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Blood Plasma Fractionation Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product (Albumin, Immunoglobulins, Coagulation Factors, Protease Inhibitors and Others), By Method (Centrifugation, Depth Filtration, Chromatography, and Others), By Application (Neurology, Haematology, Oncology, Immunology, Pulmonology, and Others), By End Use (Hospitals & Clinics, Clinical Research, and Others), By Region and Competition, 2020-2030F

https://marketpublishers.com/r/B7E00AA3F8F2EN.html
Date: February 2025
Pages: 182
Price: US$ 4,500.00 (Single User License)
ID: B7E00AA3F8F2EN

Abstracts

Global Blood Plasma Fractionation Market was valued at USD 35.76 Billion in 2024 and is expected to reach USD 58.51 Million by 2030 with a CAGR of 8.51% during the forecast period. The Global Blood Plasma Fractionation Market is primarily driven by the increasing demand for plasma-derived therapies, which are essential for treating various chronic and life-threatening conditions such as hemophilia, immunodeficiencies, and autoimmune disorders. As the global prevalence of these diseases rises, the need for blood plasma products grows, fueling market expansion. Advancements in fractionation technologies, enabling more efficient and cost-effective production processes, contribute to market growth. The growing focus on healthcare infrastructure in emerging economies and the rising awareness of plasma donation programs further support market demand. The increasing number of plasma collection centers and the supportive regulatory frameworks also play a significant role in the development of the market, ensuring a steady supply of high-quality plasma products.

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Key Market Drivers

Growing Awareness and Investment in Plasma Donation

The increasing awareness of the importance of blood plasma donation plays a significant role in driving the global blood plasma fractionation market. Plasma is a renewable resource, but it must be collected regularly, requiring widespread participation in donation programs. Governments, non-governmental organizations (NGOs), and healthcare providers around the world are working to raise awareness about the critical role of plasma in treating diseases and the life-saving potential of plasma donation. According to WHO, Globally, 118.5 million blood donations are collected each year, with 40% of these donations coming from high-income countries, which account for just 16% of the world's population. In low-income countries, up to 54% of blood transfusions are administered to children under the age of 5, whereas in high-income countries, the most common recipients are individuals over 60, who receive up to 76% of all transfusions. Blood donation rates vary significantly across income levels, with high-income countries averaging 31.5 donations per 1,000 people, upper-middle-income countries at 16.4 donations, lower-middle-income countries at 6.6 donations, and low-income countries at 5.0 donations per 1,000 people.

In countries like the United States, where plasma collection centers are in abundance, many efforts are made to encourage regular plasma donations. These initiatives help to ensure a steady and reliable supply of plasma for fractionation, thus enabling pharmaceutical companies to meet the growing demand for plasma-derived products. Increased public awareness and education about the process, as well as the benefits of plasma donation, contribute to a larger donor pool. The rise in plasma donor compensation programs has made donating more attractive, encouraging higher donation rates and further supporting the growth of the plasma fractionation market.

Investment from both the private and public sectors has also been critical in the expansion of plasma collection centers and infrastructure. Increased financial support has allowed for the establishment of more donation centers, providing greater access to plasma collection and ensuring a more robust supply chain for fractionation.

Aging Global Population

The aging population is a major driver of the blood plasma fractionation market. As people live longer, the prevalence of age-related conditions like hemophilia, immunodeficiencies, and chronic autoimmune diseases has risen significantly. Older

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individuals are more likely to develop conditions that require plasma-derived therapies, such as immune disorders that can result from the natural decline in immune system function with age. According to WHO, he global population aged 60 and over is projected to rise from 1 billion in 2020 to 1.4 billion. By 2050, the number of people aged 60 and above is expected to double, reaching 2.1 billion. The population aged 80 and older is forecasted to triple between 2020 and 2050, reaching 426 million.

For example, immunoglobulin therapies are commonly used to treat patients with primary immune deficiencies and autoimmune conditions like rheumatoid arthritis and lupus, which are more common among older adults. The demand for plasma products like immunoglobulins, clotting factors, and albumin is therefore expected to grow in parallel with the aging demographic.

As the aging population increases worldwide, especially in developed regions such as Europe and North America, healthcare systems must adapt to meet the rising demand for these life-saving treatments. This demographic shift creates an ongoing need for the production of plasma-derived therapies, which in turn drives the market for blood plasma fractionation.

Expanding Plasma Collection Infrastructure

The expansion of plasma collection infrastructure is a significant driver of the blood plasma fractionation market. With the rising demand for plasma-derived therapies, there is a growing need for more plasma collection centers worldwide. To meet this demand, the number of dedicated plasma collection centers has increased, especially in regions like North America, Europe, and Asia.

