

Global Cell Culture Media Market Size Study & Forecast, by Type (Serum-free Media, Classical Media & Salts, Stem Cell Culture Media, Specialty Media, Chemically defined Media, Other Cell Culture Media), by Application (Biopharmaceutical Production, Diagnostics, Drug Screening & Development, Other Applications), by End user, and Regional Analysis, 2023-2030

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Abstracts

Global Cell Culture Media Market is valued at approximately USD 5.34 billion in 2022 and is anticipated to grow with a healthy growth rate of more than 16.0% during the forecast period 2023-2030. Cell culture media, referred to as growth media, is a specialized gel or liquid designed to supply isolated cells with vital nutrients and growth factors required for their survival, division, and functioning in a controlled setting outside their natural organism. It aims to closely mimic the cells' natural environment, allowing researchers and scientists to investigate cell behavior, formulate drugs, and even engineer tissues. The composition of cell culture media is carefully designed to provide the essential nutrients, growth factors, hormones, salts, vitamins, and other critical elements needed for the cells to survive and replicate. The media also contain serum, which is derived from animal blood and provides additional nutrients and growth factors. The global market growth is being driven by factors such as growth in stem cell research, emerging cell culture technologies for cell-based vaccines, surge in production of vaccines, increasing demand for monoclonal antibodies and biosimilars, coupled with the rising emphasis on personalized medicine.

Additionally, the expanding applications of gene therapies, especially in the treatment of

neurological diseases and genetic disorders, are driving the demand for cell culture media. Researchers globally are actively engaged in discovering new therapeutic options, and gene therapy is increasingly being explored in various applications. For instance, gene therapy is utilized experimentally for treating genetic disorders such as Severe Combined Immune Deficiency (SCID), Chronic Granulomatous Disorder (CGD), and hemophilia. Gene therapy relies on viral vectors to deliver genetic sequences into target cells. OptiPEAK, a chemically defined media, is optimized for superior expansion kinetics of HEK293t, supporting clinical and commercial manufacturing in various formats. Moreover, the surge in chronic diseases especially cancer has prompted extensive research projects for advanced treatments. The use of consumables, including cell culture media, in these research initiatives is contributing to market growth by meeting the demand for essential laboratory supplies. According to the World Health Organization, in 2020, it was estimated that nearly 19.3 million new cases of cancer were recorded globally, which is projected to rise and is likely to reach 30.2 million new cases by 2040. Thus, these aforementioned factors are propelling the growth of the Cell Culture Media Market during the estimated period. Moreover, the surge in adoption of the latest cell culture technology to improve cell growth and productivity, as well as growth in stem cell research present various lucrative opportunities over the forecast years. However, the unavailability of infrastructure and ethical concerns regarding cell biology research are challenging the market growth throughout the forecast period of 2023-2030.

The key regions considered for the Global Cell Culture Media Market study include Asia Pacific, North America, Europe, Latin America, and Middle East & Africa. North America dominated the market in 2022 owing to the expansion of the biotechnology and pharmaceutical sectors, the increasing number of vaccines based on cell culture receiving approvals, the rising prevalence of illnesses such as cancer, and the growing funding and investments made in cell-based research. Whereas, Asia Pacific is expected to grow at the highest CAGR over the forecast years. The increasing development of biopharmaceuticals, oncology, and stem cell research, as well as the surge in demand for life science research are significantly propelling the market demand across the region. Furthermore, the rise in the number of strategic activities by key industry players to expand their presence in the Asia Pacific countries is also presenting high growth prospects for market expansion. For instance, in December 2021, Fujifilm Irvine Scientific, Inc. started the construction of its new bioprocessing center in China, intending to ensure cell culture media optimization support for biotherapeutic drug development, vaccines, and advanced therapies. For instance, in December 2021, Fujifilm Irvine Scientific, Inc. announced the construction of a new bioprocessing center in China, which aims to offer comprehensive support for cell culture media optimization

in the development of biotherapeutic drugs, vaccines, and advanced therapies.

Major market players included in this report are:

Thermo Fisher Scientific, Inc. (US)

Merck KGaA (Germany)

Danaher Corporation (US)

Sartorius AG (Germany)

Corning Incorporated (US)

FUJIFILM Irvine Scientific, Inc. (Japan)

Lonza Group (Switzerland)

Becton, Dickinson and Company (US)

Miltenyi Biotec (Germany)

HiMedia Laboratories Pvt. Ltd. (India)

Recent Developments in the Market:

In January 2022, Cytiva and Nucleus Biologics, LLC. entered into a collaborative agreement focusing on tailored media formulation and comprehensive solutions for the gene and cell therapy sector.

In September 2023, Celltrion allocated an investment of USD 94.5 million for the establishment of a facility in Songdo, Incheon, with an annual production capacity of 8 million vials. This facility is anticipated to raise the bioreactor capacity to 600,000 L and is set to become operational in 2027.

In March 2023, Samsung Biologics declared its plans to initiate the construction of a fifth plant, boasting a capacity of 180,000 liters. Upon its completion, this addition is likely to solidify Samsung Biologics' position as the leader in global biomanufacturing capacity, reaching a total of 784,000 liters.

In July 2021, Sartorius AG unveiled its acquisition of Xell AG, a specialist in cell culture. Xell AG is engaged in the development, production, and marketing of media and feed supplements tailored for cell cultures in the production of viral vectors utilized in gene therapeutics and vaccines.

In January 2021, Cytiva introduced the HiScreen Fibro Prisma product designed for the early stages of monoclonal antibody (mAb) purification process development. This fiber-based protein A platform expedited the company's research and development initiatives and enhanced productivity in large-scale manufacturing environments.

Global Cell Culture Media Market Report Scope:

Historical Data – 2020 - 2021

Base Year for Estimation – 2022

Forecast period - 2023-2030

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Segments Covered - Type, Application, End user, Region

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent up to 8 analyst's working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values to the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within countries involved in the study.

The report also caters detailed information about the crucial aspects such as driving factors & challenges which will define the future growth of the market. Additionally, it also incorporates potential opportunities in micro markets for stakeholders to invest along with the detailed analysis of competitive landscape and product offerings of key players. The detailed segments and sub-segment of the market are explained below:

By Type:

Serum-free Media

Classical Media & Salts

Stem Cell Culture Media

Specialty Media

Chemically defined Media

Other Cell Culture Media

By Application:

Biopharmaceutical Production

Diagnostics

Drug Screening & Development

Tissue Engineering & Regenerative Medicine

Other Applications

By End user:

Pharmaceutical & Biotechnology Companies

Hospitals & Diagnostic Laboratories

Research & Academic Institutes

Other End Users

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

Saudi Arabia

South Africa

Rest of Middle East & Africa

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