

Global Single-Use Bioprocess Tubing Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Single-Use Bioprocess Tubing market size is expected to reach \$ 546 million by 2032, rising at a market growth of 4.9% CAGR during the forecast period (2026-2032).

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 studies the global Single-Use Bioprocess Tubing production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Single-Use Bioprocess Tubing 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 Single-Use Bioprocess Tubing that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Single-Use Bioprocess Tubing total production and demand, 2021-2032, (Meters)

Global Single-Use Bioprocess Tubing total production value, 2021-2032, (USD Million)

Global Single-Use Bioprocess Tubing production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Meters), (based on production site)

Global Single-Use Bioprocess Tubing consumption by region & country, CAGR, 2021-2032 & (Meters)

U.S. VS China: Single-Use Bioprocess Tubing domestic production, consumption, key domestic manufacturers and share

Global Single-Use Bioprocess Tubing production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Meters)

Global Single-Use Bioprocess Tubing production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Meters)

Global Single-Use Bioprocess Tubing production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Meters)

This report profiles key players in the global Single-Use Bioprocess Tubing 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Single-Use Bioprocess Tubing market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Meters) and average price (US\$/Meters) 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 Single-Use Bioprocess Tubing Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Single-Use Bioprocess Tubing Market, Segmentation by Type:

Silicone Tubing

TPE Tubing

PVC Tubing

PE Tubing

Others

Global Single-Use Bioprocess Tubing Market, Segmentation by Sterilization Method:

Gamma-Sterilized Tubing

Autoclavable Tubing

Global Single-Use Bioprocess Tubing Market, Segmentation by Application:

Biopharmaceutical Companies

Vaccine Manufacturing Organizations

Cell and Gene Therapy Companies

CDMO / CMO Institutions

Research Institutes and Laboratories

Companies Profiled:

Saint-Gobain

Merck Millipore

Sartorius

Thermo Fisher Scientific

Danaher (Cytiva)

Pall

Repligen

Avantor

Entegris

Watson-Marlow

Corning

Freudenberg Medical

DuPont

Trelleborg Medical Solutions

Key Questions Answered:

1. How big is the global Single-Use Bioprocess Tubing market?
2. What is the demand of the global Single-Use Bioprocess Tubing market?
3. What is the year over year growth of the global Single-Use Bioprocess Tubing market?
4. What is the production and production value of the global Single-Use Bioprocess Tubing market?
5. Who are the key producers in the global Single-Use Bioprocess Tubing market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Ultra-Thin Reinforced Glass Introduction
- 1.2 World Ultra-Thin Reinforced Glass Supply & Forecast
 - 1.2.1 World Ultra-Thin Reinforced Glass Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Ultra-Thin Reinforced Glass Production (2021-2032)
 - 1.2.3 World Ultra-Thin Reinforced Glass Pricing Trends (2021-2032)
- 1.3 World Ultra-Thin Reinforced Glass Production by Region (Based on Production Site)
 - 1.3.1 World Ultra-Thin Reinforced Glass Production Value by Region (2021-2032)
 - 1.3.2 World Ultra-Thin Reinforced Glass Production by Region (2021-2032)
 - 1.3.3 World Ultra-Thin Reinforced Glass Average Price by Region (2021-2032)
 - 1.3.4 North America Ultra-Thin Reinforced Glass Production (2021-2032)
 - 1.3.5 Europe Ultra-Thin Reinforced Glass Production (2021-2032)
 - 1.3.6 China Ultra-Thin Reinforced Glass Production (2021-2032)
 - 1.3.7 Japan Ultra-Thin Reinforced Glass Production (2021-2032)
 - 1.3.8 India Ultra-Thin Reinforced Glass Production (2021-2032)
 - 1.3.9 Southeast Asia Ultra-Thin Reinforced Glass Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Ultra-Thin Reinforced Glass Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Ultra-Thin Reinforced Glass Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Ultra-Thin Reinforced Glass Demand (2021-2032)
- 2.2 World Ultra-Thin Reinforced Glass Consumption by Region
 - 2.2.1 World Ultra-Thin Reinforced Glass Consumption by Region (2021-2026)
 - 2.2.2 World Ultra-Thin Reinforced Glass Consumption Forecast by Region (2027-2032)
- 2.3 United States Ultra-Thin Reinforced Glass Consumption (2021-2032)
- 2.4 China Ultra-Thin Reinforced Glass Consumption (2021-2032)
- 2.5 Europe Ultra-Thin Reinforced Glass Consumption (2021-2032)
- 2.6 Japan Ultra-Thin Reinforced Glass Consumption (2021-2032)
- 2.7 South Korea Ultra-Thin Reinforced Glass Consumption (2021-2032)
- 2.8 ASEAN Ultra-Thin Reinforced Glass Consumption (2021-2032)
- 2.9 India Ultra-Thin Reinforced Glass Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Ultra-Thin Reinforced Glass Production Value by Manufacturer (2021-2026)
- 3.2 World Ultra-Thin Reinforced Glass Production by Manufacturer (2021-2026)
- 3.3 World Ultra-Thin Reinforced Glass Average Price by Manufacturer (2021-2026)
- 3.4 Ultra-Thin Reinforced Glass Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Ultra-Thin Reinforced Glass Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Ultra-Thin Reinforced Glass in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Ultra-Thin Reinforced Glass in 2025
- 3.6 Ultra-Thin Reinforced Glass Market: Overall Company Footprint Analysis
 - 3.6.1 Ultra-Thin Reinforced Glass Market: Region Footprint
 - 3.6.2 Ultra-Thin Reinforced Glass Market: Company Product Type Footprint
 - 3.6.3 Ultra-Thin Reinforced Glass Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: Ultra-Thin Reinforced Glass Production Value Comparison
 - 4.1.1 United States VS China: Ultra-Thin Reinforced Glass Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Ultra-Thin Reinforced Glass Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Ultra-Thin Reinforced Glass Production Comparison
 - 4.2.1 United States VS China: Ultra-Thin Reinforced Glass Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Ultra-Thin Reinforced Glass Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Ultra-Thin Reinforced Glass Consumption Comparison
 - 4.3.1 United States VS China: Ultra-Thin Reinforced Glass Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Ultra-Thin Reinforced Glass Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Ultra-Thin Reinforced Glass Manufacturers and Market Share,

