

Global Blood Component Separation Bags Market Growth 2026-2032

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Abstracts

The global Blood Component Separation Bags market size is predicted to grow from US\$ 213 million in 2025 to US\$ 297 million in 2032; it is expected to grow at a CAGR of 4.9% from 2026 to 2032.

Blood Component Separation Bags are sterile, disposable, flexible medical containers designed for the separation, transfer, aliquoting, temporary storage and processing of human blood components, including red blood cells, plasma and platelets. The market primarily covers standalone transfer bags and satellite bags integrated into double, triple, quadruple or other multiple blood bag systems. Products are generally manufactured from medical-grade PVC or alternative blood-compatible polymers and can be differentiated by plasticizer system, including conventional DEHP PVC, non-DEHP PVC and non-PVC materials. Typical nominal capacities range from below 300 mL to above 500 mL, while configuration, tubing, ports, material compatibility and storage requirements vary by target blood component. ISO 3826-1 specifies performance requirements for sterile collapsible plastic containers used for the collection, storage, processing, transport and separation of human blood and blood components and explicitly covers multiple-unit container systems. This study focuses on blood component separation and transfer bags supplied to blood centers, blood banks, hospitals and other blood-processing facilities.

Key Findings The global manufacturing-level average selling price was approximately US\$1.43 per unit in 2025. Integrated satellite bags remain the leading product form. Blood centers and blood banks are the largest end users. PVC remains the mainstream material, while non-DEHP PVC and non-PVC materials are the main upgrade directions. Rising blood component preparation rates in developing markets are a key source of incremental demand.

Market Trends

The market is moving from basic PVC transfer bags toward safer material systems, more standardized closed processing configurations and higher compatibility with automated blood-component preparation. Non-DEHP PVC, alternative plasticizers and selected non-PVC materials are gaining attention as blood services and healthcare institutions place greater emphasis on material safety, component-specific storage performance and regulatory compliance. At the same time, product development is becoming more closely integrated with complete blood-processing workflows, including sterile tubing connections, satellite-bag configurations and component-specific storage requirements.

Another important trend is the increasing industrialization of blood-bag manufacturing in Asia. Large-scale manufacturing capacity already exists across Japan, China, India, South Korea and Taiwan. Terumo Penpol reports annual capacity of 40 million single-bag equivalents at its blood bag factory in India, while Macopharma reports 20.4 million blood kits and three production sites globally. This scale creates strong cost pressure in standard PVC products while encouraging established suppliers to differentiate through material systems, integrated configurations and quality consistency.

Market Dynamics

Drivers

The fundamental demand driver is the continued use of component therapy rather than whole-blood transfusion. WHO reports approximately 120.4 million blood donations globally and shows that 98% of blood collected in high-income countries and 94% in upper-middle-income countries is separated into components, compared with 81% in lower-middle-income and 52% in low-income countries. This gap creates a clear structural demand opportunity as blood-service infrastructure improves in emerging markets. Rising requirements for red blood cell, plasma and platelet preparation also support recurring consumption of satellite and transfer bags.

Restraints

The market is constrained by its mature product base, strong price competition and the procurement power of centralized blood-service organizations. Standard PVC separation bags are relatively commoditized, particularly in high-volume public tenders. In addition, donor volumes in many developed markets are relatively stable, limiting

underlying unit growth. Manufacturers therefore face pressure to improve productivity while maintaining stringent requirements for sterility, blood compatibility, leakage resistance, tubing integrity and batch consistency.

Opportunities

The most attractive opportunities lie in non-DEHP material conversion, platelet-compatible bags, specialized transfer bags and emerging-market component-processing penetration. Lower-income markets still show substantially lower blood-component separation rates than developed countries, leaving room for demand growth as blood-bank infrastructure and clinical transfusion practice improve. Suppliers capable of combining reliable high-volume manufacturing with compliant material platforms and broader blood-processing portfolios are better positioned to benefit from these upgrades.

Challenges

The industry faces strict regulatory qualification requirements and long customer validation cycles because product failure directly affects blood safety and component quality. Material substitution is also technically demanding: changing plasticizers or moving away from PVC can alter gas permeability, flexibility, storage performance and compatibility with different blood components. At the same time, suppliers must balance increasingly complex technical requirements against the low unit price and tender-driven nature of the market.

Industry Chain Analysis

The upstream industry mainly includes medical-grade PVC and alternative polymer resins, plasticizers, tubing materials, ports, connectors, packaging materials and sterilization-related inputs. Midstream manufacturers convert these materials into sterile standalone transfer bags and integrated satellite bags through film processing, bag forming, sealing, tubing assembly, inspection, sterilization and quality-control processes. Downstream demand is concentrated in blood centers, blood banks, hospital transfusion departments and specialized blood-processing facilities. Because blood bags are high-volume regulated consumables, manufacturing automation, cleanroom control, sealing consistency and supply reliability are major determinants of competitiveness.

Value Chain Analysis

Raw materials account for a meaningful share of manufacturing cost, but value creation is increasingly determined by medical-grade formulation, blood compatibility, sterile manufacturing, validated bag design and regulatory qualification rather than by polymer resin alone. Standard DEHP PVC products occupy the lower price band, while non-DEHP materials, specialty platelet bags and higher-specification configurations can command higher selling prices. The average global manufacturing ASP of approximately US\$1.43 per piece in 2025 therefore represents a blended level across a highly differentiated product mix rather than a uniform market price.

