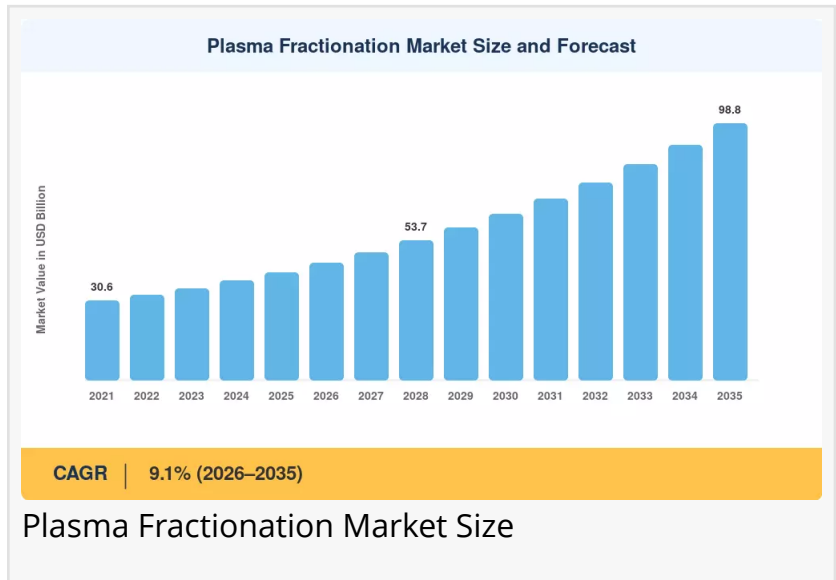


Plasma Fractionation Market to reach USD 98.8 Billion by 2035 at 9.1% CAGR

Plasma Fractionation Market to Surge from USD 45.1 Billion in 2026 to USD 98.8 Billion by 2035-By Rising Immunodeficiency & Autoimmune Disease Prevalence

NY, CA, UNITED STATES, August 12, 2026 /EINPresswire.com/ -- As per Market Research Future, the [global Plasma Fractionation Market size](#) to reach USD 98.8 Billion by 2035 from USD 45.1 Billion in 2026, at a CAGR of 9.1% during the forecast period 2026--2035. The market base was estimated at USD 41.4 Billion in 2025.



The 9.1% CAGR---anchored by structural demand for life-saving plasma-derived therapies rather than discretionary healthcare spending---is driven by three converging forces: rising global prevalence of immunodeficiency and autoimmune disorders that continues to widen the addressable patient base for immunoglobulin and albumin therapy, sustained plasma collection infrastructure expansion that has pulled national health systems from import dependence toward domestic self-sufficiency, and government self-sufficiency mandates that have converted plasma fractionation from a cost center into a strategic health security priority tied to pandemic preparedness and critical-care supply resilience.

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Key Market Trends & Growth Drivers

Rising Immunodeficiency and Autoimmune Disease Prevalence

Primary immunodeficiency diagnoses have increased by an estimated 15% globally over the past

decade, with improved diagnostic tools uncovering previously undiagnosed cases across both pediatric and adult populations. The Jeffrey Modell Foundation's 2024 global survey identified more than 6 million patients receiving immunoglobulin replacement therapy, up from approximately 4.8 million five years earlier. Chronic inflammatory demyelinating polyneuropathy (CIDP) and multifocal motor neuropathy approvals have further broadened the addressable patient base for the Plasma Fractionation Market, creating durable long-term demand.

Plasma Collection Infrastructure Expansion

Legacy cold-ethanol fractionation techniques, long the default purification modality, are giving ground to chromatography-based purification platforms that deliver higher protein recovery yields and improved pathogen safety profiles. Several large-scale facilities commissioned in the U.S. and Europe between 2023 and 2025 adopted continuous-flow chromatography systems, reducing batch processing time by up to 30%. The industry is transitioning from legacy cold-ethanol fractionation toward chromatography-based purification platforms that deliver higher protein recovery yields and improved pathogen safety profiles.

Government Self-Sufficiency Mandates and Value-Based Reimbursement

China's "14th Five-Year Plan for Blood Products" set an explicit target to increase domestic plasma fractionation capacity by 50% by 2027, backing the goal with provincial subsidies exceeding USD 1.2 billion. Brazil's Hemobrás program similarly expanded public-sector fractionation, while India's Central Drugs Standard Control Organization fast-tracked approvals for three new domestic fractionators in 2024. European data from national health technology assessment bodies show that preventing a single immunodeficiency-related hospitalization saves payers approximately USD 45,000–60,000 per patient. This economic incentive has driven hospital formulary committees to prioritize preventive immunoglobulin therapy protocols, shifting procurement budgets toward the Plasma Fractionation Market at the expense of reactive hospitalization spending.

