

Global Biosafety Cabinet Market: Analysis By Type, By Type of Material Managed, By Category, By Application, By Region Size and Trends with Impact of COVID-19 and Forecast up to 2028

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Abstracts

The global biosafety cabinet market in 2022 stood at US\$240.41 million and is likely to reach US\$377.07 million by 2028. Biosafety Cabinets (BSCs) are intricately designed enclosures, which play a crucial role in laboratories by offering a secure environment for handling potentially hazardous materials. They are engineered to protect both the researcher and the integrity of the research materials from any form of contamination. This is achieved through a combination of filtered airflows, enclosed workspaces, and proper ventilation, ensuring a contamination-free space for sensitive lab work, and safeguarding the well-being of the individuals conducting the experiments.

Originating from the necessity of microbiological research in the mid-20th century, Biosafety Cabinets (BSCs) have seen a substantial increase in demand in recent times. This surge is attributed to a global focus on studying infectious diseases, the development of advanced research infrastructures, and a heightened awareness of the importance of laboratory safety. BSCs have become indispensable tools in ensuring safe and contamination-free research environments, playing a pivotal role in a wide array of scientific investigations. As the world continues to emphasize microbial research and prioritize safety in laboratories, the advancements and widespread adoption of BSCs are expected to remain paramount, solidifying their crucial role in the future of scientific research and public health. The global biosafety cabinet market is projected to grow at a CAGR of 7.79% during the forecast period of 2023-2028.

Market Segmentation Analysis:

By Type: The market report has segmented the global biosafety cabinet market into six segments namely, Class I Biosafety Cabinet, Class II Type A2 and Class II Type B1, Class II Type B2 Biosafety Cabinet, Class III Biosafety Cabinet, Customized Cabinets, and Others. In 2022, the Class II Type A2 and Class II Type B1 Biosafety Cabinet segment dominates the market primarily due to their versatile and adaptive designs that cater to a wide array of research applications. Their capability to provide comprehensive protection against a broad spectrum of pathogens makes them the preferred choice in various research settings, ensuring both user safety and sample integrity. Further, the Class II Type A2 and Class II Type B1 Biosafety Cabinet segment, during the forecasted period of 2023-2028, is expected to be the fastest-growing segment, owing to its unparalleled adaptability to various research applications and exceptional safety features.

By Type of Material Managed: Based on the type of material managed, the global biosafety cabinet market can be divided into two segments namely, biological materials, and toxic materials. In 2022, the biological materials segment is the largest segment, attributed to the escalating volume of biological research, increased focus on infectious diseases, and biotechnological advancements, making this type of research more prevalent and wide-ranging than specialized toxic substance research.

By Category: The global biosafety cabinet market can be categorized into three main segments based on category, namely, Work Trays, Side Panel Construction, and Accessories. In 2022, the Work Trays segment is the largest and the fastest growing segment, attributed to the increasing need for organized, efficient, and contamination-free workspaces within biosafety cabinets, which is vital for enhancing productivity and ensuring systematic research processes. Work trays provide a dedicated space for tools and samples, directly influencing the daily functioning and usability of biosafety cabinets, making them a crucial component for laboratories worldwide.

By Application: Based on the application, the global biosafety cabinet market can be divided into five segments namely, healthcare and disease management, biopharmaceuticals, environmental monitoring, food quality assurance, and others. In 2022, the healthcare and disease management segment holds the largest market share, attributed to the escalating global disease burden and the crucial need for sterile environments in healthcare settings for effective disease management and accurate diagnostics. On the other hand, during the forecasted period of 2023-2028, the environmental monitoring segment is likely to be the fastest-growing segment, owing to escalating global challenges like climate change, rapid industrialization, and the need for stringent environmental monitoring to address pollution and prevent health hazards,

especially in emerging economies.

