

## **Asia Pacific Apheresis - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-08-01 | 110 pages | Mordor Intelligence

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### **Report description:**

Asia Pacific Apheresis Market Analysis

The Asia Pacific Apheresis Market size is estimated at USD 0.82 billion in 2025, and is expected to reach USD 1.35 billion by 2030, at a CAGR of 10.57% during the forecast period (2025-2030).

Rapid adoption of automated blood-component technologies, expanding CAR-T cell therapy logistics, and public investment under national healthcare agendas such as "Healthy China 2030" collectively amplify procedure volumes across the region. Hospitals and blood centers are modernizing collection rooms with next-generation systems that shorten processing times, while research institutes channel grant funding toward cell-therapy-oriented leukapheresis platforms. Meanwhile, strategic localization by multinationals reduces import lead times and aligns with government procurement mandates, deepening supplier loyalty. Market risks persist around reimbursement gaps, consumable-approval inconsistencies, and shortages of certified operators, yet rising demand for precision therapies continues to outweigh these constraints, sustaining a robust long-term growth outlook for the Asia Pacific apheresis market.

Asia Pacific Apheresis Market Trends and Insights

Growth of National Blood Component Initiatives

Government-backed blood-safety programs are reshaping procedure volumes as China upgrades more than 450 blood centers

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under its "Healthy China 2030" roadmap. Capital expenditure aims squarely at automated component separation, illustrated by Terumo's USD 15 million facility in Hangzhou that manufactures Trima Accel kits locally, lowering unit cost and reducing customs delays. Indonesia's first plasma-fractionation plant targeting 600,000 liters by 2026 underscores a region-wide shift toward self-sufficiency. Standardized procurement frameworks emerging from these programs favor systems with closed-loop traceability and virus-inactivation modules, reinforcing purchasing preferences for premium platforms and propelling the Asia Pacific apheresis market.

#### Public Investment in Thrombocytopenia Treatment

Japan, Australia, and South Korea are front-loading budgets to secure platelet supply as aging demographics and oncology caseloads intensify. The Japanese Red Cross "Nara Regimen" expands certified operator pools through university-linked training that enhances competence on automated plateletpheresis devices. Evidence from Sanquin's deployment of Reveos shows platelet units produced per donor rising from four to five, yielding a 20% cost saving per unit. These economics encourage ministries of health to underwrite disposable budgets, accelerating uptake in the Asia Pacific apheresis market.

#### Limited Reimbursement Frameworks Across Most APAC Nations

Fee schedules in emerging markets seldom cover disposables fully, leaving providers to absorb 20-40% of procedure cost for therapeutic apheresis. South Korea's overhaul of generic-drug pricing illustrates policymaker focus on budget ceilings rather than procedure expansion. India's Rare Diseases Policy highlights fiscal constraints, allocating only USD 3.6 million annually for a population of 1.4 billion. Consequently, cash-pay models dominate, curtailing patient access and capping near-term growth for the Asia Pacific apheresis market.

Other drivers and restraints analyzed in the detailed report include:

Accelerated Adoption of Advanced Plasmapheresis Technologies / Integration of Apheresis in CAR-T Therapy Logistics / Shortage of Specialized Apheresis Personnel /

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

Recurring demand for tubing sets, separation kits, and filters kept disposables at 62.33% of Asia Pacific apheresis market share in 2024. Steady procedure growth, stringent sterility rules, and single-use mandates ensure predictable volume gains. Bundled-pricing contracts negotiated by national blood services enhance vendor lock-in, stabilizing margins. Meanwhile, the devices segment, supported by a 14.08% CAGR, benefits from replacement cycles for legacy centrifuges reaching end-of-life and from automation upgrades that cut operator intervention by up to 65%. Fresenius Kabi's Adaptive Nomogram software, cleared by the FDA, exemplifies how analytics overlays deliver incremental performance, persuading budget-constrained hospitals to refresh fleets.

Hospitals increasingly demand integrated platforms whereby proprietary disposables synchronize with device firmware, anchoring long-run consumable revenue for suppliers. Terumo's Reveos platform reduces manual steps from 26 to 9, improving throughput and releasing staff for value-added clinical tasks. Competitive intensity revolves around field-service coverage and software interoperability, elevating the Asia Pacific apheresis market size tied to premium devices that interlock data with electronic medical records.

Plasmapheresis accounted for 42.87% of total procedure revenue in 2024 as plasma-derived immunoglobulin demand rises

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among aging populations. National plasma-fractionation targets push hospitals to increase donor recruitment, sustaining steady kit consumption. Leukapheresis, forecast to grow at 12.87% CAGR, capitalizes on hematology and CAR-T pipelines that require high-purity mononuclear cell collections. Clinical trials in China showed optimized centrifugation protocols lowering leukocytosis within two hours while preserving viability, supporting broader therapy adoption.

Plateletpheresis remains indispensable for oncology support, yet volume growth stabilizes as process efficiencies emerge. Erythrocytapheresis gains niche traction in sickle-cell programs, notably in India's tribal regions where prevalence exceeds 1.8%. Emerging modalities such as photopheresis and lipid-apheresis attract specialist centers, offering upside to the Asia Pacific apheresis industry as regulatory approvals widen.

The Asia Pacific Apheresis Market Report is Segmented by Product (Devices, Disposables), Procedure (Plasmapheresis, and More), Indication (Renal Disorders, and More), Technology (Centrifugal Separation, Membrane Separation), End User (Hospitals & Transfusion Centers, and More), and Country (China, Japan, India, South Korea, Australia & New Zealand, Rest of Asia Pacific). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Terumo / Asahi Kasei (Medical) / Fresenius / Haemonetics / Kaneka / B. Braun / Cerus / Grifols / MacoPharma / Kawasumi Laboratories / Nikkiso Co., Ltd. / JMS Co., Ltd. / GVS S.p.A. / Miltenyi Biotec / Stem Cell Technologies / HemaCare (Charles River) / Medica S.p.A. / Biosafe SA (GE-Cytiva) / Nigale Biotech / Immucor / Terumo Blood and Cell Technologies /

Additional Benefits:

The market estimate (ME) sheet in Excel format /  
3 months of analyst support /

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