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Market Segment Insights

BY PRODUCT TYPE

Immunoglobulins: Dominant segment with ~45% revenue share in 2025. Reflecting entrenched physician familiarity with intravenous immunoglobulin (IVIg) protocols. Polyvalent IVIg remains the volume leader, though subcutaneous formulations are gaining ground due to patient convenience and reduced infusion-site reactions. Hospital procurement teams treat it as a default first-line agent, and expanding diagnostic coverage has enabled broad adoption even in cost-sensitive emerging markets.

Albumin: Second-largest product segment and forecast to expand at a CAGR of 8.6% through 2035, driven by critical-care and surgical demand in Asia-Pacific hospitals. China alone consumed an estimated 55% of global albumin supply in 2024, creating a structural supply-demand imbalance that continues to drive import volumes and domestic capacity investments.

BY APPLICATION

Neurology: Dominant application segment with ~30% revenue share in 2025. Reflecting the essential role of immunoglobulins in treating CIDP, Guillain-Barré syndrome, and myasthenia gravis. The inherent demand for long-term immunoglobulin therapy in neurology drives sustained dual-channel demand for plasma-derived products.

Immunology: Fastest-growing application segment at 9.8% CAGR (2026--2035). Reflecting improved diagnostic rates that extend the window for primary immunodeficiency treatment. Diagnostic improvements continue to identify previously undiagnosed primary immunodeficiency patients worldwide, creating a larger prevalent population requiring sustained immunoglobulin therapy.

BY END USER

Hospitals and Clinics: Largest segment with ~62% share in 2025. Comprehensive hematology and immunology service lines and inpatient administration requirements dominate volume. Hospitals remain the primary delivery site for intravenous immunoglobulin and albumin therapy due to infusion infrastructure, specialized pharmacy licensing, and critical-care monitoring requirements.

Specialty Infusion Centers: Fastest-growing end-user segment at 11.5% CAGR (2026--2035). Outpatient shift and cost optimization drive demand as subcutaneous immunoglobulin products reduce the need for supervised hospital infusion. Specialty infusion centers and community clinics increasingly prescribe subcutaneous plasma fractionation options to manage hospital capacity.

BY TECHNOLOGY

Centrifugation: Dominant technology with entrenched use in plasma collection and initial separation. Legacy cold-ethanol fractionation techniques anchor institutional processing globally due to decades of clinical evidence and established regulatory pathways.

Chromatography: Fastest-growing technology segment. Driven by new continuous-flow chromatography approvals and expanding purification applications. Several large-scale facilities commissioned in the U.S. and Europe between 2023 and 2025 adopted continuous-flow chromatography systems, reducing batch processing time by up to 30%. The convergence of

membrane-based fractionation with affinity-ligand platforms is creating next-generation purification systems that personalize protein recovery at scale.

Read Detailed Insights:

<https://www.marketresearchfuture.com/reports/plasma-fractionation-market-7397>

Regional Outlook

North America -- Dominant Market (~38% Share, 2025)

The United States generates approximately 82% of North American Plasma Fractionation Market revenue, driven by the world's largest paid plasma donor base, established insurance reimbursement for immunoglobulin therapies, and a mature network of specialty pharmacies---a single policy ecosystem that converted an import-dependent market into one with a structural domestic supply tail. CMS reimbursement for plasma-derived therapies under the hospital outpatient prospective payment system has driven adoption in academic medical centers, while community oncology networks increasingly prescribe subcutaneous immunoglobulin options to manage infusion-center capacity. The US dominates through a combination of high per-patient spending, robust payer coverage, and rapid collection center expansion.

Europe -- Second Largest (USD 11.6 Billion, 2025)

Europe's Plasma Fractionation Market reflects divergent national strategies---Germany leads regionally with strong clinical demand and Biotest/Octapharma capacity, contributing ~24% of regional share, while the UK historically used selective immunoglobulin targeting before broadening coverage through the NHS Immunoglobulin Commissioning Framework at 8.1% CAGR. France contributes through LFB national fractionation mandate at USD 1.6 billion in 2025. Italy contributes ~11% of regional share on Kedrion domestic manufacturing. Spain is growing at 7.9% CAGR on Grifols headquarter operations.