By Region: According to this report, the global biosafety cabinet market can be divided into five major regions: North America (The US, Canada, and Mexico), Europe (Germany, the UK, France, Italy, Spain, and the Rest of Europe), Asia Pacific (China, Japan, India, South Korea, and the Rest of Asia Pacific), Middle East & Africa, and Latin America. In 2022, North America, led by the US, dominates the global biosafety cabinet market. This dominance is driven by advanced biotechnological and pharmaceutical research infrastructure, strict safety regulations, and significant government funding from institutions like the CDC and NIH. The US's role in pharmaceutical innovation and its commitment to biomedical research further strengthen its market position.

The Asia Pacific Biosafety Cabinet market is expected to grow at the fastest CAGR from 2023 to 2028, driven by the expanding pharmaceutical and biotech sectors, with China's massive biotech investments and India's rapid industry growth playing significant roles. India, in particular, is poised to be the fastest-growing market, propelled by its burgeoning biotech sector, government initiatives like 'Make in India,' and increasing demand for advanced research infrastructure.

Global Biosafety Cabinet Market Dynamics:

Growth Drivers: The surge in funding for life science research by government bodies and private enterprises has significantly driven the demand for biosafety cabinets. These cabinets are indispensable for maintaining secure laboratory conditions, safeguarding meticulous research activities, and preserving the integrity of complex experiments, thereby playing a crucial role in advancing scientific discovery and innovation. Further, the market is expected to grow owing to growth in the biopharmaceuticals industry, increasing prevalence of infectious diseases, integration of Internet of Things (IoT), regulatory and compliance standards, expansion of diagnostic and testing laboratories, integration of energy-efficient designs & user-centric ergonomic improvements, adoption of touch screen controls, integration with Laboratory Information Systems (LIS), advanced filtration and material innovations, etc. in recent years.

Challenges: Biosafety cabinets are essential for research safety, but their high costs pose a significant challenge. The upfront investment and ongoing maintenance expenses can be prohibitive for smaller labs and those in developing countries. This limits the accessibility and utilization of these vital safety tools in regions and institutions with constrained budgets. Additionally, other factors like lack of skilled personnel and

training, etc. are other challenges to the market.

Market Trends: The global biosafety cabinet market is set to grow significantly from 2023 to 2028, with the development of personalized medicine and therapeutics playing a pivotal role. This medical approach tailors treatments to individual patient characteristics, necessitating extensive R&D and the safe handling of biological materials. Biosafety cabinets provide a secure environment for this, ensuring both sample and researcher safety. The demand for these cabinets is expected to rise as the healthcare sector increasingly shifts towards personalized and precision medicine, requiring more advanced laboratory setups and stringent safety protocols. More trends in the market are believed to grow the biosafety cabinet market during the forecasted period, which may include emerging markets, advancements in Artificial Intelligence (AI) and Machine Learning (ML), increasing adoption of robotics in laboratories, advancements in nanotechnology and microfluidics, rise in space and deep-sea exploration, progressions in cell and gene therapy research, surge in safety protocols in academic institutions, integration of biometrics and advanced security, environmentally friendly disposal mechanisms, etc.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic fueled a surge in demand for biosafety cabinets, crucial for safely researching contagious pathogens, despite global supply chain disruptions and price instability, particularly in South America. Innovations like IoT-integrated cabinets in Germany and increased research investments worldwide led manufacturers to ramp up production. This underscored the need for preparedness and solid research infrastructure, suggesting a continued growth trend for the biosafety cabinet market.

The COVID-19 pandemic significantly transformed the biosafety cabinet market, vital for uncontaminated research. Post-pandemic, increased awareness, digital advancements, and more R&D funding continue to drive changes, with global collaboration, enhanced after-sales service, innovative designs, and environmental concerns shaping the market's future.

Competitive Landscape and Recent Developments:

The biosafety cabinet market is fragmented, characterized by the presence of numerous players, ranging from multinational giants to regional entities. This diverse landscape means that while certain players like Thermo Fisher Scientific, NuAire, and Esco Micro Pte. Ltd. hold significant market shares, many smaller companies and newcomers also

compete, catering to niche or regional requirements. This fragmentation often leads to continuous innovation. A notable example of this innovative drive is Haier Biomedical's recent product launch, where they introduced new biological safety cabinets, enhancing their product range and catering to a broader audience in the life sciences sector.

