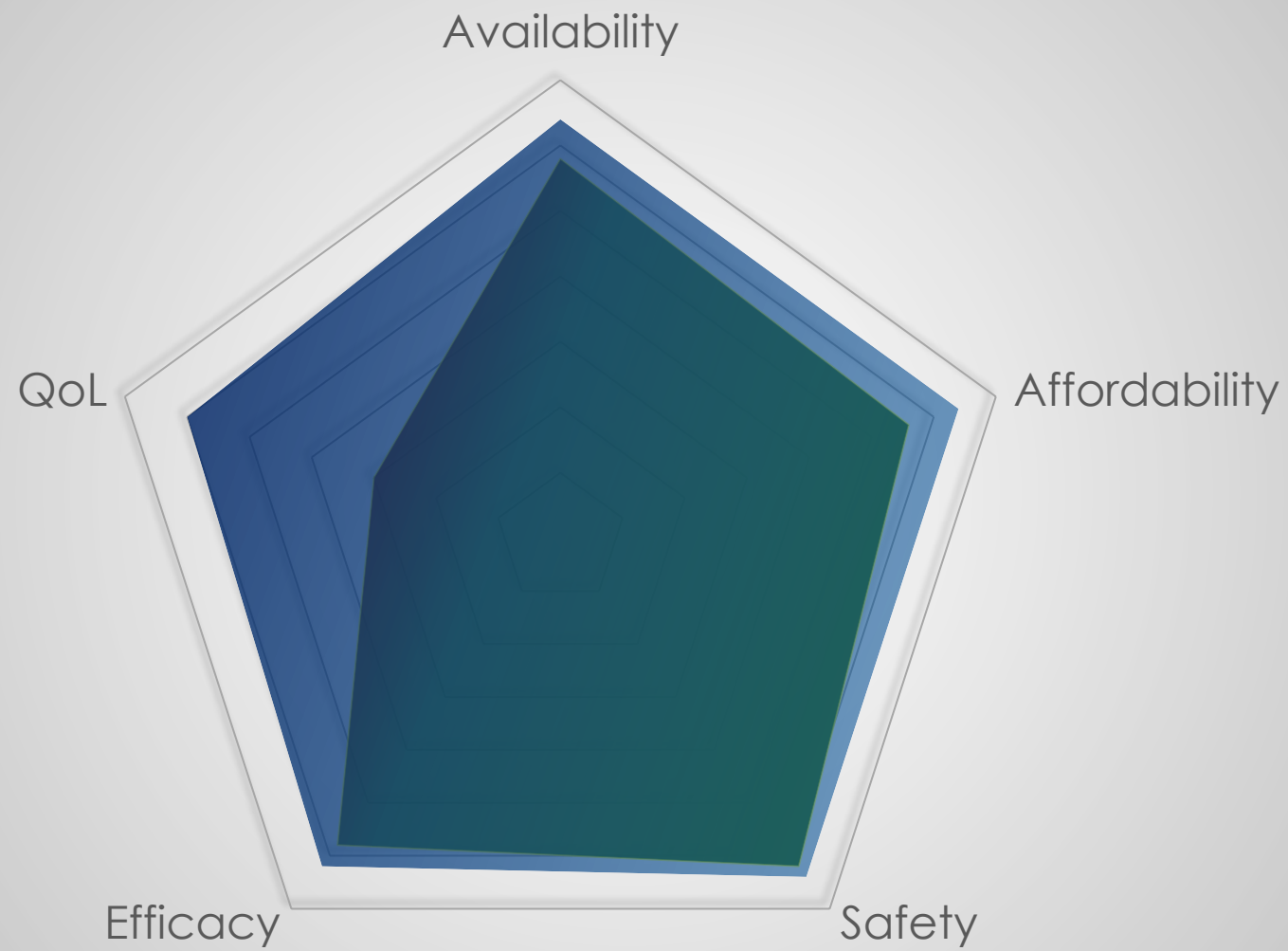
- Difficulty for those with poor venous access
- Patients with recurrent systemic reactions
- Requires hospitalization or a good home-care programme

SCIG (Subcutaneous Immunoglobulin)

