

Global Process Chromatography System Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Process Chromatography System market size is expected to reach \$ 2716 million by 2032, rising at a market growth of 7.1% CAGR during the forecast period (2026-2032).

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 studies the global Process Chromatography System production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Process Chromatography System 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 Process Chromatography System that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Process Chromatography System total production and demand, 2021-2032, (Units)

Global Process Chromatography System total production value, 2021-2032, (USD Million)

Global Process Chromatography System production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Process Chromatography System consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Process Chromatography System domestic production, consumption, key domestic manufacturers and share

Global Process Chromatography System production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Process Chromatography System production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Process Chromatography System production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Process Chromatography System 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Process Chromatography System 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 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 Process Chromatography System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Process Chromatography System Market, Segmentation by Type:

Reusable Stainless Steel System

Single-use System

Hybrid Flow Path System

Custom Skid System

Global Process Chromatography System Market, Segmentation by Operating Mode:

Batch Chromatography System

Multi-column Continuous System

Simulated Moving Bed System

Preparative HPLC System

Global Process Chromatography System Market, Segmentation by Scale Class:

Process Development System

Pilot Scale System

Clinical Manufacturing System

Commercial Manufacturing System

Global Process Chromatography System Market, Segmentation by Pressure Class:

Low-pressure System

Medium-pressure System

High-pressure System

Global Process Chromatography System Market, Segmentation 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

Companies Profiled:

Cytiva

Sartorius

Merck

Thermo Fisher Scientific

Repligen

Bio-Rad

YMC

Asahi Kasei Bioprocess

Sepragen

KNAUER

Labomatic

Waters

Shimadzu

Agilent

Gilson

Hanbon

Tofflon

Truiking

Austar

Morimatsu LifeSciences

JYSS Bio

Key Questions Answered:

1. How big is the global Process Chromatography System market?
2. What is the demand of the global Process Chromatography System market?
3. What is the year over year growth of the global Process Chromatography System market?

4. What is the production and production value of the global Process Chromatography System market?
5. Who are the key producers in the global Process Chromatography System market?
6. What are the growth factors driving the market demand?

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