Further, the key players in the biosafety cabinet market are:

Thermo Fisher Scientific Inc.

Kewaunee Scientific Corporation

Azbil Corporation

Esco Lifesciences Group

Labconco Corporation

Berner International GmbH

EW Healthcare Partners (Germfree Laboratories, Inc.)

Biobase Biodustry Co Ltd

Haier Group (Haier Biomedical)

The Baker Company

NuAire Inc.

Clean Air Products Inc.

Product-wise, the global biosafety cabinet market is marked by a variety of offerings catering to different laboratory needs. Thermo Fisher Scientific, for instance, provides a wide range of biosafety cabinets, ensuring versatility, durability, and advanced safety features. Becton, Dickinson and Company (BD) also offers a spectrum of biosafety cabinets, designed to meet various research requirements. Collaborations and technological advancements play a significant role, as seen in Baker's partnership initiatives to enhance cabinet functionalities. Mergers and acquisitions, such as Labconco's strategic moves, have a notable impact on market dynamics. New product launches, including NuAire's latest biosafety cabinet models, continue to refresh and diversify the market, keeping major players on their toes.?

Contents

1. EXECUTIVE SUMMARY

2. INTRODUCTION

2.1 Biosafety Cabinet: An Overview

2.1.1 Definition of Biosafety Cabinet

2.1.2 Classification and Overview of Biosafety Cabinets

2.2 Biosafety Cabinet Segmentation: An Overview

2.2.1 Biosafety Cabinet Segmentation

3. GLOBAL MARKET ANALYSIS

3.1 Global Biosafety Cabinet Market: An Analysis

3.1.1 Global Biosafety Cabinet Market: An Overview

3.1.2 Global Biosafety Cabinet Market by Value

3.1.3 Global Biosafety Cabinet Market by Type (Class I Biosafety Cabinet, Class II Type A2 and Class II Type B1, Class II Type B2 Biosafety Cabinet, Class III Biosafety Cabinet, Customized Cabinets, and Others)

3.1.4 Global Biosafety Cabinet Market by Type of Material Managed (Biological Materials, and Toxic Materials)

3.1.5 Global Biosafety Cabinet Market by Category (Work Trays, Side Panel Construction, and Accessories)

3.1.6 Global Biosafety Cabinet Market by Application (Healthcare and Disease Management, Biopharmaceuticals, Environmental Monitoring, Food Quality Assurance, and Others)

3.1.7 Global Biosafety Cabinet Market by Region (North America, Europe, Asia Pacific, Middle East & Africa, and Latin America)

3.2 Global Biosafety Cabinet Market: Type Analysis

3.2.1 Global Biosafety Cabinet Market by Type: An Overview

3.2.2 Global Class I Biosafety Cabinet Market by Value

3.2.3 Global Class II Type A2 and Class II Type B1 Biosafety Cabinet Market by Value

3.2.4 Global Class II Type B2 Biosafety Cabinet Market by Value

3.2.5 Global Class III Biosafety Cabinet Market by Value

3.2.6 Global Customized Biosafety Cabinet Market by Value

3.2.7 Global Other Biosafety Cabinet Market by Value

3.3 Global Biosafety Cabinet Market: Type of Material Managed Analysis

- 3.3.1 Global Biosafety Cabinet Market by Type of Material Managed: An Overview
- 3.3.2 Global Biological Materials Biosafety Cabinet Market by Value
- 3.3.3 Global Toxic Materials Biosafety Cabinet Market by Value
- 3.4 Global Biosafety Cabinet Market: Category Analysis
 - 3.4.1 Global Biosafety Cabinet Market by Category: An Overview
 - 3.4.2 Global Work Trays Biosafety Cabinet Market by Value
 - 3.4.3 Global Side Panel Construction Biosafety Cabinet Market by Value
 - 3.4.4 Global Accessories Biosafety Cabinet Market by Value
- 3.5 Global Biosafety Cabinet Market: Application Analysis
 - 3.5.1 Global Biosafety Cabinet Market by Application: An Overview
 - 3.5.2 Global Healthcare and Disease Management Biosafety Cabinet Market by Value
 - 3.5.3 Global Biopharmaceuticals Biosafety Cabinet Market by Value
 - 3.5.4 Global Environmental Monitoring Biosafety Cabinet Market by Value
 - 3.5.5 Global Food Quality Assurance Biosafety Cabinet Market by Value
 - 3.5.6 Global Other Applications Biosafety Cabinet Market by Value