Segment Insights

By system configuration, Integrated Satellite Bags represent the largest segment because component preparation is commonly carried out with double, triple, quadruple and other multiple blood bag systems. Standalone Transfer Bags form a distinct market for sterile transfer, aliquoting and additional processing. By material system, DEHP PVC remains the largest established category, while Non-DEHP PVC Bags are the most visible upgrade route. By target blood component, red blood cell, plasma and platelet bags require different storage and material performance characteristics, with platelet applications generally demanding more specialized gas-permeability performance.

Downstream Market Opportunities

Blood centers and blood banks offer the largest recurring demand because component separation is performed systematically and at high volume. Hospitals represent another important market, particularly for secondary transfer, aliquoting and component handling. The strongest incremental demand potential is in regions where blood collection is already expanding but the share processed into components remains below levels seen in mature healthcare systems. Improvements in component-therapy penetration can increase bag consumption even without equivalent growth in total blood donations.

Regional Insights

Asia is the most important manufacturing base, supported by large-scale production networks in Japan, China and India and additional manufacturing capacity in South Korea and Taiwan. The region combines global-scale suppliers with numerous cost-competitive regional manufacturers. North America and Europe remain important high-value consumption markets because blood-component processing rates are already very high and regulatory requirements favor established validated supply chains.

Emerging markets in Asia, the Middle East, Africa and Latin America offer stronger long-term volume potential where blood-service infrastructure and component separation continue to develop. WHO data demonstrate that the difference in blood-component processing penetration between high-income and low-income countries remains substantial.

Competitive Landscape Analysis

The competitive structure is regionally differentiated. Japan and Europe have relatively concentrated supplier bases with long-established blood-processing technology and strong regulatory capabilities. China and India have broader manufacturing ecosystems and stronger cost competitiveness, particularly in conventional PVC and multiple blood bag systems. South Korea and Taiwan have smaller but technically capable domestic manufacturing bases. Overall competition is shifting from simple bag-manufacturing scale toward a combination of material safety, component-specific performance, automated production, product consistency and ability to supply integrated blood-processing systems. Large production capacities also create high entry barriers for new suppliers seeking to compete in standardized high-volume tenders.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the "Blood Component Separation Bags Industry Forecast" looks at past sales and reviews total world Blood Component Separation Bags sales in 2025, providing a comprehensive analysis by region and market sector of projected Blood Component Separation Bags sales for 2026 through 2032. With Blood Component Separation Bags sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Blood Component Separation Bags industry.

This Insight Report provides a comprehensive analysis of the global Blood Component Separation Bags landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Blood Component Separation Bags portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Blood Component Separation Bags market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Blood Component Separation Bags and breaks down the

forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Blood Component Separation Bags.

This report presents a comprehensive overview, market shares, and growth opportunities of Blood Component Separation Bags market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

DEHP Bags

PVC Bags

Others

Segmentation by Target Blood Component:

Red Blood Cell Bags

Plasma Bags

Platelet Bags

General Purpose Transfer Bags

Others

Segmentation by Nominal Capacity:

Below 300 mL

300 to 500 mL

Above 500 mL

Segmentation by Application:

Blood Centers and Blood Banks

Hospitals

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Terumo Corporation

Fresenius Kabi AG

Macopharma

Haemonetics Corporation

JMS Co., Ltd.

SB KAWASUMI LABORATORIES, INC.

WEGO Medical

Sichuan Nigale Biotechnology Co., Ltd.

Poly Medicure Limited

Mitra Industries Private Limited

HLL Lifecare Limited

INNVOL Medical India Limited

SURU International Private Limited

Nan Ya Plastics Corporation

BOEN Healthcare Co., Ltd.

C.Y. Medical Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Blood Component Separation Bags market?

What factors are driving Blood Component Separation Bags market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Blood Component Separation Bags market opportunities vary by end market size?

How does Blood Component Separation Bags break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global Blood Component Separation Bags Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for Blood Component Separation Bags by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for Blood Component Separation Bags by Country/Region, 2021, 2025 & 2032
- 2.2 Blood Component Separation Bags Segment by Type
 - 2.2.1 DEHP Bags
 - 2.2.2 PVC Bags
 - 2.2.3 Others
 - 2.2.4 Blood Component Separation Bags Sales by Type
 - 2.2.4.1 Global Blood Component Separation Bags Sales Market Share by Type (2021-2026)
 - 2.2.4.2 Global Blood Component Separation Bags Revenue and Market Share by Type (2021-2026)
 - 2.2.4.3 Global Blood Component Separation Bags Sale Price by Type (2021-2026)
- 2.3 Blood Component Separation Bags Segment by Target Blood Component
 - 2.3.1 Red Blood Cell Bags
 - 2.3.2 Plasma Bags
 - 2.3.3 Platelet Bags
 - 2.3.4 General Purpose Transfer Bags
 - 2.3.5 Others
 - 2.3.6 Blood Component Separation Bags Sales by Target Blood Component
 - 2.3.6.1 Global Blood Component Separation Bags Sales Market Share by Target

Blood Component (2021-2026)

2.3.6.2 Global Blood Component Separation Bags Revenue and Market Share by Target Blood Component (2021-2026)

2.3.6.3 Global Blood Component Separation Bags Sale Price by Target Blood Component (2021-2026)

2.4 Blood Component Separation Bags Segment by Nominal Capacity

2.4.1 Below 300 mL

2.4.2 300 to 500 mL

2.4.3 Above 500 mL

2.4.4 Blood Component Separation Bags Sales by Nominal Capacity

2.4.4.1 Global Blood Component Separation Bags Sales Market Share by Nominal Capacity (2021-2026)

2.4.4.2 Global Blood Component Separation Bags Revenue and Market Share by Nominal Capacity (2021-2026)

2.4.4.3 Global Blood Component Separation Bags Sale Price by Nominal Capacity (2021-2026)

2.5 Blood Component Separation Bags Segment by Application

2.5.1 Blood Centers and Blood Banks

2.5.2 Hospitals

2.5.3 Others

2.5.4 Blood Component Separation Bags Sales by Application

2.5.4.1 Global Blood Component Separation Bags Sale Market Share by Application (2021-2026)

2.5.4.2 Global Blood Component Separation Bags Revenue and Market Share by Application (2021-2026)

2.5.4.3 Global Blood Component Separation Bags Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Blood Component Separation Bags Breakdown Data by Company