Plasma collection centers serve as the primary source of plasma, which is then processed through fractionation to create life-saving therapies. The establishment of new centers is essential for maintaining a steady and sufficient supply of plasma, which directly influences the availability of therapies such as immunoglobulins, clotting factors, and albumin. Advances in plasma collection techniques have made the process more efficient, allowing collection centers to handle larger volumes of plasma, ensuring adequate supply.

The expansion of plasma collection infrastructure is also supported by improved logistics and transportation systems, ensuring that plasma can be quickly and safely delivered to fractionation facilities. The growing number of collection centers, combined with innovations in the collection process, is a major driver of the market, as it enhances

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the supply chain and ensures consistent product availability.

Rising Incidence of Chronic Diseases and Rare Disorders

The increasing prevalence of chronic diseases and rare disorders is another important factor driving the blood plasma fractionation market. Chronic conditions such as hemophilia, autoimmune diseases, and immunodeficiencies often require ongoing treatment with plasma-derived therapies. For example, hemophilia A and B patients need regular infusions of clotting factors derived from blood plasma to manage bleeding episodes. In the European Union, it is estimated that between 27 and 36 million people are living with a rare disease. Currently, there are between 6,000 and 8,000 distinct rare diseases, with some affecting only a few patients, while others can impact as many as 245,000 individuals. Approximately 80% of rare diseases are of genetic origin, and 70% of these conditions begin during childhood.

The rise in the global burden of these diseases is expected to lead to a higher demand for plasma products. Rare genetic disorders, such as certain types of immunodeficiencies, also require specialized therapies that are derived from plasma. As the global population becomes more aware of these disorders and as diagnostic methods improve, early diagnosis is leading to an increased need for plasma therapies.

In countries with higher healthcare spending, especially in developed economies, there is a greater emphasis on providing advanced treatments for chronic diseases, which further drives the demand for plasma-based therapies. As medical research continues to reveal new applications for plasma-derived products in treating chronic conditions, the market for blood plasma fractionation is poised for continued growth.

Increased Healthcare Expenditure and Investment in Medical Research

Increased healthcare expenditure and investment in medical research are key drivers in the global blood plasma fractionation market. Governments and private entities are investing heavily in healthcare infrastructure and research to better understand and treat diseases that require plasma-derived therapies. This has led to breakthroughs in medical science, including more effective treatments for autoimmune diseases, hemophilia, and other conditions that depend on plasma products.

Higher healthcare spending allows for the development of cutting-edge medical treatments, the expansion of plasma collection and fractionation infrastructure, and the continued advancement of technologies to improve plasma fractionation processes.

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Research into optimizing plasma collection and processing techniques has been a significant focus, improving the cost-effectiveness and scalability of plasma-derived therapies.

As healthcare systems allocate more resources to improve patient outcomes, especially for chronic and rare diseases, investment in plasma-based therapies has surged, driving market growth. These investments not only increase the availability of plasma-derived products but also contribute to ongoing innovation within the market, further accelerating its expansion.

Key Market Challenges

High Costs of Plasma Fractionation

One of the major challenges in the blood plasma fractionation market is the high cost of plasma-derived products. Plasma fractionation is a complex and resource-intensive process, requiring sophisticated technologies and specialized infrastructure. The costs associated with collecting, processing, and purifying blood plasma to derive specific therapeutic proteins such as immunoglobulins, clotting factors, and albumin are substantial.

These high costs are passed on to patients and healthcare systems, making these life-saving therapies expensive and less accessible, especially in lower-income countries. The production of plasma-based therapies is highly regulated to ensure quality and safety, which adds additional financial burdens. As demand continues to rise, there is increasing pressure to reduce costs while maintaining product quality, which is a delicate balance for the industry.

Plasma Shortages and Supply Chain Constraints

The global demand for blood plasma-derived therapies is growing, but the supply of plasma is often insufficient to meet this demand. Plasma collection is highly dependent on voluntary donations, and there are regional disparities in donation rates. Countries with low donation rates face challenges in ensuring a steady and sufficient plasma supply, which impacts the entire supply chain from collection to fractionation.

Logistical challenges, such as transportation of plasma across long distances, the need for proper storage conditions, and potential delays in collection, further complicate the supply chain. Shortages in plasma availability could lead to delays in therapy production

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and a lack of access to essential treatments, especially in regions where healthcare systems are underfunded or less developed.

Technological and Operational Limitations in Plasma Fractionation

While advancements in plasma fractionation technologies have improved efficiency and yield, the process is still limited by technological and operational constraints. Plasma fractionation is a delicate process that requires high levels of expertise, and any failure in the fractionation process can result in the loss of valuable plasma and raw materials. This makes scaling up production challenging, as large-scale fractionation facilities must maintain consistently high standards of performance and quality.