4. REGIONAL MARKET ANALYSIS

- 4.1 North America Biosafety Cabinet Market: An Analysis
 - 4.1.1 North America Biosafety Cabinet Market: An Overview
 - 4.1.2 North America Biosafety Cabinet Market by Value
 - 4.1.3 North America Biosafety Cabinet Market by Region (The US, Canada, and Mexico)
 - 4.1.4 The US Biosafety Cabinet Market by Value
 - 4.1.5 Canada Biosafety Cabinet Market by Value
 - 4.1.6 Mexico Biosafety Cabinet Market by Value
- 4.2 Europe Biosafety Cabinet Market: An Analysis
 - 4.2.1 Europe Biosafety Cabinet Market: An Overview
 - 4.2.2 Europe Biosafety Cabinet Market by Value
 - 4.2.3 Europe Biosafety Cabinet Market by Region (Germany, the UK, France, Italy, Spain, and the Rest of Europe)
 - 4.2.4 Germany Biosafety Cabinet Market by Value
 - 4.2.5 UK Biosafety Cabinet Market by Value
 - 4.2.6 France Biosafety Cabinet Market by Value
 - 4.2.7 Italy Biosafety Cabinet Market by Value
 - 4.2.8 Spain Biosafety Cabinet Market by Value
 - 4.2.9 Rest of Europe Biosafety Cabinet Market by Value
- 4.3 Asia Pacific Biosafety Cabinet Market: An Analysis
 - 4.3.1 Asia Pacific Biosafety Cabinet Market: An Overview

- 4.3.2 Asia Pacific Biosafety Cabinet Market by Value
- 4.3.3 Asia Pacific Biosafety Cabinet Market by Region (China, Japan, India, South Korea, and the Rest of Asia Pacific)
- 4.3.4 China Biosafety Cabinet Market by Value
- 4.3.5 Japan Biosafety Cabinet Market by Value
- 4.3.6 India Biosafety Cabinet Market by Value
- 4.3.7 South Korea Biosafety Cabinet Market by Value
- 4.3.8 Rest of Asia Pacific Biosafety Cabinet Market by Value
- 4.4 Middle East and Africa Biosafety Cabinet Market: An Analysis
 - 4.4.1 Middle East and Africa Biosafety Cabinet Market: An Overview
 - 4.4.2 Middle East and Africa Biosafety Cabinet Market by Value
- 4.5 Latin America Biosafety Cabinet Market: An Analysis
 - 4.5.1 Latin America Biosafety Cabinet Market: An Overview
 - 4.5.2 Latin America Biosafety Cabinet Market by Value

5. IMPACT OF COVID-19

- 5.1 Impact of COVID-19 on Global Biosafety Cabinet Market
- 5.2 Post-COVID-19 Impact on Global Biosafety Cabinet Market

6. MARKET DYNAMICS

- 6.1 Growth Drivers
 - 6.1.1 Growth in Biopharmaceuticals Industry
 - 6.1.2 Rising Investment in Life Science Research
 - 6.1.3 Integration of Internet of Things (IoT)
 - 6.1.4 Increasing Prevalence of Infectious Diseases
 - 6.1.5 Regulatory and Compliance Standards
 - 6.1.6 Expansion of Diagnostic and Testing Laboratories
 - 6.1.7 Integration of Energy-Efficient Designs & User-Centric Ergonomic Improvements
 - 6.1.8 Adoption of Touch Screen Controls
 - 6.1.9 Integration with Laboratory Information Systems (LIS)
 - 6.1.10 Advanced Filtration and Material Innovations
- 6.2 Challenges
 - 6.2.1 High Cost and Maintenance of Biosafety Cabinets
 - 6.2.2 Lack of Skilled Personnel and Training
- 6.3 Market Trends
 - 6.3.1 Emerging Markets
 - 6.3.2 Advancements in Artificial Intelligence (AI) and Machine Learning (ML)