3.1.1 Global Blood Component Separation Bags Annual Sales by Company (2021-2026)

3.1.2 Global Blood Component Separation Bags Sales Market Share by Company (2021-2026)

3.2 Global Blood Component Separation Bags Annual Revenue by Company (2021-2026)

3.2.1 Global Blood Component Separation Bags Revenue by Company (2021-2026)

3.2.2 Global Blood Component Separation Bags Revenue Market Share by Company

(2021-2026)

3.3 Global Blood Component Separation Bags Sale Price by Company

3.4 Key Manufacturers Blood Component Separation Bags Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Blood Component Separation Bags Product Location Distribution

3.4.2 Players Blood Component Separation Bags Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR BLOOD COMPONENT SEPARATION BAGS BY GEOGRAPHIC REGION

4.1 World Historic Blood Component Separation Bags Market Size by Geographic Region (2021-2026)

4.1.1 Global Blood Component Separation Bags Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Blood Component Separation Bags Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Blood Component Separation Bags Market Size by Country/Region (2021-2026)

4.2.1 Global Blood Component Separation Bags Annual Sales by Country/Region (2021-2026)

4.2.2 Global Blood Component Separation Bags Annual Revenue by Country/Region (2021-2026)

4.3 Americas Blood Component Separation Bags Sales Growth

4.4 APAC Blood Component Separation Bags Sales Growth

4.5 Europe Blood Component Separation Bags Sales Growth

4.6 Middle East & Africa Blood Component Separation Bags Sales Growth

5 AMERICAS

5.1 Americas Blood Component Separation Bags Sales by Country

5.1.1 Americas Blood Component Separation Bags Sales by Country (2021-2026)

5.1.2 Americas Blood Component Separation Bags Revenue by Country (2021-2026)

5.2 Americas Blood Component Separation Bags Sales by Type (2021-2026)

5.3 Americas Blood Component Separation Bags Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Blood Component Separation Bags Sales by Region

6.1.1 APAC Blood Component Separation Bags Sales by Region (2021-2026)

6.1.2 APAC Blood Component Separation Bags Revenue by Region (2021-2026)

6.2 APAC Blood Component Separation Bags Sales by Type (2021-2026)

6.3 APAC Blood Component Separation Bags Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Blood Component Separation Bags by Country

7.1.1 Europe Blood Component Separation Bags Sales by Country (2021-2026)

7.1.2 Europe Blood Component Separation Bags Revenue by Country (2021-2026)

7.2 Europe Blood Component Separation Bags Sales by Type (2021-2026)

7.3 Europe Blood Component Separation Bags Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Blood Component Separation Bags by Country

8.1.1 Middle East & Africa Blood Component Separation Bags Sales by Country (2021-2026)

8.1.2 Middle East & Africa Blood Component Separation Bags Revenue by Country (2021-2026)

8.2 Middle East & Africa Blood Component Separation Bags Sales by Type (2021-2026)

8.3 Middle East & Africa Blood Component Separation Bags Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Blood Component Separation Bags

10.3 Manufacturing Process Analysis of Blood Component Separation Bags

10.4 Industry Chain Structure of Blood Component Separation Bags

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Blood Component Separation Bags Distributors

11.3 Blood Component Separation Bags Customer

12 WORLD FORECAST REVIEW FOR BLOOD COMPONENT SEPARATION BAGS BY GEOGRAPHIC REGION

12.1 Global Blood Component Separation Bags Market Size Forecast by Region

12.1.1 Global Blood Component Separation Bags Forecast by Region (2027-2032)

12.1.2 Global Blood Component Separation Bags Annual Revenue Forecast by Region (2027-2032)

- 12.2 Americas Forecast by Country (2027-2032)
- 12.3 APAC Forecast by Region (2027-2032)
- 12.4 Europe Forecast by Country (2027-2032)
- 12.5 Middle East & Africa Forecast by Country (2027-2032)
- 12.6 Global Blood Component Separation Bags Forecast by Type (2027-2032)
- 12.7 Global Blood Component Separation Bags Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Terumo Corporation

- 13.1.1 Terumo Corporation Company Information
- 13.1.2 Terumo Corporation Blood Component Separation Bags Product Portfolios and Specifications
- 13.1.3 Terumo Corporation Blood Component Separation Bags Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.1.4 Terumo Corporation Main Business Overview
- 13.1.5 Terumo Corporation Latest Developments

13.2 Fresenius Kabi AG

- 13.2.1 Fresenius Kabi AG Company Information
- 13.2.2 Fresenius Kabi AG Blood Component Separation Bags Product Portfolios and Specifications
- 13.2.3 Fresenius Kabi AG Blood Component Separation Bags Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.2.4 Fresenius Kabi AG Main Business Overview
- 13.2.5 Fresenius Kabi AG Latest Developments

13.3 Macopharma

- 13.3.1 Macopharma Company Information
- 13.3.2 Macopharma Blood Component Separation Bags Product Portfolios and Specifications
- 13.3.3 Macopharma Blood Component Separation Bags Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.3.4 Macopharma Main Business Overview
- 13.3.5 Macopharma Latest Developments