Asia-Pacific -- Fastest-Growing Region (11.2% CAGR, 2026--2035)

Asia-Pacific is the engine of the Plasma Fractionation Market. China holds the largest regional share with ~48% of regional revenue, driven by NMPA donor station expansion and self-sufficiency targets---instantly extending plasma-derived therapy coverage through provincial subsidies exceeding USD 1.2 billion. India is growing at 12.8% CAGR on the back of new fractionation plants by Intas Pharmaceuticals and Reliance Life Sciences. Japan contributes USD 1.4 billion through aging population and high per-capita immunoglobulin use at steady pace. South Korea is growing on Green Cross Corporation domestic supply.

Middle East & Africa -- Emerging Opportunity (CAGR 9.8%, 2026--2035)

The Middle East & Africa is bifurcated between well-funded Gulf states and resource-constrained

Sub-Saharan nations. Saudi Arabia leads the region with Vision 2030 healthcare investment, contributing ~32% of regional share---NEOM health cluster and the UAE's Cleveland Clinic and Mayo Clinic affiliations have created pockets of excellence for plasma-derived therapy. The UAE is growing at 10.2% CAGR on medical tourism and specialty hospital growth. South Africa contributes USD 0.3 billion on South African National Blood Service processing.

South America -- Growing Presence (USD 2.5 Billion, 2025)

Brazil anchors South America's Plasma Fractionation Market at ~58% of regional revenue, with the state-owned Hemobrás fractionation facility in Pernambuco processing domestically collected plasma to reduce import dependence on U.S. and European products, providing a stable demand floor that smooths regional forecasts. Access to advanced fractionation technologies remains limited by capital constraints, though regional governments are exploring toll-manufacturing agreements to improve supply resilience. Argentina is growing at 8.7% CAGR on hospital demand growth and private oncology clinic expansion.

Competitive Landscape and Recent Developments

The Plasma Fractionation Market exhibits medium concentration, with the top five companies collectively holding an estimated 55--65% of global revenue. The Herfindahl-Hirschman Index (HHI) for the sector falls in the moderately concentrated range (~1,200--1,500), reflecting a structure where three dominant multinationals coexist with a diverse tier of regional and specialty players. Barriers to entry remain high given the capital-intensive nature of fractionation facilities, stringent regulatory requirements, and the need for reliable source plasma supply chains.

The competitive landscape is stratified between vertically integrated global leaders serving worldwide plasma fractionation markets, public-sector fractionators capturing national blood service tenders, and specialty hyperimmune developers consolidating niche therapeutic segments.

KEY COMPANIES AND RECENT MILESTONES

CSL Behring (2024--2025): Maintains leadership with Privigen, Hizentra, Albumex, and Haegarda, commanding ~22--26% of global Plasma Fractionation Market revenue. Vertically integrated global leader with the largest plasma collection network. Premium biologic positioning in specialty segments offsets recombinant competition in hemophilia markets.

Grifols (2024--2025): Flebogamma, Gamunex-C, and Albutein reinforce the strong U.S. collection footprint positioning, holding ~16--20% of global revenue. The company benefits from diagnostics integration and expanded collection center capacity.

Takeda (BioLife) (2024--2025): Gammagard, Cuvitru, FEIBA, and Albumin reinforce the broad

portfolio post-Shire acquisition positioning, holding ~12--15% of global revenue. Global reach and subcutaneous immunoglobulin leadership anchor a strong franchise.

Octapharma (2024--2025): Octagam, Nuwiq, and Albunorm reinforce the European-headquartered, 40+ country presence positioning, holding ~8--11% of global revenue.

Kedrion Biopharma (2024--2025): KedriGamma, Albuminex, and RhoGAM reinforce the Italian specialty player positioning, holding ~4--6% of global revenue. Permira-backed expansion drives growth.

China Biologic Products (2024--2025): Human albumin, IVIG, and Factor VIII reinforce the dominant Chinese domestic manufacturer positioning, holding ~3--5% of global revenue.

Future Outlook: 2026--2035

By 2030, precision plasma fractionation theranostics will become the operating system of immunoglobulin and albumin management. The convergence of companion diagnostics and targeted protein therapy will reshape the Plasma Fractionation Market through the late 2020s. By 2030, an estimated 40% of newly diagnosed primary immunodeficiency patients will undergo genetic screening followed by matched immunoglobulin therapy protocols, creating a diagnostic-therapeutic revenue loop.

Continuous chromatography and membrane-based fractionation investments ensure domestic protein recovery yields scale alongside clinical demand. Machine-learning models that integrate genomic, proteomic, and collection biomarkers can recommend optimal sequencing of immunoglobulins, albumin, and coagulation factors for individual patients. Start-ups have raised over USD 800 million in venture funding for biologics decision-support tools since 2023.

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Larry Wilson

WantStats Research And Media Pvt. Ltd.

+1 855-661-4441

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