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Global Single-use Bioprocessing Probes Sensors Market 2023

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Abstracts

The global market for single-use bioprocessing probes and sensors was valued at USD 1.14 billion in 2022 and is projected to reach USD 2.58 billion by 2029, with a CAGR of 12.0%. These probes and sensors offer an effective alternative to traditional methods in biopharmaceutical development and manufacturing, especially in continuous bioprocessing. Single-use bioreactors and fermenters, utilizing disposable plastic bags in metal containers, are increasingly adopted in the biopharmaceutical industry. They provide benefits such as pre-sterilization, elimination of classified environments, reduced risk of cross-contamination, lower costs, increased efficiency, and greater flexibility. Vendors are developing advanced products, including non-invasive and smart probes and sensors, to meet demand and enhance functionality. The COVID-19 pandemic has further heightened the demand for single-use bioprocessing probes and sensors, particularly in vaccine, cell and gene therapy, and monoclonal antibody manufacturing. The vaccine segment is expected to have the highest CAGR due to the urgent need for vaccine development. Overall, the market is growing and presents opportunities for stakeholders in the biopharmaceutical industry.

The report covers market size and growth, segmentation, regional breakdowns, competitive landscape, trends and strategies for global single-use bioprocessing probes sensors market. It presents a quantitative analysis of the market to enable stakeholders to capitalize on the prevailing market opportunities. The report also identifies top segments for opportunities and strategies based on market trends and leading competitors' approaches.

Market Segmentation
The market is segmented based on various factors, including type of sensor, workflow, application, end-user, and region.

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Product: conductivity sensors, flow meters and sensors, oxygen sensors, pH sensors, pressure sensors, temperature sensors, others
Workflow: downstream, upstream
Application: cell therapies, monoclonal antibodies, vaccines, others
End user: biopharmaceutical manufacturers, CMOs and CDMOs, research institutes

Segmentation by Geography
North America – US, Canada
Europe – Germany, France, UK, Italy, Spain, Switzerland
APAC - China, Japan, India, South Korea, Australia, Colombia
Latin America – Brazil, Mexico, Argentina
Middle East & Africa – South Africa, Saudi Arabia, Turkey, UAE

CMOs play a crucial role in the biopharmaceutical industry and attract significant investments. Market leaders possess financial resources, strong reputations, and a willingness to take risks. Dominant CMOs achieve scale and specialize in operations, offering high economic returns. pH sensors, commonly used in single-use bioprocessing, have the largest market share at 23.5%. The upstream segment generates the highest revenue of $4.6 billion in 2022, fueled by the adoption of single-use bioreactors. Downstream processing, particularly affinity capture and purification, is intensive and costly. Limited use of single-use systems results in smaller market revenue. Efforts to expand single-use systems in downstream processing are expected to drive growth.

R&D investment in biopharmaceutical products promotes the adoption of single-use bioreactors, especially in North America and Europe. North America leads in revenue, with collaborations and key players like Avantor, High Purity New England, and Merck expanding the market. The growing demand and usage of single-use bioreactors drive market growth in North America and Europe. Latin America, the Middle East, and Africa offer growth opportunities. In the Asia-Pacific (APAC) region, high R&D spending drives the adoption of single-use bioprocessing technologies, projecting a 13.5% CAGR for the APAC market.

Competitive Landscape
The global single-use bioprocessing market is moderately competitive and offers significant growth opportunities for vendors. Dominant companies in this market include Thermo Fisher Scientific Inc., Sartorius AG, Danaher Corporation, and Merck KGaA. These companies are profiled in this report: ABER Instruments Ltd., Avantor, Inc., Broadley-James Corporation, CerCell A/S, Cole-Parmer Instrument Company (Antylia

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Scientific), Compagnie de Saint-Gobain S.A., Danaher Corporation, Distek, Inc., Emerson Electric Co., ESI Technologies Ltd., Hamilton Company, High Purity New England, Inc., Levitronix GmbH, Liquidyne Process Technologies, Inc., Malema Engineering Corporation (PSG Dover), Merck KGaA, Mettler Toledo International Inc., Parker Hannifin Corporation, PreSens Precision Sensing GmbH, Sartorius AG, SONOTEC GmbH, Thermo Fisher Scientific Inc., among others.

Scope of the Report
To analyze and forecast the market size of the global single-use bioprocessing probes sensors market.
To classify and forecast the global single-use bioprocessing probes sensors market based on product, workflow, application, end user, region.
To identify drivers and challenges for the global single-use bioprocessing probes sensors market.
To examine competitive developments such as mergers & acquisitions, agreements, collaborations and partnerships, etc., in the global single-use bioprocessing probes sensors market.
To identify and analyze the profile of leading players operating in the global single-use bioprocessing probes sensors market.

Why Choose This Report
Gain a reliable outlook of the global single-use bioprocessing probes sensors market forecasts from 2023 to 2029 across scenarios.
Identify growth segments for investment.
Stay ahead of competitors through company profiles and market data.
The market estimate for ease of analysis across scenarios in Excel format.
Strategy consulting and research support for three months.
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