13.4 Haemonetics Corporation

- 13.4.1 Haemonetics Corporation Company Information
- 13.4.2 Haemonetics Corporation Blood Component Separation Bags Product Portfolios and Specifications
- 13.4.3 Haemonetics Corporation Blood Component Separation Bags Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.4.4 Haemonetics Corporation Main Business Overview
- 13.4.5 Haemonetics Corporation Latest Developments
- 13.5 JMS Co., Ltd.
 - 13.5.1 JMS Co., Ltd. Company Information
 - 13.5.2 JMS Co., Ltd. Blood Component Separation Bags Product Portfolios and Specifications
 - 13.5.3 JMS Co., Ltd. Blood Component Separation Bags Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.5.4 JMS Co., Ltd. Main Business Overview
 - 13.5.5 JMS Co., Ltd. Latest Developments
- 13.6 SB KAWASUMI LABORATORIES, INC.
 - 13.6.1 SB KAWASUMI LABORATORIES, INC. Company Information
 - 13.6.2 SB KAWASUMI LABORATORIES, INC. Blood Component Separation Bags Product Portfolios and Specifications
 - 13.6.3 SB KAWASUMI LABORATORIES, INC. Blood Component Separation Bags Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.6.4 SB KAWASUMI LABORATORIES, INC. Main Business Overview
 - 13.6.5 SB KAWASUMI LABORATORIES, INC. Latest Developments
- 13.7 WEGO Medical
 - 13.7.1 WEGO Medical Company Information
 - 13.7.2 WEGO Medical Blood Component Separation Bags Product Portfolios and Specifications
 - 13.7.3 WEGO Medical Blood Component Separation Bags Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.7.4 WEGO Medical Main Business Overview
 - 13.7.5 WEGO Medical Latest Developments
- 13.8 Sichuan Nigale Biotechnology Co., Ltd.
 - 13.8.1 Sichuan Nigale Biotechnology Co., Ltd. Company Information
 - 13.8.2 Sichuan Nigale Biotechnology Co., Ltd. Blood Component Separation Bags Product Portfolios and Specifications
 - 13.8.3 Sichuan Nigale Biotechnology Co., Ltd. Blood Component Separation Bags Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.8.4 Sichuan Nigale Biotechnology Co., Ltd. Main Business Overview
 - 13.8.5 Sichuan Nigale Biotechnology Co., Ltd. Latest Developments
- 13.9 Poly Medicure Limited
 - 13.9.1 Poly Medicure Limited Company Information
 - 13.9.2 Poly Medicure Limited Blood Component Separation Bags Product Portfolios and Specifications
 - 13.9.3 Poly Medicure Limited Blood Component Separation Bags Sales, Revenue,

Price and Gross Margin (2021-2026)

13.9.4 Poly Medicure Limited Main Business Overview

13.9.5 Poly Medicure Limited Latest Developments

13.10 Mitra Industries Private Limited

13.10.1 Mitra Industries Private Limited Company Information

13.10.2 Mitra Industries Private Limited Blood Component Separation Bags Product

Portfolios and Specifications

13.10.3 Mitra Industries Private Limited Blood Component Separation Bags Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 Mitra Industries Private Limited Main Business Overview

13.10.5 Mitra Industries Private Limited Latest Developments

13.11 HLL Lifecare Limited

13.11.1 HLL Lifecare Limited Company Information

13.11.2 HLL Lifecare Limited Blood Component Separation Bags Product Portfolios and Specifications

13.11.3 HLL Lifecare Limited Blood Component Separation Bags Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 HLL Lifecare Limited Main Business Overview

13.11.5 HLL Lifecare Limited Latest Developments

13.12 INNVOL Medical India Limited

13.12.1 INNVOL Medical India Limited Company Information

13.12.2 INNVOL Medical India Limited Blood Component Separation Bags Product Portfolios and Specifications

13.12.3 INNVOL Medical India Limited Blood Component Separation Bags Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 INNVOL Medical India Limited Main Business Overview

13.12.5 INNVOL Medical India Limited Latest Developments

13.13 SURU International Private Limited

13.13.1 SURU International Private Limited Company Information

13.13.2 SURU International Private Limited Blood Component Separation Bags Product Portfolios and Specifications

13.13.3 SURU International Private Limited Blood Component Separation Bags Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 SURU International Private Limited Main Business Overview

13.13.5 SURU International Private Limited Latest Developments

13.14 Nan Ya Plastics Corporation

13.14.1 Nan Ya Plastics Corporation Company Information

13.14.2 Nan Ya Plastics Corporation Blood Component Separation Bags Product Portfolios and Specifications

13.14.3 Nan Ya Plastics Corporation Blood Component Separation Bags Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 Nan Ya Plastics Corporation Main Business Overview

13.14.5 Nan Ya Plastics Corporation Latest Developments

13.15 BOEN Healthcare Co., Ltd.

13.15.1 BOEN Healthcare Co., Ltd. Company Information

13.15.2 BOEN Healthcare Co., Ltd. Blood Component Separation Bags Product Portfolios and Specifications

13.15.3 BOEN Healthcare Co., Ltd. Blood Component Separation Bags Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 BOEN Healthcare Co., Ltd. Main Business Overview

13.15.5 BOEN Healthcare Co., Ltd. Latest Developments

13.16 C.Y. Medical Co., Ltd.

13.16.1 C.Y. Medical Co., Ltd. Company Information

13.16.2 C.Y. Medical Co., Ltd. Blood Component Separation Bags Product Portfolios and Specifications

13.16.3 C.Y. Medical Co., Ltd. Blood Component Separation Bags Sales, Revenue, Price and Gross Margin (2021-2026)

13.16.4 C.Y. Medical Co., Ltd. Main Business Overview

13.16.5 C.Y. Medical Co., Ltd. Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Blood Component Separation Bags Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Blood Component Separation Bags Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of DEHP Bags