The complex nature of plasma fractionation requires significant investment in advanced technologies and infrastructure. Smaller companies and organizations in less developed regions may struggle to afford these investments, leading to disparities in production capabilities across the globe. Operational challenges, such as the need for specialized equipment, trained personnel, and quality control systems, add to the difficulties faced by the industry. These limitations can impact the scalability of plasma-based products, preventing certain regions from fully tapping into the market potential.

Key Market Trends

Increasing Demand for Plasma-Derived Therapies

The rising demand for plasma-derived therapies is a key driver in the blood plasma fractionation market. Plasma-derived therapies, which include clotting factor concentrates, immunoglobulins, and albumin, are crucial for treating a wide variety of medical conditions, including bleeding disorders, immunodeficiencies, and liver diseases. Hemophilia, a genetic disorder characterized by an inability to clot blood, is one of the main conditions treated with plasma-derived products like clotting factors. As the global incidence of these diseases continues to rise, especially among the aging population, the demand for these life-saving therapies has expanded dramatically. In September 2024, Grifols, a global healthcare company, partnered with French telecom giant Orange to establish a sustainable supply of vital therapeutics for life-threatening diseases in Egypt. Orange Business, the enterprise division of Orange Group, has successfully completed the first phase of a new data center and communication infrastructure in Cairo, aimed at supporting Grifols Egypt for Plasma Derivatives (GEPD). This collaboration is designed to enhance healthcare capabilities in the country by ensuring a reliable supply of essential plasma-derived products.

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In addition, advancements in medical treatments and a growing understanding of chronic conditions such as autoimmune disorders and immunodeficiencies have resulted in an increased need for immunoglobulins, which are derived from blood plasma. These therapies play a crucial role in helping patients manage conditions like rheumatoid arthritis, lupus, and primary immune deficiencies. The ability of plasma-derived therapies to provide long-term, life-sustaining treatment for chronic conditions has made them essential in healthcare systems worldwide, thus propelling the growth of the blood plasma fractionation market. The expanding use of these therapies has also driven up the demand for blood plasma collection and fractionation technologies, which can process large quantities of plasma while ensuring product safety, quality, and efficacy. As a result, medical research and development efforts continue to focus on improving the effectiveness and accessibility of plasma-based treatments, ensuring sustained market growth in this sector.

Advancements in Fractionation Technologies

Technological advancements in plasma fractionation techniques are a significant driver of the global market. Fractionation is the process of separating blood plasma into its various components, including immunoglobulins, clotting factors, albumin, and other proteins, each with specific medical uses. With the rise in demand for high-quality plasma products, the need for advanced, efficient, and cost-effective fractionation methods has become more critical.

Over the years, fractionation technologies have evolved from older, less efficient methods to highly automated, large-scale processes that offer greater yields and faster processing times. This has allowed for the more efficient extraction and purification of proteins from plasma, thereby meeting the increasing demand. Newer methods have reduced the risk of contamination and improved the overall safety and quality of plasma-derived products. Techniques such as chromatography, ultrafiltration, and cryoprecipitation are now being optimized to increase both the scale and consistency of production.

The continuous development of more refined fractionation technologies has improved the efficiency of production, making it more affordable and sustainable. Companies in the plasma fractionation market are also exploring novel techniques that focus on maximizing plasma yield while minimizing costs, making plasma collection and processing more economically viable. As these technologies advance, the market will continue to grow, driven by the need to meet global demand for plasma-derived

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therapies.

Segmental Insights

Product Insights

Based on the product, Immunoglobulins are currently the fastest-growing segment in the global blood plasma fractionation market. Immunoglobulins, particularly intravenous immunoglobulin (IVIG), represent the largest and fastest-growing therapeutic class derived from blood plasma. Immunoglobulins are essential for treating a wide range of conditions, including primary immunodeficiencies (PID), autoimmune disorders, and infections. The growing prevalence of immunodeficiencies, autoimmune diseases, and increasing awareness of immunoglobulin therapy's effectiveness have significantly boosted their demand in recent years.

The global increase in the number of patients diagnosed with autoimmune diseases, such as rheumatoid arthritis, lupus, and multiple sclerosis, has contributed to the expanding use of immunoglobulins. Immunoglobulins are often used in the treatment of rare diseases such as Guillain-Barr? syndrome and chronic inflammatory demyelinating polyneuropathy (CIDP), further driving demand. IVIG is commonly used in hospitals and outpatient settings for patients who require long-term immune support due to compromised immune systems. As the aging global population is more susceptible to infections and immune-related disorders, the need for immunoglobulin therapies is expected to continue growing.

