

Apheresis Market Size by Product (Device (Centrifugation, Membrane Separation) Disposable), Procedure (Donor, Therapeutic), Application (Plasmapheresis, Plateletpheresis), Technology, End-User (Hospital, Blood Collection Center), Region - Global Forecast to 2029

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Abstracts

The global apheresis market is projected to reach USD 3.9 billion by 2029 from USD 2.6 billion in 2024, at a CAGR of 8.8% from 2024 to 2029. The growth of the market is driven by a rising incidence of trauma and injury cases, upsurging number of complex surgical procedure. The market also benefits from rise in investments from government bodies and key players and the surge in use of apheresis procedure for leukaemia and paediatric patients.

However, significant expenses associated with apheresis devices and therapeutic procedures, along with the option of installing apheresis devices via rental agreements, are impacting the industry. Moreover, decline in apheresis-based blood donations due to insufficient awareness among potential donors is a major factor restraining the market growth.

“Therapeutic apheresis disposables segment to witness the highest growth during the forecast period.”

Based on procedure, the segment is divided into automated blood collection and therapeutic apheresis. The therapeutic apheresis is further divided into therapeutic apheresis disposables and therapeutic apheresis devices. The therapeutic apheresis disposables witness the highest growth in the apheresis market during the forecast

period, attributing to rise in awareness about apheresis procedures, particularly for therapeutic purposes. This increased awareness has led to a growing acceptance of apheresis as an effective treatment option among healthcare providers and patients alike. Moreover, there is a significant increase in research activities focusing on apheresis procedures for therapeutic applications. This ongoing research is uncovering new insights into the efficacy and versatility of apheresis in treating various medical conditions, ranging from autoimmune disorders to hematologic malignancies. Thus, healthcare professionals are increasingly incorporating these procedures into their treatment protocols. As a result, the demand for therapeutic apheresis procedures is expected to surge in the coming years.

“Continuous flow centrifugation segment accounted for the largest share in the apheresis market during the forecast period.”

Based on technology, the apheresis market is segmented into centrifugation, and membrane separation. The centrifugation segment is further divided into continuous flow centrifugation and intermittent flow centrifugation. Among these, the continuous flow centrifugation segment accounted for largest share in the apheresis market in 2023. As continuous flow centrifugation technology is highly preferred in both blood collection and therapeutic apheresis procedures due to its efficiency and effectiveness. This technology allows for a smoother and more consistent separation process, leading to higher yields of desired blood components. As a result, healthcare facilities and blood collection centers Favor continuous flow centrifugation systems to streamline their operations and improve overall productivity. Moreover, continuous flow centrifugation technology offers several distinct advantages, such as its ability to operate with a small extracorporeal volume (ECV), minimizing the patient's exposure to extracorporeal circulation. Additionally, this technology is associated with shorter procedural times and requires relatively low volumes of anticoagulants, which enhances patient safety and comfort. These advantages make continuous flow centrifugation a preferred choice among healthcare providers, thus increasing the market growth during forecasting period.

“APAC is estimated to register the highest CAGR during the forecast period.”

In this report, the apheresis market is segmented into five major regional segments, namely, North America, Europe, Asia Pacific, Latin America and Middle East and Africa. The market in APAC is projected to register the highest growth rate during the forecast period, attributing to expansion of healthcare infrastructure and blood banking facilities. This is due to increasing support from governments across the region for the

development of healthcare infrastructure. These countries are growing economically thus, governments are allocating substantial resources towards enhancing healthcare services, including the establishment of modern medical facilities and the adoption of advanced medical technologies like apheresis devices. Moreover, increasing awareness of the importance of safe blood transfusions and the need for advanced blood collection and processing techniques, governments and healthcare authorities are incentivizing the expansion and modernization of blood banking facilities. Thus, increasing the government-licensed and accredited blood banks, leading to rise in the growth of apheresis market.

Breakdown of supply-side primary interviews, by company type, designation, and region:

By Company Type: Tier 1 (20%), Tier 2 (45%), and Tier 3 (35%)

By Designation: C-level (30%), Director-level (20%), and Others (50%)

By Region: North America (35%), Europe (24%), Asia Pacific (25%), Latin America and Middle East Africa (16%)

List of Companies Profiled in the Report

Terumo BCT, Inc. (Japan)

Fresenius SE & Co. KGaA (Germany)

Haemonetics Corporation (US)

Baxter International Inc. (US)

Asahi Kasei Medical Co., Ltd. (Japan)

B. Braun Melsungen AG (Germany)

Cerus Corporation (US)

Kaneka Corporation (Japan)

SB-Kawasumi Laboratories, Inc (Japan)

Nikkiso Co., Ltd (Japan)

Macopharma SA (France)

Miltenyi Biotec (Germany)

Otsuka Holdings Co., Ltd. (Japan)

Medica S.p.A. (Italy)

Mallinckrodt plc (Ireland)

Becton, Dickinson and Company (US)

LMB Technologie GmbH (Germany)

Bioelettronica S.r.l. (Italy)

Infomed SA (Switzerland)

Cytosorbents Corporation (US)

Medicap clinic GmbH (Germany)

Haier Biomedical (China)

Beijing ZKSK Technology Co., Ltd. (China)

Guangzhou Daji Medical Science and Technology Co. Ltd (China)

PuriBlood Medical (Taiwan)

Research Coverage

This report studies the apheresis market based on product, procedure, technology, application, end user and region. The report also analyses factors (such as drivers,

Apheresis Market Size by Product (Device (Centrifugation, Membrane Separation) Disposable), Procedure (Donor,...

restraints, opportunities and challenges) affecting market growth. It evaluates the opportunities and challenges in the market for stakeholders and provides details of the competitive landscape for market leaders. The report also studies micro markets with respect to their growth trends, prospects, and contributions to the total apheresis market. The report forecasts the revenue of the market segments with respect to five major regions.

Reasons to Buy the Report

This report also includes.

Analysis of key drivers (increasing prevalence of trauma and injury cases, rise in demand for source plasma from biopharmaceutical companies, upsurging number of complex surgical procedures, and favourable reimbursement for apheresis procedures) ,restraints (High cost of apheresis devices & therapeutic apheresis procedures and installation of apheresis devices through rental model, Fewer blood donations using apheresis due to lack of awareness, Stringent donor recruitment criteria), challenges (recruitment of voluntary non-remunerated donors, and safety of blood transfusion in developing countries), opportunities (apheresis for leukaemia and paediatric patients, and emerging economies with increasing investments from government authorities and key players) contributing the growth of the apheresis market.

Product Development/Innovation: Detailed insights on upcoming trends, research & development activities, and new software launches in the apheresis market.

Market Development: Comprehensive information on the lucrative emerging markets, product, procedure, technology, application, end-user and region.

Market Diversification: Exhaustive information about the growing geographies, recent developments, investments in the apheresis market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, product offerings, company evaluation quadrant, and capabilities of leading players in the global apheresis market.

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*Details on Business overview, Products/Solutions/Services offered, Recent developments, MnM view, Right to win, Strategic choices, and Weaknesses and Competitive threats might not be captured in case of unlisted companies.

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