Table 4. Major Players of PVC Bags

Table 5. Major Players of Others

Table 6. Global Blood Component Separation Bags Sales by Type (2021-2026) & (K Units)

Table 7. Global Blood Component Separation Bags Sales Market Share by Type (2021-2026)

Table 8. Global Blood Component Separation Bags Revenue by Type (2021-2026) & (\$ million)

Table 9. Global Blood Component Separation Bags Revenue Market Share by Type (2021-2026)

Table 10. Global Blood Component Separation Bags Sale Price by Type (2021-2026) & (US\$/Unit)

Table 11. Major Players of Red Blood Cell Bags

Table 12. Major Players of Plasma Bags

Table 13. Major Players of Platelet Bags

Table 14. Major Players of General Purpose Transfer Bags

Table 15. Major Players of Others

Table 16. Global Blood Component Separation Bags Sales by Target Blood Component (2021-2026) & (K Units)

Table 17. Global Blood Component Separation Bags Sales Market Share by Target Blood Component (2021-2026)

Table 18. Global Blood Component Separation Bags Revenue by Target Blood Component (2021-2026) & (\$ million)

Table 19. Global Blood Component Separation Bags Revenue Market Share by Target Blood Component (2021-2026)

Table 20. Global Blood Component Separation Bags Sale Price by Target Blood Component (2021-2026) & (US\$/Unit)

Table 21. Major Players of Below 300 mL

Table 22. Major Players of 300 to 500 mL

Table 23. Major Players of Above 500 mL

Table 24. Global Blood Component Separation Bags Sales by Nominal Capacity (2021-2026) & (K Units)

Table 25. Global Blood Component Separation Bags Sales Market Share by Nominal Capacity (2021-2026)

Table 26. Global Blood Component Separation Bags Revenue by Nominal Capacity (2021-2026) & (\$ million)

Table 27. Global Blood Component Separation Bags Revenue Market Share by Nominal Capacity (2021-2026)

Table 28. Global Blood Component Separation Bags Sale Price by Nominal Capacity (2021-2026) & (US\$/Unit)

Table 29. Global Blood Component Separation Bags Sale by Application (2021-2026) & (K Units)

Table 30. Global Blood Component Separation Bags Sale Market Share by Application (2021-2026)

Table 31. Global Blood Component Separation Bags Revenue by Application (2021-2026) & (\$ million)

Table 32. Global Blood Component Separation Bags Revenue Market Share by Application (2021-2026)

Table 33. Global Blood Component Separation Bags Sale Price by Application (2021-2026) & (US\$/Unit)

Table 34. Global Blood Component Separation Bags Sales by Company (2021-2026) & (K Units)

Table 35. Global Blood Component Separation Bags Sales Market Share by Company (2021-2026)

Table 36. Global Blood Component Separation Bags Revenue by Company (2021-2026) & (\$ millions)

Table 37. Global Blood Component Separation Bags Revenue Market Share by Company (2021-2026)

Table 38. Global Blood Component Separation Bags Sale Price by Company (2021-2026) & (US\$/Unit)

Table 39. Key Manufacturers Blood Component Separation Bags Producing Area Distribution and Sales Area

Table 40. Players Blood Component Separation Bags Products Offered

Table 41. Blood Component Separation Bags Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 42. New Products and Potential Entrants

Table 43. Market M&A Activity & Strategy

Table 44. Global Blood Component Separation Bags Sales by Geographic Region (2021-2026) & (K Units)

Table 45. Global Blood Component Separation Bags Sales Market Share Geographic Region (2021-2026)

Table 46. Global Blood Component Separation Bags Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 47. Global Blood Component Separation Bags Revenue Market Share by Geographic Region (2021-2026)

Table 48. Global Blood Component Separation Bags Sales by Country/Region (2021-2026) & (K Units)

Table 49. Global Blood Component Separation Bags Sales Market Share by Country/Region (2021-2026)

Table 50. Global Blood Component Separation Bags Revenue by Country/Region (2021-2026) & (\$ millions)

Table 51. Global Blood Component Separation Bags Revenue Market Share by Country/Region (2021-2026)

Table 52. Americas Blood Component Separation Bags Sales by Country (2021-2026) & (K Units)

Table 53. Americas Blood Component Separation Bags Sales Market Share by Country (2021-2026)

Table 54. Americas Blood Component Separation Bags Revenue by Country (2021-2026) & (\$ millions)

Table 55. Americas Blood Component Separation Bags Sales by Type (2021-2026) & (K Units)

Table 56. Americas Blood Component Separation Bags Sales by Application (2021-2026) & (K Units)

Table 57. APAC Blood Component Separation Bags Sales by Region (2021-2026) & (K Units)

Table 58. APAC Blood Component Separation Bags Sales Market Share by Region (2021-2026)

Table 59. APAC Blood Component Separation Bags Revenue by Region (2021-2026) & (\$ millions)

Table 60. APAC Blood Component Separation Bags Sales by Type (2021-2026) & (K Units)

Table 61. APAC Blood Component Separation Bags Sales by Application (2021-2026) & (K Units)

Table 62. Europe Blood Component Separation Bags Sales by Country (2021-2026) & (K Units)

Table 63. Europe Blood Component Separation Bags Revenue by Country (2021-2026) & (\$ millions)

Table 64. Europe Blood Component Separation Bags Sales by Type (2021-2026) & (K

Units)

Table 65. Europe Blood Component Separation Bags Sales by Application (2021-2026) & (K Units)

