

# Global Cell Expansion Supporting Equipment Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/GC0BB9AE7539EN.html>

Date: May 2026

Pages: 184

Price: US\$ 4,480.00 (Single User License)

ID: GC0BB9AE7539EN

## Abstracts

The global Cell Expansion Supporting Equipment market size is expected to reach \$ 4836 million by 2032, rising at a market growth of 11.6% CAGR during the forecast period (2026-2032).

Cell Expansion Supporting Equipment refers to specialized equipment systems used to provide a controlled in vitro or ex vivo environment for adherent culture, suspension culture, perfusion culture, and scale-up of cells. Its core function is to maintain cell viability, proliferation rate, phenotype consistency, and batch-to-batch reproducibility during process scale-up. In physical form, such equipment typically consists of a main control unit, a culture chamber or bioreactor, drive and mixing modules, temperature-control modules, gas supply and exchange modules, fluid paths with pumps and valves, online sensors, and data acquisition/software systems; in closed platforms, sterile connection, sampling, feeding, perfusion, and waste-management components are often integrated as well. By mainstream configuration, it includes rocking systems, stirred bioreactor systems, fixed-bed systems, hollow-fiber systems, gas-exchange culture systems, and integrated automated closed expansion platforms. Its operating principle is to create a suitable microenvironment for different cell types through controlled heat and mass transfer together with feedback control of temperature, pH, dissolved oxygen, carbon dioxide, shear stress, nutrient supply, and metabolite removal, thereby enabling cell expansion from research scale to pilot scale and further to GMP manufacturing scale.

Growth opportunities for Cell Expansion Supporting Equipment are primarily driven by the commercialization of cell and gene therapies, higher process standardization requirements, and the ongoing migration from open manual operations to closed automated manufacturing. As the number of approved cell therapies increases and

development pipelines continue to expand, both clinical-stage and commercial-stage manufacturing demand better consistency, lower contamination risk, more complete electronic records, and stronger batch comparability. This is steadily increasing the value of automated expansion platforms, single-use bioreactors, online monitoring tools, and perfusion-control equipment. From the manufacturing perspective, equipment is no longer merely a culture vessel; it has become critical infrastructure directly linked to process development, regulatory compliance, GMP scale-up, and cost control. Suppliers capable of offering closed, modular, digitalized, and verifiable process packages therefore have a stronger chance of being designed into projects.

The main risks of the market are concentrated in process uncertainty, commercialization success rates, validation costs, and supply-chain lock-in. Different cell types, donor sources, and culture routes respond very differently to shear, oxygen transfer, adherent carriers, perfusion strategies, and harvesting methods, which means scale-up is not a simple linear extension of bench-scale parameters. For users, equipment purchase is only one part of total investment; the real barriers lie in process development, validation, consumable systems, software compliance, facility fit, and post-approval change control. For suppliers, a platform that is too closed or too dependent on proprietary consumables may also face customer resistance on cost and flexibility. In addition, although the CGT field remains highly attractive, not every indication will scale commercially at the same pace, and equipment demand will continue to be shaped by financing conditions, clinical outcomes, reimbursement, and capacity utilization.

Downstream demand is moving from ?being able to expand cells? toward ?being able to scale reliably, manufacture compliantly, and replicate processes across multiple sites.? The strongest current demand comes from cell therapy and advanced therapy manufacturing, upstream biopharmaceutical process development, CDMO/IDMO platforms, and large hospitals or research institutes with translational capabilities. In terms of demand structure, closed systems, automated sampling and feeding, digital batch records, compact parallel development platforms, single-use fluid paths, and low-labor solutions are receiving more attention. From a technical-route perspective, suspension-cell systems remain more favorable for large-scale manufacturing, while adherent-cell systems continue to drive upgrades in fixed-bed, microcarrier, and dedicated carrier-based reactors. Regionally, North America and Europe remain the main centers for high-end platforms and commercial demand, while China, Japan, Singapore, and Israel are increasingly active in localized production, engineering-based cost reduction, and new platform adoption.

This report studies the global Cell Expansion Supporting Equipment production,

demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Cell Expansion Supporting 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 Cell Expansion Supporting Equipment that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Cell Expansion Supporting Equipment total production and demand, 2021-2032, (Units)

Global Cell Expansion Supporting Equipment total production value, 2021-2032, (USD Million)

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

Global Cell Expansion Supporting Equipment consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Cell Expansion Supporting Equipment domestic production, consumption, key domestic manufacturers and share

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

Global Cell Expansion Supporting Equipment production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Cell Expansion Supporting Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Cell Expansion Supporting 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 Danaher (Cytiva), Thermo Fisher Scientific, Merck, Sartorius, Lonza, Corning, Terumo Blood and Cell Technologies, Miltenyi Biotec, Getinge, Eppendorf, 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 Cell Expansion Supporting Equipment market

**Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (USD/Unit) by manufacturer, by Type, 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 Cell Expansion Supporting Equipment Market, By Region:**

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

**Global Cell Expansion Supporting Equipment Market, Segmentation by Type:**

Flow cytometer

Cell counters

Centrifuges

Others

## Global Cell Expansion Supporting Equipment Market, Segmentation by Process Architecture:

Rocking-motion bioreactor systems

Stirred-tank bioreactor systems

Fixed-bed bioreactor systems

Hollow-fiber bioreactor systems

Orbital-shaken bioreactor systems

Gas-permeable static culture systems

Others

## Global Cell Expansion Supporting Equipment Market, Segmentation by Product Contact Format:

Vessel-based systems

Bag-based systems

Cartridge-based systems

Cassette-based systems

Fiber-module-based systems

Plate or stack-based systems

Others

## Global Cell Expansion Supporting Equipment Market, Segmentation by Single-Use Level:

Reusable stainless-steel systems

Hybrid systems

Single-use systems

Global Cell Expansion Supporting Equipment Market, Segmentation by Application:

Regenerative Medicine and Stem Cell Research

Cancer and Cell-based Research

Others

Companies Profiled:

Danaher (Cytiva)

Thermo Fisher Scientific

Merck

Sartorius

Lonza

Corning

Terumo Blood and Cell Technologies

Miltenyi Biotec

Getinge

Eppendorf

Donaldson (Solaris Biotech)

GEA

ABEC

PHC

Esco Lifesciences Group

Univercells Technologies

Ori Biotech

Cellares

PBS Biotech

Wilson Wolf

Adva Biotechnology

ABLE Biott

Kuhner

Distek

ZETA

INFORS HT

Tofflon

T&J Bioengineering (Shanghai)

Shanghai Zhichu Instrument

Applitech Biological Technology

**Key Questions Answered:**

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

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