- 6.3.3 Increasing Adoption of Robotics in Laboratories
- 6.3.4 Development of Personalized Medicine and Therapeutics
- 6.3.5 Advancements in Nanotechnology and Microfluidics
- 6.3.6 Rise in Space and Deep-sea Exploration
- 6.3.7 Progressions in Cell and Gene Therapy Research
- 6.3.8 Surge in Safety Protocols in Academic Institutions
- 6.3.9 Integration of Biometrics and Advanced Security
- 6.3.10 Environmentally Friendly Disposal Mechanisms

7. COMPETITIVE LANDSCAPE

- 7.1 Global Biosafety Cabinet Market: Competitive Landscape
- 7.2 Global Biosafety Cabinet Market Players: Product Offerings

8. COMPANY PROFILES

- 8.1 Thermo Fisher Scientific Inc.
 - 8.1.1 Business Overview
 - 8.1.2 Segments
 - 8.1.3 Business Strategies
- 8.2 Kewaunee Scientific Corporation
 - 8.2.1 Business Overview
 - 8.2.2 Business Segment
 - 8.2.3 Business Strategies
- 8.3 Azbil Corporation
 - 8.3.1 Business Overview
 - 8.3.2 Operating Segments
 - 8.3.3 Business Strategies
- 8.4 Esco Lifesciences Group
 - 8.4.1 Business Overview
 - 8.4.2 Business Strategies
- 8.5 Labconco Corporation
 - 8.5.1 Business Overview
 - 8.5.2 Business Strategies
- 8.6 Berner International GmbH
 - 8.6.1 Business Overview
 - 8.6.2 Business Strategy
- 8.7 EW Healthcare Partners (Germfree Laboratories, Inc.)
 - 8.7.1 Business Overview

- 8.7.2 Business Strategy
- 8.8 Biobase Biodust Co Ltd
 - 8.8.1 Business Overview
 - 8.8.2 Business Strategy
- 8.9 Haier Group (Haier Biomedical)
 - 8.9.1 Business Overview
 - 8.9.2 Business Strategy
- 8.10 The Baker Company
 - 8.10.1 Business Overview
- 8.11 NuAire Inc.
 - 8.11.1 Business Overview
- 8.12 Clean Air Products Inc.
 - 8.12.1 Business Overview

List Of Figures

LIST OF FIGURES

Figure 1: Classification and Overview of Biosafety Cabinets

Figure 2: Biosafety Cabinet Segmentation

Figure 3: Global Biosafety Cabinet Market by Value; 2018-2022 (US\$ Million)

Figure 4: Global Biosafety Cabinet Market by Value; 2023-2028 (US\$ Million)

Figure 5: Global Biosafety Cabinet Market by Type; 2022 (Percentage, %)

Figure 6: Global Biosafety Cabinet Market by Type of Material Managed; 2022 (Percentage, %)

Figure 7: Global Biosafety Cabinet Market by Category; 2022 (Percentage, %)

Figure 8: Global Biosafety Cabinet Market by Application; 2022 (Percentage, %)

Figure 9: Global Biosafety Cabinet Market by Region; 2022 (Percentage, %)

Figure 10: Global Class I Biosafety Cabinet Market by Value, 2018-2022 (US\$ Million)

Figure 11: Global Class I Biosafety Cabinet Market by Value, 2023-2028 (US\$ Million)

Figure 12: Global Class II Type A2 and Class II Type B1 Biosafety Cabinet Market by Value, 2018-2022 (US\$ Million)

Figure 13: Global Class II Type A2 and Class II Type B1 Biosafety Cabinet Market by Value, 2023-2028 (US\$ Million)

Figure 14: Global Class II Type B2 Biosafety Cabinet Market by Value, 2018-2022 (US\$ Million)

Figure 15: Global Class II Type B2 Biosafety Cabinet Market by Value, 2023-2028 (US\$ Million)

Figure 16: Global Class III Biosafety Cabinet Market by Value, 2018-2022 (US\$ Million)