Table 66. Middle East & Africa Blood Component Separation Bags Sales by Country (2021-2026) & (K Units)

Table 67. Middle East & Africa Blood Component Separation Bags Revenue Market Share by Country (2021-2026)

Table 68. Middle East & Africa Blood Component Separation Bags Sales by Type (2021-2026) & (K Units)

Table 69. Middle East & Africa Blood Component Separation Bags Sales by Application (2021-2026) & (K Units)

Table 70. Key Market Drivers & Growth Opportunities of Blood Component Separation Bags

Table 71. Key Market Challenges & Risks of Blood Component Separation Bags

Table 72. Key Industry Trends of Blood Component Separation Bags

Table 73. Blood Component Separation Bags Raw Material

Table 74. Key Suppliers of Raw Materials

Table 75. Blood Component Separation Bags Distributors List

Table 76. Blood Component Separation Bags Customer List

Table 77. Global Blood Component Separation Bags Sales Forecast by Region (2027-2032) & (K Units)

Table 78. Global Blood Component Separation Bags Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 79. Americas Blood Component Separation Bags Sales Forecast by Country (2027-2032) & (K Units)

Table 80. Americas Blood Component Separation Bags Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 81. APAC Blood Component Separation Bags Sales Forecast by Region (2027-2032) & (K Units)

Table 82. APAC Blood Component Separation Bags Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 83. Europe Blood Component Separation Bags Sales Forecast by Country (2027-2032) & (K Units)

Table 84. Europe Blood Component Separation Bags Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 85. Middle East & Africa Blood Component Separation Bags Sales Forecast by Country (2027-2032) & (K Units)

Table 86. Middle East & Africa Blood Component Separation Bags Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 87. Global Blood Component Separation Bags Sales Forecast by Type (2027-2032) & (K Units)

Table 88. Global Blood Component Separation Bags Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 89. Global Blood Component Separation Bags Sales Forecast by Application (2027-2032) & (K Units)

Table 90. Global Blood Component Separation Bags Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 91. Terumo Corporation Basic Information, Blood Component Separation Bags Manufacturing Base, Sales Area and Its Competitors

Table 92. Terumo Corporation Blood Component Separation Bags Product Portfolios and Specifications

Table 93. Terumo Corporation Blood Component Separation Bags Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 94. Terumo Corporation Main Business

Table 95. Terumo Corporation Latest Developments

Table 96. Fresenius Kabi AG Basic Information, Blood Component Separation Bags Manufacturing Base, Sales Area and Its Competitors

Table 97. Fresenius Kabi AG Blood Component Separation Bags Product Portfolios and Specifications

Table 98. Fresenius Kabi AG Blood Component Separation Bags Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 99. Fresenius Kabi AG Main Business

Table 100. Fresenius Kabi AG Latest Developments

Table 101. Macopharma Basic Information, Blood Component Separation Bags Manufacturing Base, Sales Area and Its Competitors

Table 102. Macopharma Blood Component Separation Bags Product Portfolios and Specifications

Table 103. Macopharma Blood Component Separation Bags Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 104. Macopharma Main Business

Table 105. Macopharma Latest Developments

Table 106. Haemonetics Corporation Basic Information, Blood Component Separation Bags Manufacturing Base, Sales Area and Its Competitors

Table 107. Haemonetics Corporation Blood Component Separation Bags Product Portfolios and Specifications

Table 108. Haemonetics Corporation Blood Component Separation Bags Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 109. Haemonetics Corporation Main Business

Table 110. Haemonetics Corporation Latest Developments
Table 111. JMS Co., Ltd. Basic Information, Blood Component Separation Bags Manufacturing Base, Sales Area and Its Competitors
Table 112. JMS Co., Ltd. Blood Component Separation Bags Product Portfolios and Specifications
Table 113. JMS Co., Ltd. Blood Component Separation Bags Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 114. JMS Co., Ltd. Main Business
Table 115. JMS Co., Ltd. Latest Developments
Table 116. SB KAWASUMI LABORATORIES, INC. Basic Information, Blood Component Separation Bags Manufacturing Base, Sales Area and Its Competitors
Table 117. SB KAWASUMI LABORATORIES, INC. Blood Component Separation Bags Product Portfolios and Specifications
Table 118. SB KAWASUMI LABORATORIES, INC. Blood Component Separation Bags Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 119. SB KAWASUMI LABORATORIES, INC. Main Business
Table 120. SB KAWASUMI LABORATORIES, INC. Latest Developments
Table 121. WEGO Medical Basic Information, Blood Component Separation Bags Manufacturing Base, Sales Area and Its Competitors
Table 122. WEGO Medical Blood Component Separation Bags Product Portfolios and Specifications
Table 123. WEGO Medical Blood Component Separation Bags Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 124. WEGO Medical Main Business
Table 125. WEGO Medical Latest Developments
Table 126. Sichuan Nigale Biotechnology Co., Ltd. Basic Information, Blood Component Separation Bags Manufacturing Base, Sales Area and Its Competitors
Table 127. Sichuan Nigale Biotechnology Co., Ltd. Blood Component Separation Bags Product Portfolios and Specifications
Table 128. Sichuan Nigale Biotechnology Co., Ltd. Blood Component Separation Bags Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 129. Sichuan Nigale Biotechnology Co., Ltd. Main Business
Table 130. Sichuan Nigale Biotechnology Co., Ltd. Latest Developments
Table 131. Poly Medicure Limited Basic Information, Blood Component Separation Bags Manufacturing Base, Sales Area and Its Competitors
Table 132. Poly Medicure Limited Blood Component Separation Bags Product Portfolios and Specifications
Table 133. Poly Medicure Limited Blood Component Separation Bags Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 134. Poly Medicure Limited Main Business

