

Global Process Chromatography System Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Process Chromatography System market size was valued at US\$ 1674 million in 2025 and is forecast to a readjusted size of US\$ 2716 million by 2032 with a CAGR of 7.1% during review period.

Process chromatography systems are integrated automation platforms used in biopharmaceutical and high-value chemical manufacturing for downstream separation and purification workflows. They combine fluid delivery pumps, multi-position valve assemblies, UV, conductivity, pH, pressure, and flow sensors, fraction collectors, cleaning-in-place (CIP) or single-use flow paths, control software, and data logging modules into a unified system. These systems are designed to interface with chromatography columns, membrane adsorbers, or multi-column units in downstream processes. System configurations are defined by flow path architecture, operating mode, scale range, and pressure class, and are widely used in the capture, intermediate purification, and polishing of monoclonal antibodies, recombinant proteins, vaccines, viral vectors, nucleic acids, peptides, and plasma-derived products. Their core value lies in enabling precise gradient control, batch-to-batch reproducibility, GMP traceability, and seamless scalability from process development to commercial manufacturing. The estimated gross margin is approximately 42%.

Demand for process chromatography systems is primarily driven by expanding biopharmaceutical production capacity and downstream purification bottlenecks. While established modalities such as monoclonal antibodies, bispecific antibodies, and fusion proteins still rely on multi-step chromatography (affinity, ion exchange, hydrophobic interaction, and size exclusion), emerging modalities such as vaccines, viral vectors,

nucleic acid therapeutics, and peptides place higher demands on low dead volume, material compatibility, and rapid changeover capability. As a result, customers increasingly prioritize automation level, data integrity, cleaning validation, single-use flow path compatibility, and regulatory documentation, rather than simply flow rate or column volume.

Continuous chromatography and multi-column systems are becoming key directions in high-value bioprocessing. Economic drivers such as improved resin utilization (especially Protein A), reduced buffer consumption, and smaller facility footprint are accelerating adoption of multi-column capture systems, in-line dilution, buffer preparation integration, and process analytical technology (PAT) interfaces. Single-use systems are increasingly favored in clinical manufacturing, multi-product facilities, and CDMO environments, while stainless-steel systems remain dominant in large-scale, high-throughput, and long-life validated processes.

Chinese manufacturers are gradually entering through pilot-scale systems, customized skids, and partial production-scale platforms. However, large GMP projects continue to require proven control software stability, reliability of critical components, validated documentation systems, and global service capabilities. The market is therefore evolving into a tiered structure: international suppliers dominate high-end continuous and large commercial installations, while domestic vendors expand share through customization, faster delivery, cost advantages, and localized service support.

This report is a detailed and comprehensive analysis for global Process Chromatography System market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Process Chromatography System market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Process Chromatography System market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling

prices (US\$/Unit), 2021-2032

Global Process Chromatography System market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Process Chromatography System market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Process Chromatography System

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Process Chromatography System market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Cytiva, Sartorius, Merck, Thermo Fisher Scientific, Repligen, Bio-Rad, YMC, Asahi Kasei Bioprocess, Sepragen, KNAUER, etc.

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

Market Segmentation

Process Chromatography System market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Reusable Stainless Steel System

Single-use System

Hybrid Flow Path System

Custom Skid System

Market segment by Operating Mode

Batch Chromatography System

Multi-column Continuous System

Simulated Moving Bed System

Preparative HPLC System

Market segment by Scale Class

Process Development System

Pilot Scale System

Clinical Manufacturing System

Commercial Manufacturing System

Market segment by Pressure Class

Low-pressure System

Medium-pressure System

High-pressure System

Market segment by Application

Monoclonal Antibody Purification

Recombinant Protein Purification

Vaccine and Viral Vector Purification

Nucleic Acid and Oligonucleotide Purification

Peptide and Small Molecule Purification

Plasma and Blood Product Purification

Major players covered

Cytiva

Sartorius

Merck

Thermo Fisher Scientific

Repligen

Bio-Rad

YMC

Asahi Kasei Bioprocess

Sepragen

KNAUER

Labomatic

Waters

Shimadzu

Agilent

Gilson

Hanbon

Tofflon

TruKing

Austar

Morimatsu LifeSciences

JYSS Bio

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Process Chromatography System product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Process Chromatography System, with price, sales quantity, revenue, and global market share of Process Chromatography System from 2021 to 2026.

Chapter 3, the Process Chromatography System competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Process Chromatography System breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Process Chromatography System market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Process Chromatography System.

Chapter 14 and 15, to describe Process Chromatography System sales channel, distributors, customers, research findings and conclusion.

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