2021-2026

4.4.1 United States Based Ultra-Thin Reinforced Glass Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Ultra-Thin Reinforced Glass Production Value (2021-2026)

4.4.3 United States Based Manufacturers Ultra-Thin Reinforced Glass Production (2021-2026)

4.5 China Based Ultra-Thin Reinforced Glass Manufacturers and Market Share

4.5.1 China Based Ultra-Thin Reinforced Glass Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Ultra-Thin Reinforced Glass Production Value (2021-2026)

4.5.3 China Based Manufacturers Ultra-Thin Reinforced Glass Production (2021-2026)

4.6 Rest of World Based Ultra-Thin Reinforced Glass Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Ultra-Thin Reinforced Glass Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Ultra-Thin Reinforced Glass Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Ultra-Thin Reinforced Glass Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Ultra-Thin Reinforced Glass Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Physical Tempering

5.2.2 Chemical Tempering

5.3 Market Segment by Type

5.3.1 World Ultra-Thin Reinforced Glass Production by Type (2021-2032)

5.3.2 World Ultra-Thin Reinforced Glass Production Value by Type (2021-2032)

5.3.3 World Ultra-Thin Reinforced Glass Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY SHAPE

6.1 World Ultra-Thin Reinforced Glass Market Size Overview by Shape: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Shape

- 6.2.1 Flat Ultra-thin Tempered Glass
- 6.2.2 Curved Ultra-thin Tempered Glass
- 6.3 Market Segment by Shape
 - 6.3.1 World Ultra-Thin Reinforced Glass Production by Shape (2021-2032)
 - 6.3.2 World Ultra-Thin Reinforced Glass Production Value by Shape (2021-2032)
 - 6.3.3 World Ultra-Thin Reinforced Glass Average Price by Shape (2021-2032)

7 MARKET ANALYSIS BY TEMPERATURE DEGREE

- 7.1 World Ultra-Thin Reinforced Glass Market Size Overview by Temperature Degree: 2021 VS 2025 VS 2032
- 7.2 Segment Introduction by Temperature Degree
 - 7.2.1 Fully Tempered Ultra-thin Glass
 - 7.2.2 Semi-Tempered Ultra-thin Glass
- 7.3 Market Segment by Temperature Degree
 - 7.3.1 World Ultra-Thin Reinforced Glass Production by Temperature Degree (2021-2032)
 - 7.3.2 World Ultra-Thin Reinforced Glass Production Value by Temperature Degree (2021-2032)
 - 7.3.3 World Ultra-Thin Reinforced Glass Average Price by Temperature Degree (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

- 8.1 World Ultra-Thin Reinforced Glass Market Size Overview by Application: 2021 VS 2025 VS 2032
- 8.2 Segment Introduction by Application
 - 8.2.1 Construction
 - 8.2.2 Automotive
 - 8.2.3 Consumer Electronics
 - 8.2.4 Others
- 8.3 Market Segment by Application
 - 8.3.1 World Ultra-Thin Reinforced Glass Production by Application (2021-2032)
 - 8.3.2 World Ultra-Thin Reinforced Glass Production Value by Application (2021-2032)
 - 8.3.3 World Ultra-Thin Reinforced Glass Average Price by Application (2021-2032)