Table 135. Poly Medicure Limited Latest Developments

Table 136. Mitra Industries Private Limited Basic Information, Blood Component Separation Bags Manufacturing Base, Sales Area and Its Competitors

Table 137. Mitra Industries Private Limited Blood Component Separation Bags Product Portfolios and Specifications

Table 138. Mitra Industries Private Limited Blood Component Separation Bags Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 139. Mitra Industries Private Limited Main Business

Table 140. Mitra Industries Private Limited Latest Developments

Table 141. HLL Lifecare Limited Basic Information, Blood Component Separation Bags Manufacturing Base, Sales Area and Its Competitors

Table 142. HLL Lifecare Limited Blood Component Separation Bags Product Portfolios and Specifications

Table 143. HLL Lifecare Limited Blood Component Separation Bags Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 144. HLL Lifecare Limited Main Business

Table 145. HLL Lifecare Limited Latest Developments

Table 146. INNVOL Medical India Limited Basic Information, Blood Component Separation Bags Manufacturing Base, Sales Area and Its Competitors

Table 147. INNVOL Medical India Limited Blood Component Separation Bags Product Portfolios and Specifications

Table 148. INNVOL Medical India Limited Blood Component Separation Bags Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 149. INNVOL Medical India Limited Main Business

Table 150. INNVOL Medical India Limited Latest Developments

Table 151. SURU International Private Limited Basic Information, Blood Component Separation Bags Manufacturing Base, Sales Area and Its Competitors

Table 152. SURU International Private Limited Blood Component Separation Bags Product Portfolios and Specifications

Table 153. SURU International Private Limited Blood Component Separation Bags Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 154. SURU International Private Limited Main Business

Table 155. SURU International Private Limited Latest Developments

Table 156. Nan Ya Plastics Corporation Basic Information, Blood Component Separation Bags Manufacturing Base, Sales Area and Its Competitors

Table 157. Nan Ya Plastics Corporation Blood Component Separation Bags Product Portfolios and Specifications

Table 158. Nan Ya Plastics Corporation Blood Component Separation Bags Sales (K

Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 159. Nan Ya Plastics Corporation Main Business

Table 160. Nan Ya Plastics Corporation Latest Developments

Table 161. BOEN Healthcare Co., Ltd. Basic Information, Blood Component Separation Bags Manufacturing Base, Sales Area and Its Competitors

Table 162. BOEN Healthcare Co., Ltd. Blood Component Separation Bags Product Portfolios and Specifications

Table 163. BOEN Healthcare Co., Ltd. Blood Component Separation Bags Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 164. BOEN Healthcare Co., Ltd. Main Business

Table 165. BOEN Healthcare Co., Ltd. Latest Developments

Table 166. C.Y. Medical Co., Ltd. Basic Information, Blood Component Separation Bags Manufacturing Base, Sales Area and Its Competitors

Table 167. C.Y. Medical Co., Ltd. Blood Component Separation Bags Product Portfolios and Specifications

Table 168. C.Y. Medical Co., Ltd. Blood Component Separation Bags Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 169. C.Y. Medical Co., Ltd. Main Business

Table 170. C.Y. Medical Co., Ltd. Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Blood Component Separation Bags
- Figure 2. Blood Component Separation Bags Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Blood Component Separation Bags Sales Growth Rate 2021-2032 (K Units)
- Figure 7. Global Blood Component Separation Bags Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Blood Component Separation Bags Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Blood Component Separation Bags Sales Market Share by Country/Region (2025)
- Figure 10. Blood Component Separation Bags Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of DEHP Bags
- Figure 12. Product Picture of PVC Bags
- Figure 13. Product Picture of Others
- Figure 14. Global Blood Component Separation Bags Sales Market Share by Type in 2026
- Figure 15. Global Blood Component Separation Bags Revenue Market Share by Type (2021-2026)
- Figure 16. Product Picture of Red Blood Cell Bags
- Figure 17. Product Picture of Plasma Bags
- Figure 18. Product Picture of Platelet Bags
- Figure 19. Product Picture of General Purpose Transfer Bags
- Figure 20. Product Picture of Others
- Figure 21. Global Blood Component Separation Bags Sales Market Share by Target Blood Component in 2026
- Figure 22. Global Blood Component Separation Bags Revenue Market Share by Target Blood Component (2021-2026)
- Figure 23. Product Picture of Below 300 mL
- Figure 24. Product Picture of 300 to 500 mL
- Figure 25. Product Picture of Above 500 mL
- Figure 26. Global Blood Component Separation Bags Sales Market Share by Nominal

Capacity in 2026

Figure 27. Global Blood Component Separation Bags Revenue Market Share by Nominal Capacity (2021-2026)

Figure 28. Blood Component Separation Bags Consumed in Blood Centers and Blood Banks

Figure 29. Global Blood Component Separation Bags Market: Blood Centers and Blood Banks (2021-2026) & (K Units)

Figure 30. Blood Component Separation Bags Consumed in Hospitals

Figure 31. Global Blood Component Separation Bags Market: Hospitals (2021-2026) & (K Units)

Figure 32. Blood Component Separation Bags Consumed in Others

Figure 33. Global Blood Component Separation Bags Market: Others (2021-2026) & (K Units)

Figure 34. Global Blood Component Separation Bags Sale Market Share by Application (2025)

Figure 35. Global Blood Component Separation Bags Revenue Market Share by Application in 2025

Figure 36. Blood Component Separation Bags Sales by Company in 2025 (K Units)

Figure 37. Global Blood Component Separation Bags Sales Market Share by Company in 2025

Figure 38. Blood Component Separation Bags Revenue by Company in 2025 (\$ millions)