Figure 17: Global Class III Biosafety Cabinet Market by Value, 2023-2028 (US\$ Million)

Figure 18: Global Customized Biosafety Cabinet Market by Value, 2018-2022 (US\$ Million)

Figure 19: Global Customized Biosafety Cabinet Market by Value, 2023-2028 (US\$ Million)

Figure 20: Global Other Biosafety Cabinet Market by Value, 2018-2022 (US\$ Million)

Figure 21: Global Other Biosafety Cabinet Market by Value, 2023-2028 (US\$ Million)

Figure 22: Global Biological Materials Biosafety Cabinet Market by Value, 2018-2022 (US\$ Million)

Figure 23: Global Biological Materials Biosafety Cabinet Market by Value, 2023-2028 (US\$ Million)

Figure 24: Global Toxic Materials Biosafety Cabinet Market by Value, 2018-2022 (US\$ Million)

Figure 25: Global Toxic Materials Biosafety Cabinet Market by Value, 2023-2028 (US\$ Million)

Million)

Figure 26: Global Work Trays Biosafety Cabinet Market by Value, 2018-2022 (US\$ Million)

Figure 27: Global Work Trays Biosafety Cabinet Market by Value, 2023-2028 (US\$ Million)

Figure 28: Global Side Panel Construction Biosafety Cabinet Market by Value, 2018-2022 (US\$ Million)

Figure 29: Global Side Panel Construction Biosafety Cabinet Market by Value, 2023-2028 (US\$ Million)

Figure 30: Global Accessories Biosafety Cabinet Market by Value, 2018-2022 (US\$ Million)

Figure 31: Global Accessories Biosafety Cabinet Market by Value, 2023-2028 (US\$ Million)

Figure 32: Global Healthcare and Disease Management Biosafety Cabinet Market by Value, 2018-2022 (US\$ Million)

Figure 33: Global Healthcare and Disease Management Biosafety Cabinet Market by Value, 2023-2028 (US\$ Million)

Figure 34: Global Biopharmaceuticals Biosafety Cabinet Market by Value, 2018-2022 (US\$ Million)

Figure 35: Global Biopharmaceuticals Biosafety Cabinet Market by Value, 2023-2028 (US\$ Million)

Figure 36: Global Environmental Monitoring Biosafety Cabinet Market by Value, 2018-2022 (US\$ Million)

Figure 37: Global Environmental Monitoring Biosafety Cabinet Market by Value, 2023-2028 (US\$ Million)

Figure 38: Global Food Quality Assurance Biosafety Cabinet Market by Value, 2018-2022 (US\$ Million)

Figure 39: Global Food Quality Assurance Biosafety Cabinet Market by Value, 2023-2028 (US\$ Million)

Figure 40: Global Other Applications Biosafety Cabinet Market by Value, 2018-2022 (US\$ Million)

Figure 41: Global Other Applications Biosafety Cabinet Market by Value, 2023-2028 (US\$ Million)

Figure 42: North America Biosafety Cabinet Market by Value; 2018-2022 (US\$ Million)

Figure 43: North America Biosafety Cabinet Market by Value; 2023-2028 (US\$ Million)

Figure 44: North America Biosafety Cabinet Market by Region; 2022 (Percentage, %)

Figure 45: The US Biosafety Cabinet Market by Value, 2018-2022 (US\$ Million)

Figure 46: The US Biosafety Cabinet Market by Value, 2023-2028 (US\$ Million)

Figure 47: Canada Biosafety Cabinet Market by Value, 2018-2022 (US\$ Million)

Figure 48: Canada Biosafety Cabinet Market by Value, 2023-2028 (US\$ Million)

Figure 49: Mexico Biosafety Cabinet Market by Value, 2018-2022 (US\$ Million)

Figure 50: Mexico Biosafety Cabinet Market by Value, 2023-2028 (US\$ Million)

Figure 51: Europe Biosafety Cabinet Market by Value; 2018-2022 (US\$ Million)

Figure 52: Europe Biosafety Cabinet Market by Value; 2023-2028 (US\$ Million)