9 COMPANY PROFILES

- 9.1 JNTC

- 9.1.1 JNTC Details
- 9.1.2 JNTC Major Business
- 9.1.3 JNTC Ultra-Thin Reinforced Glass Product and Services
- 9.1.4 JNTC Ultra-Thin Reinforced Glass Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.1.5 JNTC Recent Developments/Updates
- 9.1.6 JNTC Competitive Strengths & Weaknesses
- 9.2 NSC
 - 9.2.1 NSC Details
 - 9.2.2 NSC Major Business
 - 9.2.3 NSC Ultra-Thin Reinforced Glass Product and Services
 - 9.2.4 NSC Ultra-Thin Reinforced Glass Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.2.5 NSC Recent Developments/Updates
 - 9.2.6 NSC Competitive Strengths & Weaknesses
- 9.3 SOLAR GLASS
 - 9.3.1 SOLAR GLASS Details
 - 9.3.2 SOLAR GLASS Major Business
 - 9.3.3 SOLAR GLASS Ultra-Thin Reinforced Glass Product and Services
 - 9.3.4 SOLAR GLASS Ultra-Thin Reinforced Glass Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.3.5 SOLAR GLASS Recent Developments/Updates
 - 9.3.6 SOLAR GLASS Competitive Strengths & Weaknesses
- 9.4 Schoot
 - 9.4.1 Schoot Details
 - 9.4.2 Schoot Major Business
 - 9.4.3 Schoot Ultra-Thin Reinforced Glass Product and Services
 - 9.4.4 Schoot Ultra-Thin Reinforced Glass Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.4.5 Schoot Recent Developments/Updates
 - 9.4.6 Schoot Competitive Strengths & Weaknesses
- 9.5 JNS
 - 9.5.1 JNS Details
 - 9.5.2 JNS Major Business
 - 9.5.3 JNS Ultra-Thin Reinforced Glass Product and Services
 - 9.5.4 JNS Ultra-Thin Reinforced Glass Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.5.5 JNS Recent Developments/Updates
 - 9.5.6 JNS Competitive Strengths & Weaknesses

9.6 Tibbo glass

9.6.1 Tibbo glass Details

9.6.2 Tibbo glass Major Business

9.6.3 Tibbo glass Ultra-Thin Reinforced Glass Product and Services

9.6.4 Tibbo glass Ultra-Thin Reinforced Glass Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 Tibbo glass Recent Developments/Updates

9.6.6 Tibbo glass Competitive Strengths & Weaknesses

9.7 Corning

9.7.1 Corning Details

9.7.2 Corning Major Business

9.7.3 Corning Ultra-Thin Reinforced Glass Product and Services

9.7.4 Corning Ultra-Thin Reinforced Glass Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 Corning Recent Developments/Updates

9.7.6 Corning Competitive Strengths & Weaknesses

9.8 AGC

9.8.1 AGC Details

9.8.2 AGC Major Business

9.8.3 AGC Ultra-Thin Reinforced Glass Product and Services

9.8.4 AGC Ultra-Thin Reinforced Glass Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 AGC Recent Developments/Updates

9.8.6 AGC Competitive Strengths & Weaknesses

9.9 FUYAO GROUP

9.9.1 FUYAO GROUP Details

9.9.2 FUYAO GROUP Major Business

9.9.3 FUYAO GROUP Ultra-Thin Reinforced Glass Product and Services

9.9.4 FUYAO GROUP Ultra-Thin Reinforced Glass Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 FUYAO GROUP Recent Developments/Updates

9.9.6 FUYAO GROUP Competitive Strengths & Weaknesses

9.10 Almaden

9.10.1 Almaden Details

9.10.2 Almaden Major Business

9.10.3 Almaden Ultra-Thin Reinforced Glass Product and Services

9.10.4 Almaden Ultra-Thin Reinforced Glass Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.10.5 Almaden Recent Developments/Updates