Figure 39. Global Blood Component Separation Bags Revenue Market Share by Company in 2025

Figure 40. Global Blood Component Separation Bags Sales Market Share by Geographic Region (2021-2026)

Figure 41. Global Blood Component Separation Bags Revenue Market Share by Geographic Region in 2025

Figure 42. Americas Blood Component Separation Bags Sales 2021-2026 (K Units)

Figure 43. Americas Blood Component Separation Bags Revenue 2021-2026 (\$ millions)

Figure 44. APAC Blood Component Separation Bags Sales 2021-2026 (K Units)

Figure 45. APAC Blood Component Separation Bags Revenue 2021-2026 (\$ millions)

Figure 46. Europe Blood Component Separation Bags Sales 2021-2026 (K Units)

Figure 47. Europe Blood Component Separation Bags Revenue 2021-2026 (\$ millions)

Figure 48. Middle East & Africa Blood Component Separation Bags Sales 2021-2026 (K Units)

Figure 49. Middle East & Africa Blood Component Separation Bags Revenue 2021-2026 (\$ millions)

Figure 50. Americas Blood Component Separation Bags Sales Market Share by Country in 2025

Figure 51. Americas Blood Component Separation Bags Revenue Market Share by Country (2021-2026)

Figure 52. Americas Blood Component Separation Bags Sales Market Share by Type (2021-2026)

Figure 53. Americas Blood Component Separation Bags Sales Market Share by Application (2021-2026)

Figure 54. United States Blood Component Separation Bags Revenue Growth 2021-2026 (\$ millions)

Figure 55. Canada Blood Component Separation Bags Revenue Growth 2021-2026 (\$ millions)

Figure 56. Mexico Blood Component Separation Bags Revenue Growth 2021-2026 (\$ millions)

Figure 57. Brazil Blood Component Separation Bags Revenue Growth 2021-2026 (\$ millions)

Figure 58. APAC Blood Component Separation Bags Sales Market Share by Region in 2025

Figure 59. APAC Blood Component Separation Bags Revenue Market Share by Region (2021-2026)

Figure 60. APAC Blood Component Separation Bags Sales Market Share by Type (2021-2026)

Figure 61. APAC Blood Component Separation Bags Sales Market Share by Application (2021-2026)

Figure 62. China Blood Component Separation Bags Revenue Growth 2021-2026 (\$ millions)

Figure 63. Japan Blood Component Separation Bags Revenue Growth 2021-2026 (\$ millions)

Figure 64. South Korea Blood Component Separation Bags Revenue Growth 2021-2026 (\$ millions)

Figure 65. Southeast Asia Blood Component Separation Bags Revenue Growth 2021-2026 (\$ millions)

Figure 66. India Blood Component Separation Bags Revenue Growth 2021-2026 (\$ millions)

Figure 67. Australia Blood Component Separation Bags Revenue Growth 2021-2026 (\$ millions)

Figure 68. China Taiwan Blood Component Separation Bags Revenue Growth 2021-2026 (\$ millions)

Figure 69. Europe Blood Component Separation Bags Sales Market Share by Country

in 2025

Figure 70. Europe Blood Component Separation Bags Revenue Market Share by Country (2021-2026)

Figure 71. Europe Blood Component Separation Bags Sales Market Share by Type (2021-2026)

Figure 72. Europe Blood Component Separation Bags Sales Market Share by Application (2021-2026)

Figure 73. Germany Blood Component Separation Bags Revenue Growth 2021-2026 (\$ millions)

Figure 74. France Blood Component Separation Bags Revenue Growth 2021-2026 (\$ millions)

Figure 75. UK Blood Component Separation Bags Revenue Growth 2021-2026 (\$ millions)

Figure 76. Italy Blood Component Separation Bags Revenue Growth 2021-2026 (\$ millions)

Figure 77. Russia Blood Component Separation Bags Revenue Growth 2021-2026 (\$ millions)

Figure 78. Middle East & Africa Blood Component Separation Bags Sales Market Share by Country (2021-2026)

Figure 79. Middle East & Africa Blood Component Separation Bags Sales Market Share by Type (2021-2026)

Figure 80. Middle East & Africa Blood Component Separation Bags Sales Market Share by Application (2021-2026)

Figure 81. Egypt Blood Component Separation Bags Revenue Growth 2021-2026 (\$ millions)

Figure 82. South Africa Blood Component Separation Bags Revenue Growth 2021-2026 (\$ millions)

Figure 83. Israel Blood Component Separation Bags Revenue Growth 2021-2026 (\$ millions)

Figure 84. Turkey Blood Component Separation Bags Revenue Growth 2021-2026 (\$ millions)

Figure 85. GCC Countries Blood Component Separation Bags Revenue Growth 2021-2026 (\$ millions)

Figure 86. Manufacturing Cost Structure Analysis of Blood Component Separation Bags in 2026

Figure 87. Manufacturing Process Analysis of Blood Component Separation Bags

Figure 88. Industry Chain Structure of Blood Component Separation Bags

Figure 89. Channels of Distribution

Figure 90. Global Blood Component Separation Bags Sales Market Forecast by Region

(2027-2032)

Figure 91. Global Blood Component Separation Bags Revenue Market Share Forecast by Region (2027-2032)

Figure 92. Global Blood Component Separation Bags Sales Market Share Forecast by Type (2027-2032)

Figure 93. Global Blood Component Separation Bags Revenue Market Share Forecast by Type (2027-2032)

Figure 94. Global Blood Component Separation Bags Sales Market Share Forecast by Application (2027-2032)

Figure 95. Global Blood Component Separation Bags Revenue Market Share Forecast by Application (2027-2032)

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