

Global Single-Use Bioprocess Tubing 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 Single-Use Bioprocess Tubing market size was valued at US\$ 391 million in 2025 and is forecast to a readjusted size of US\$ 546 million by 2032 with a CAGR of 4.9% during review period.

In 2025, global production capacity for single-use bioprocess tubing reached approximately 35 million meters, with actual production around 24 million meters. The average global market price is around US\$ 12 per meter, and the market gross margin mainly ranges between 30% and 50%. Single-use bioprocess tubing is a flexible, sterile tubing used in disposable bioprocessing systems for the transfer of liquids, buffers, cell cultures, and media. Designed for single-use applications, these tubing systems eliminate cross-contamination risks, reduce cleaning and validation requirements, and enhance operational flexibility in biopharmaceutical manufacturing. They are widely applied in cell culture, fermentation, filtration, mixing, and filling processes, supporting modular and scalable production workflows while maintaining sterility and compliance with regulatory standards.

The upstream of the single-use bioprocess tubing industry mainly includes medical-grade polymers, elastomers, fittings, connectors, and sterilization materials. Midstream focuses on tubing extrusion, assembly with connectors, sterilization, quality control, and validation to meet GMP and regulatory compliance. Downstream serves biopharmaceutical manufacturers, CDMOs, and research facilities, integrating tubing into single-use assemblies, bioreactors, and fluid transfer systems. The industry features high regulatory requirements, specialized precision manufacturing, and increasing adoption of modular and disposable production systems, with service and customization opportunities growing alongside.

The single-use bioprocess tubing market is driven by the growth of biologics, vaccines, and cell and gene therapies, as well as the industry's shift toward disposable and modular manufacturing systems. Single-use tubing reduces the risk of cross-contamination, minimizes cleaning and validation efforts, and enables flexible, scalable production workflows. Regulatory compliance, including FDA, EMA, and ISO standards, strongly influences material selection, design, and sterilization methods. Technological innovations, such as low-extractables materials, pre-sterilized assemblies, and integrated tubing sets, further stimulate adoption. The expansion of contract manufacturing, continuous bioprocessing, and flexible production facilities has increased demand for reliable, prevalidated tubing solutions. Additionally, rising focus on operational efficiency and cost reduction supports the replacement of traditional stainless-steel piping with single-use systems, ensuring stable and growing demand for high-quality bioprocess tubing worldwide.

This report is a detailed and comprehensive analysis for global Single-Use Bioprocess Tubing 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 Single-Use Bioprocess Tubing market size and forecasts, in consumption value (\$ Million), sales quantity (Meters), and average selling prices (US\$/Meters), 2021-2032

Global Single-Use Bioprocess Tubing market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Meters), and average selling prices (US\$/Meters), 2021-2032

Global Single-Use Bioprocess Tubing market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Meters), and average selling prices (US\$/Meters), 2021-2032

Global Single-Use Bioprocess Tubing market shares of main players, shipments in revenue (\$ Million), sales quantity (Meters), and ASP (US\$/Meters), 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 Single-Use Bioprocess Tubing
- 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 Single-Use Bioprocess Tubing 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 Saint-Gobain, Merck Millipore, Sartorius, Thermo Fisher Scientific, Danaher (Cytiva), Pall, Repligen, Avantor, Entegris, Watson-Marlow, etc.

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

Market Segmentation

Single-Use Bioprocess Tubing 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

Silicone Tubing

TPE Tubing

PVC Tubing

PE Tubing

Others

Market segment by Sterilization Method

Gamma-Sterilized Tubing

Autoclavable Tubing

Market segment by Application

Biopharmaceutical Companies

Vaccine Manufacturing Organizations

Cell and Gene Therapy Companies

CDMO / CMO Institutions

Research Institutes and Laboratories

Major players covered

Saint-Gobain

Merck Millipore

Sartorius

Thermo Fisher Scientific

Danaher (Cytiva)

Pall

Repligen

Avantor

Entegris

Watson-Marlow

Corning

Freudenberg Medical

DuPont

Trelleborg Medical Solutions

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 Single-Use Bioprocess Tubing product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Single-Use Bioprocess Tubing, with price, sales quantity, revenue, and global market share of Single-Use Bioprocess Tubing from 2021 to 2026.

Chapter 3, the Single-Use Bioprocess Tubing competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Single-Use Bioprocess Tubing 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 Single-Use Bioprocess Tubing 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 Single-Use Bioprocess Tubing.

Chapter 14 and 15, to describe Single-Use Bioprocess Tubing sales channel, distributors, customers, research findings and conclusion.

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