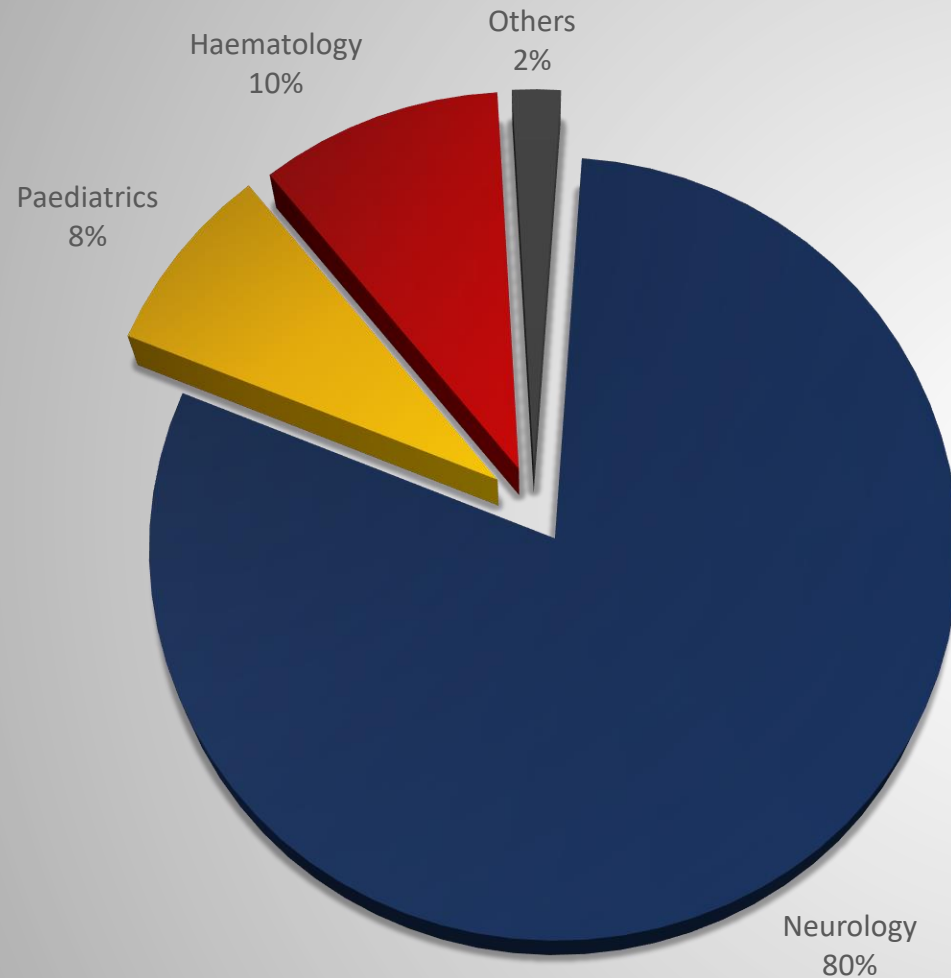
- The need for premedication with corticosteroids and anti-histamines is reduced
- The technique is easy to learn and can be performed even by children and elderly patients
- For most patients, self-administration results in improved convenience, better quality of life (QoL) and fewer absences from work



The 5 pillars



IVIIG usage in Specialities*



GBS- Guillain Barre Syndrome
 CIDP- Chronic Inflammatory Demyelinating Polyneuropathy
 ITP- Immune Thrombocytopenic Purpura
 KD- Kawasaki Disease
 PID- Primary Immunodeficiency

*Industry Source (Annual usage)

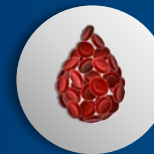
IVIIG usage in Patients*

GBS/CIDP



~16000

ITP



~5000

KD



~2500

PID



<1000

Indian Market for Plasma Products contd.,

Intravenous IVIG	
Manufacturer	Brands
Reliance	IMMUNOREL
Intas	Globucel / Gamaren
Plasmagen	PLASMAGLOB
Virchow	Vimmune
Biocon	IVINEX SAFE
Hemarus	IMMUGLO
Bharat Serum	GAMMA IV
VHB	IVGLOB EX
Emcure	Emuglobulin
Zydus	Zymoglobulin
Others	Fusion, India Bulls

Outcomes of the Study

- Highest number of market share in terms of percentage is contributed by the **Reliance 39%** the on subsequently Intas comes on second place **Intas** which contributes **around 32%**.
- **PlasmaGen contributes around 18%** of market share in immunoglobulins market.
- Bharat serum contributes around 5-7% in the market. 3% of market share is hold by Biocon and the others
- The global IVIG market by indications in the upcoming year. Major part **19%** has been occupied by the **hypogammaglobulinemia** and **17% contributes chronic inflammatory demyelinating polyneuropathy**. whereas **12% contributes to the congenital acquired immune deficiency syndrome**.
- Whereas hypogammaglobulinemia and chronic inflammatory demyelinating polyneuropathy are high in comparison to other indications.



Recommendation

- An appropriate advertising plan must be developed to **increase awareness** of the use of plasma products. The advertising plan must be focused; and must address the main problem of the target customer through the organization of seminars, conferences etc. Target customers need to be aware of the benefits of plasma products.
- Hematologists, neurologists and oncologists use this product in newer and less frequent indications. Therefore, plasma products must be actively promoted for this area of specialist doctors. **Medical literature** must be available for doctors to inform them of the latest advances in the use of plasma products in more recent indications.
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- **Target customers must be correctly identified** and characterized based on heavy, moderate and low users.
- Price is an important criterion for the success of a brand, so the price must also be **economical because** many doctors depend on the price factor when prescribing drugs, especially in public hospitals.

CONCLUSION



Price of the Product



Lack of data Availability in this segment



Lack of diseases Diagnosis

VISITING CARDS



thank you!