

Serum Free and Specialty Media Market By Product (CHO Media, HEK Media, Hybridoma Media, Others), By Application (Biopharmaceutical Production, Tissue Engineering and Regenerative Medicine, Others), By End User (Pharmaceutical and Biotechnology Companies, Research and Academic Institutes, Others): Global Opportunity Analysis and Industry Forecast, 2024-2033

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Abstracts

The serum free and specialty media market was valued at \$2.3 billion in 2023 and is estimated to reach \$6.9 billion by 2033, exhibiting a CAGR of 11.6% from 2024 to 2033.

A serum-free and specialty media is a cell culture formulation used in laboratories and pharmaceutical industries to support the growth of different types of cells. This type of media does not contain animal serum such as fetal bovine serum for the supply of growth factors; instead, it is replaced by chemically synthesized alternatives. Serum-free and specialty media is utilized in vaccine development, protein & virus production, and gene therapy.

Expansion of the biopharmaceutical industry to cater to increasing demand for monoclonal antibodies and vaccines has upsurged the requirement for serum-free and specialty media, hence augmenting the development of the market. In addition, several regulatory bodies such as the Food and Drug Administration are stressing the elimination of animal-based product usage in biopharmaceuticals, which is driving the serum-free and specialty media market. A notable trend acquiring traction in the market currently is the development of media for 3D cell culture models, which require

controlled conditions that mimic the in-vivo environment for cell growth. The serum-free and specialty media aligns with the controlled environment requirement of the 3D model as its formulation is particularly created to serve the specialized purpose of each cell culture.

However, achieving the accurate formulation of serum-free and specialty media for optimal cell growth is a time-consuming, complex process that presents scalability challenges and hampers the market growth. On the contrary, rise in the adoption of cell therapies in the medicine sector due to their safety and promising potential for curing diseases is expected to present lucrative opportunities for the serum-free and specialty media market. As per a review article on the National Library of Medicine—the largest biomedical library globally—by the end of the first quarter of 2023, there were more than 100 different approved gene, cell, and RNA therapies across the globe and approximately 3,700 therapies were in the clinical or preclinical development stage. As the media provides an optimized and contamination-free environment for the growth of therapeutic cells, it is projected to witness novel avenues with increasing cell therapy procedures.

Segment Review

The serum-free and specialty media market is segmented into product type, application, end user, and region. By product type, the market is segregated into CHO media, HEK media, hybridoma media, and others. As per application, it is classified into biopharmaceutical production, tissue engineering & regenerative medicine, and others. According to end user, it is classified into pharmaceutical & biopharmaceutical companies, research & academic institutes, and others. Region wise, it is analyzed across North America (U.S., Canada, and Mexico), Europe (Germany, France, UK, Italy, Spain, and rest of Europe), Asia-Pacific (Japan, China, India, Australia, South Korea, and rest of Asia-Pacific), and LAMEA (Brazil, South Africa, Saudi Arabia, and rest of LAMEA).

Key Findings

By product type, the CHO media segment dominated the market in 2023.

As per application, the biopharmaceutical production segment held the highest share of the market in 2023.

According to end user, the pharmaceutical & biotechnology companies segment

acquired a notable stake in the market in 2023.

Region wise, North America was the highest revenue generator in 2023.

Competition Analysis

Major key players that operate in the global serum-free and specialty media market are Thermo Fischer, Merck KGAA, Danaher Corporation (Cytiva), Sartorius AG, Biotechne, Pan-Biotec, Corning, FUJIFILM Irvine Scientific., Lonza, and MP Biomedicals. These major players have adopted various key development strategies such as product launch, expansion, geographical expansion, and investment to strengthen their foothold in the competitive market.

Key Benefits for Stakeholders

This report provides a quantitative analysis of the market segments, current trends, estimations, and dynamics of the serum free and specialty media market analysis from 2023 to 2033 to identify the prevailing serum free and specialty media market opportunities.

The market research is offered along with information related to key drivers, restraints, and opportunities.

Porter's five forces analysis highlights the potency of buyers and suppliers to enable stakeholders make profit-oriented business decisions and strengthen their supplier-buyer network.

In-depth analysis of the serum free and specialty media market segmentation assists to determine the prevailing market opportunities.

Major countries in each region are mapped according to their revenue contribution to the global market.

Market player positioning facilitates benchmarking and provides a clear understanding of the present position of the market players.

The report includes the analysis of the regional as well as global serum free and specialty media market trends, key players, market segments, application areas, and market growth strategies.

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Patient/epidemiology data at country, region, global level

Regulatory Guidelines

Additional company profiles with specific to client's interest

Additional country or region analysis- market size and forecast

Expanded list for Company Profiles

Historic market data

SWOT Analysis

Key Market Segments

By Product

CHO Media

HEK Media

Hybridoma Media

Others

By Application

Biopharmaceutical Production

Tissue Engineering and Regenerative Medicine

Others

By End User

Pharmaceutical and Biotechnology Companies

Research and Academic Institutes

Others

By Region

North America

U.S.

Canada

Mexico

Europe

Germany

France

UK

Italy

Spain

Rest of Europe

Asia-Pacific

Japan

China

India

Australia

South Korea

Rest of Asia-Pacific

LAMEA

Brazil

Saudi Arabia

South Africa

Rest of Asia-Pacific

Key Market Players

Corning Incorporated

MP Biomedicals

Fujifilm Holdings Corporation

Lonza

Merck KGaA

Thermo Fisher Scientific Inc.

Danaher Corporation

PAN-Biotech

Bio-Techne

Sartorius AG

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