

Global CD34+ Cell Selection Equipment Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global CD34+ Cell Selection Equipment market size is expected to reach \$ 152 million by 2032, rising at a market growth of 8.5% CAGR during the forecast period (2026-2032).

CD34+ cell selection equipment refers to instruments used to perform the separation, enrichment, or selection of CD34+ hematopoietic stem and progenitor cells. The core function of this type of equipment is to obtain enriched CD34+ cell populations from complex samples such as bone marrow, cord blood, mobilized peripheral blood, leukapheresis products, or PBMCs through hardware-based processes including anti-CD34 labeling systems, magnetic separation, column-based separation, column-free separation, or bag-based magnetic separation.

From an industrial positioning perspective, CD34+ cell selection equipment is located at the intersection of life science instruments, cell therapy manufacturing equipment, and hematopoietic stem cell transplantation support equipment. Its main uses include clinical graft processing, research-grade CD34+ cell separation, cell therapy process development, sample processing before gene editing, and GMP-grade cell preparation workflows. Technological development is moving from early manual magnetic racks and open manual operations toward closed, automated, traceable, high-throughput, and GMP-compatible equipment systems. In the current market, the number of equipment suppliers is significantly smaller than the number of reagent and consumable suppliers. Global equipment supply is mainly concentrated among Miltenyi Biotec, STEMCELL Technologies, Applied Cells, and a small number of magnetic separation device suppliers. Compared with kits and magnetic beads, the equipment market is smaller in scale and has lower purchase frequency, but the value per unit is higher, customer validation cycles are longer, and barriers to entry are also higher. The upstream

segment of this type of equipment mainly includes magnet components, precision pumps and valves, fluidic control modules, sensors, touchscreens and embedded control systems, disposable tubing adaptation structures, electromechanical integrated components, quality management systems, and GMP validation capabilities. The reliability of upstream equipment directly affects cell recovery rate, cell viability, batch-to-batch consistency, sterility assurance, and process traceability. Downstream customers mainly include hematopoietic stem cell transplantation centers, hematology and oncology departments, cell therapy companies, gene-editing therapy companies, cell process development laboratories, CROs, CDMOs, and large research institutions. Downstream demand is not equivalent to the total number of hematopoietic stem cell transplantations, because only some transplantation and cell therapy workflows require CD34+ cell selection equipment. Nevertheless, HCT and cell therapy activities still form an important demand base. The EBMT report shows that HCT activity in Europe and surrounding regions reached 47,731 cases in 2023, with allogeneic HCT increasing by 7.8% year on year and CAR-T therapy increasing by 52.5%, indicating that transplantation and advanced cell therapy activities are still expanding. In terms of policy, the U.S. FDA has approved the CliniMACS CD34 Reagent System for specific AML patient settings, and gene therapy products based on enriched CD34+ cell populations, such as CASGEVY, have also been approved. These developments are increasing the importance of clinical-grade, closed, and verifiable cell processing equipment. Future trends in pricing, production volume, and market size will differ from those of reagents and consumables. Equipment prices are unlikely to decline rapidly like ordinary consumables, because their value mainly comes from hardware reliability, software control, closed processing workflows, GMP compatibility, after-sales service, validation documentation, and customer process lock-in. However, research-grade automated separators and semi-automated magnetic separation devices may experience gradual unit price declines due to intensified competition and domestic substitution. In terms of production volume, annual shipments of clinical-grade closed equipment will continue to show the characteristics of small batches and high unit prices, while shipments of research-grade automation equipment and process development equipment are expected to grow faster, mainly driven by cell therapy process development, CD34+ gene-editing research, and laboratory automation demand. This market is not a large-scale consumables market, but a small-scale, high-barrier specialized equipment market that is gradually expanding alongside the automation of cell therapy manufacturing.

This report studies the global CD34+ Cell Selection Equipment production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for CD34+ Cell Selection Equipment and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of CD34+ Cell Selection Equipment that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global CD34+ Cell Selection Equipment total production and demand, 2021-2032, (Units)

Global CD34+ Cell Selection Equipment total production value, 2021-2032, (USD Million)

Global CD34+ Cell Selection Equipment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global CD34+ Cell Selection Equipment consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: CD34+ Cell Selection Equipment domestic production, consumption, key domestic manufacturers and share

Global CD34+ Cell Selection Equipment production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global CD34+ Cell Selection Equipment production by Technology Route, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global CD34+ Cell Selection Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global CD34+ Cell Selection Equipment market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Miltenyi Biotec GmbH, STEMCELL Technologies Inc., Thermo Fisher Scientific Inc., Applied Cells, Inc., Akadeum Life Sciences, Inc., Bio-Techne Corporation, Revvity, Inc., GenScript Biotech Corporation, Beaver Biomedical Engineering Co., Ltd., Suzhou Xinxie Biotechnology Co., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World CD34+ Cell Selection Equipment market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Technology Route, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global CD34+ Cell Selection Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global CD34+ Cell Selection Equipment Market, Segmentation by Technology Route:

Column-Based Immunomagnetic Selection

Column-Free Immunomagnetic Selection

Buoyancy-Activated Microbubble Sorting

Global CD34+ Cell Selection Equipment Market, Segmentation by Product Delivery Form:

Closed Clinical System

Laboratory Selection Kit

Platform-Based Selection Instrument

Global CD34+ Cell Selection Equipment Market, Segmentation by CD34+ Cell Acquisition Workflow:

Direct Positive Selection

Direct Negative Enrichment

Pre-Enrichment Followed By Positive Selection

Global CD34+ Cell Selection Equipment Market, Segmentation by Application:

Clinical Transplant Cell Preparation

Research-Use Cell Isolation

Process Development And Translational Research

Companies Profiled:

Miltenyi Biotec GmbH

STEMCELL Technologies Inc.

Thermo Fisher Scientific Inc.

Applied Cells, Inc.

Akadeum Life Sciences, Inc.

Bio-Techne Corporation

Revvity, Inc.

GenScript Biotech Corporation

Beaver Biomedical Engineering Co., Ltd.

Suzhou Xinxie Biotechnology Co., Ltd.

APExBIO Technology LLC

Key Questions Answered:

1. How big is the global CD34+ Cell Selection Equipment market?
2. What is the demand of the global CD34+ Cell Selection Equipment market?
3. What is the year over year growth of the global CD34+ Cell Selection Equipment market?
4. What is the production and production value of the global CD34+ Cell Selection Equipment market?
5. Who are the key producers in the global CD34+ Cell Selection Equipment market?
6. What are the growth factors driving the market demand?

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