In addition to autoimmune diseases, the rise in infectious diseases has led to greater reliance on immunoglobulins for post-exposure prophylaxis and treatment. The ongoing COVID-19 pandemic highlighted the importance of immunoglobulin therapy, with convalescent plasma-based therapies being explored as treatments for viral infections, further boosting the demand for immunoglobulins. This surge in demand, combined with increased research into the therapeutic benefits of immunoglobulins in treating a broader spectrum of diseases, has reinforced the dominance of this segment in the blood plasma fractionation market..

End Use Insights

Based on the end use segment, Hospitals & Clinics was the dominant segment. The demand for plasma-derived products, such as immunoglobulins, albumin, coagulation factors, and other therapeutics, is primarily driven by their widespread use in hospital

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and clinic settings for the treatment of various diseases and medical conditions. These healthcare facilities account for the largest share of the market due to their role as the primary point of care for patients requiring plasma-based therapies.

Hospitals are critical in providing urgent, life-saving treatments for patients with chronic conditions like hemophilia, immunodeficiencies, and autoimmune diseases, all of which rely heavily on plasma-derived products. For example, intravenous immunoglobulin (IVIG) is commonly administered in hospitals for patients with primary immunodeficiencies and autoimmune disorders such as rheumatoid arthritis and lupus. Hospitals are also the key settings for treating severe burns, liver diseases, and shock, where albumin is often used as a vital treatment to restore blood volume and maintain osmotic pressure.

In addition to routine treatments, hospitals and clinics play a crucial role in the treatment of acute medical conditions. For example, plasma-derived coagulation factors are frequently used in emergency care settings to treat bleeding episodes in patients with hemophilia or other clotting disorders. These facilities are equipped to handle the specialized care and monitoring required for administering plasma-derived therapies, further solidifying their dominance in the market. The large number of patients in need of these treatments and the need for immediate intervention in clinical settings ensure that hospitals and clinics remain the largest consumers of plasma-derived products.

Regional Insights

North America was the dominant region in the global blood plasma fractionation market. The United States, in particular, plays a significant role in this dominance, contributing the largest share of the market in terms of both plasma collection and consumption of plasma-derived therapies. The robust healthcare infrastructure, advanced medical research capabilities, and high demand for plasma-derived products like immunoglobulins, albumin, and clotting factors have positioned North America as the leader in the blood plasma fractionation market.

One of the key drivers of North America’s dominance is the high prevalence of diseases that require plasma-based treatments, such as hemophilia, autoimmune disorders, and immunodeficiencies. In the U.S., an aging population and increased awareness of the effectiveness of plasma-derived therapies contribute to the growing demand for these products. The rise in chronic diseases, including rheumatoid arthritis, multiple sclerosis, and primary immunodeficiencies, further fuels the need for plasma therapies in the region. These treatments are primarily administered in hospitals and

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clinics, which are abundant and well-equipped to handle the complex requirements of plasma-derived therapies. This high demand for plasma products ensures that North America remains the largest market for blood plasma fractionation.

The United States has a well-established and expansive network of plasma collection centers, which ensures a steady supply of plasma for fractionation. The country's commitment to plasma donation programs, supported by both public and private sectors, has helped create a strong and reliable plasma supply chain. Plasma donation is encouraged through compensation programs, which incentivize individuals to donate regularly, thereby boosting the availability of raw plasma. The U.S. also leads in the development and approval of new plasma-derived therapies, which further strengthens its position in the global market.

Key Market Players

Grifols, S.A.

CSL Limited

Takeda Pharmaceutical Company Limited

Octapharma AG

Kedrion S.p.A

Biotest AG

Bio Products Laboratory Ltd.

Intas Pharmaceuticals Ltd.

ADMA Biologics, Inc.

Meiji Holdings Co., Ltd.

Report Scope:

In this report, the Global Blood Plasma Fractionation Market has been segmented into

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the following categories, in addition to the industry trends which have also been detailed below:

Blood Plasma Fractionation Market, By Product:

Albumin

Immunoglobulins

Coagulation Factors

Protease Inhibitors

Others

Blood Plasma Fractionation Market, By Method:

Centrifugation

Depth Filtration

Chromatography

Others

Blood Plasma Fractionation Market, By Application:

Neurology

Haematology

Oncology

Immunology

Pulmonology

Others

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Blood Plasma Fractionation Market, By End Use:

Hospitals & Clinics

Clinical Research

Others

Blood Plasma Fractionation Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

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South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Blood Plasma Fractionation Market.

Available Customizations:

Global Blood Plasma Fractionation market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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