Figure 53: Europe Biosafety Cabinet Market by Region; 2022 (Percentage, %)

Figure 54: Germany Biosafety Cabinet Market by Value; 2018-2022 (US\$ Million)

Figure 55: Germany Biosafety Cabinet Market by Value; 2023-2028 (US\$ Million)

Figure 56: UK Biosafety Cabinet Market by Value; 2018-2022 (US\$ Million)

Figure 57: UK Biosafety Cabinet Market by Value; 2023-2028 (US\$ Million)

Figure 58: France Biosafety Cabinet Market by Value; 2018-2022 (US\$ Million)

Figure 59: France Biosafety Cabinet Market by Value; 2023-2028 (US\$ Million)

Figure 60: Italy Biosafety Cabinet Market by Value; 2018-2022 (US\$ Million)

Figure 61: Italy Biosafety Cabinet Market by Value; 2023-2028 (US\$ Million)

Figure 62: Spain Biosafety Cabinet Market by Value; 2018-2022 (US\$ Million)

Figure 63: Spain Biosafety Cabinet Market by Value; 2023-2028 (US\$ Million)

Figure 64: Rest of Europe Biosafety Cabinet Market by Value; 2018-2022 (US\$ Million)

Figure 65: Rest of Europe Biosafety Cabinet Market by Value; 2023-2028 (US\$ Million)

Figure 66: Asia Pacific Biosafety Cabinet Market by Value; 2018-2022 (US\$ Million)

Figure 67: Asia Pacific Biosafety Cabinet Market by Value; 2023-2028 (US\$ Million)

Figure 68: Asia Pacific Biosafety Cabinet Market by Region; 2022 (Percentage, %)

Figure 69: China Biosafety Cabinet Market by Value; 2018-2022 (US\$ Million)

Figure 70: China Biosafety Cabinet Market by Value; 2023-2028 (US\$ Million)

Figure 71: Japan Biosafety Cabinet Market by Value; 2018-2022 (US\$ Million)

Figure 72: Japan Biosafety Cabinet Market by Value; 2023-2028 (US\$ Million)

Figure 73: India Biosafety Cabinet Market by Value; 2018-2022 (US\$ Million)

Figure 74: India Biosafety Cabinet Market by Value; 2023-2028 (US\$ Million)

Figure 75: South Korea Biosafety Cabinet Market by Value; 2018-2022 (US\$ Million)

Figure 76: South Korea Biosafety Cabinet Market by Value; 2023-2028 (US\$ Million)

Figure 77: Rest of Asia Pacific Biosafety Cabinet Market by Value; 2018-2022 (US\$ Million)

Figure 78: Rest of Asia Pacific Biosafety Cabinet Market by Value; 2023-2028 (US\$ Million)

Figure 79: Middle East and Africa Biosafety Cabinet Market by Value; 2018-2022 (US\$ Million)

Figure 80: Middle East and Africa Biosafety Cabinet Market by Value; 2023-2028 (US\$ Million)

Figure 81: Latin America Biosafety Cabinet Market by Value; 2018-2022 (US\$ Million)

Figure 82: Latin America Biosafety Cabinet Market by Value; 2023-2028 (US\$ Million)

Figure 83: Global Biopharmaceuticals Market; 2020-2030 (US\$ Billion)

Figure 84: Global Life Sciences Research & Development Expenditures; 2018-2022 (US\$ Billion)

Figure 85: Global Internet of Things (IoT) in Healthcare Market; 2023-2028 (US\$ Billion)

Figure 86: Emerging Asia-Pacific Countries Current Health Expenditure as Share of GDP; 2018-2022 (Percentage, %)

Figure 87: Global Artificial Intelligence (AI) in Healthcare Market; 2021-2030 (US\$ Billion)

Figure 88: Thermo Fisher Scientific Inc. Revenue by Segment; 2022 (Percentage, %)

Figure 89: Kewaunee Scientific Corporation Revenue from External Customers by Business Segment; 2023 (Percentage, %)

Figure 90: Azbil Corporation Sales by Segments, 2022 (Percentage, %)

Table 1: Global Biosafety Cabinet Market Players: Product Offerings

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