- 9.10.6 Almaden Competitive Strengths & Weaknesses
- 9.11 GUANGDONG JIMING GLASS GROUP
 - 9.11.1 GUANGDONG JIMING GLASS GROUP Details
 - 9.11.2 GUANGDONG JIMING GLASS GROUP Major Business
 - 9.11.3 GUANGDONG JIMING GLASS GROUP Ultra-Thin Reinforced Glass Product and Services
 - 9.11.4 GUANGDONG JIMING GLASS GROUP Ultra-Thin Reinforced Glass Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.11.5 GUANGDONG JIMING GLASS GROUP Recent Developments/Updates
 - 9.11.6 GUANGDONG JIMING GLASS GROUP Competitive Strengths & Weaknesses
- 9.12 CSG Holding
 - 9.12.1 CSG Holding Details
 - 9.12.2 CSG Holding Major Business
 - 9.12.3 CSG Holding Ultra-Thin Reinforced Glass Product and Services
 - 9.12.4 CSG Holding Ultra-Thin Reinforced Glass Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.12.5 CSG Holding Recent Developments/Updates
 - 9.12.6 CSG Holding Competitive Strengths & Weaknesses
- 9.13 Jiangsu Weiguang Glass Technology
 - 9.13.1 Jiangsu Weiguang Glass Technology Details
 - 9.13.2 Jiangsu Weiguang Glass Technology Major Business
 - 9.13.3 Jiangsu Weiguang Glass Technology Ultra-Thin Reinforced Glass Product and Services
 - 9.13.4 Jiangsu Weiguang Glass Technology Ultra-Thin Reinforced Glass Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.13.5 Jiangsu Weiguang Glass Technology Recent Developments/Updates
 - 9.13.6 Jiangsu Weiguang Glass Technology Competitive Strengths & Weaknesses
- 9.14 CAIHONG GROUP
 - 9.14.1 CAIHONG GROUP Details
 - 9.14.2 CAIHONG GROUP Major Business
 - 9.14.3 CAIHONG GROUP Ultra-Thin Reinforced Glass Product and Services
 - 9.14.4 CAIHONG GROUP Ultra-Thin Reinforced Glass Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 CAIHONG GROUP Recent Developments/Updates
 - 9.14.6 CAIHONG GROUP Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Ultra-Thin Reinforced Glass Industry Chain

- 10.2 Ultra-Thin Reinforced Glass Upstream Analysis
 - 10.2.1 Ultra-Thin Reinforced Glass Core Raw Materials
 - 10.2.2 Main Manufacturers of Ultra-Thin Reinforced Glass Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 Ultra-Thin Reinforced Glass Production Mode
- 10.6 Ultra-Thin Reinforced Glass Procurement Model
- 10.7 Ultra-Thin Reinforced Glass Industry Sales Model and Sales Channels
 - 10.7.1 Ultra-Thin Reinforced Glass Sales Model
 - 10.7.2 Ultra-Thin Reinforced Glass Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

- 12.1 Methodology
- 12.2 Research Process and Data Source
- 12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Single-Use Bioprocess Tubing Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Single-Use Bioprocess Tubing Production Value by Region (2021-2026) & (USD Million)

Table 3. World Single-Use Bioprocess Tubing Production Value by Region (2027-2032) & (USD Million)

Table 4. World Single-Use Bioprocess Tubing Production Value Market Share by Region (2021-2026)

Table 5. World Single-Use Bioprocess Tubing Production Value Market Share by Region (2027-2032)

Table 6. World Single-Use Bioprocess Tubing Production by Region (2021-2026) & (Meters)

Table 7. World Single-Use Bioprocess Tubing Production by Region (2027-2032) & (Meters)

Table 8. World Single-Use Bioprocess Tubing Production Market Share by Region (2021-2026)

Table 9. World Single-Use Bioprocess Tubing Production Market Share by Region (2027-2032)

Table 10. World Single-Use Bioprocess Tubing Average Price by Region (2021-2026) & (US\$/Meters)

Table 11. World Single-Use Bioprocess Tubing Average Price by Region (2027-2032) & (US\$/Meters)

Table 12. Single-Use Bioprocess Tubing Major Market Trends

Table 13. World Single-Use Bioprocess Tubing Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Meters)

Table 14. World Single-Use Bioprocess Tubing Consumption by Region (2021-2026) & (Meters)

Table 15. World Single-Use Bioprocess Tubing Consumption Forecast by Region (2027-2032) & (Meters)

Table 16. World Single-Use Bioprocess Tubing Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Single-Use Bioprocess Tubing Producers in 2025

Table 18. World Single-Use Bioprocess Tubing Production by Manufacturer (2021-2026) & (Meters)

Table 19. Production Market Share of Key Single-Use Bioprocess Tubing Producers in 2025

Table 20. World Single-Use Bioprocess Tubing Average Price by Manufacturer (2021-2026) & (US\$/Meters)

Table 21. Global Single-Use Bioprocess Tubing Company Evaluation Quadrant

Table 22. World Single-Use Bioprocess Tubing Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Single-Use Bioprocess Tubing Production Site of Key Manufacturer

Table 24. Single-Use Bioprocess Tubing Market: Company Product Type Footprint

Table 25. Single-Use Bioprocess Tubing Market: Company Product Application Footprint

Table 26. Single-Use Bioprocess Tubing Competitive Factors

Table 27. Single-Use Bioprocess Tubing New Entrant and Capacity Expansion Plans

Table 28. Single-Use Bioprocess Tubing Mergers & Acquisitions Activity

Table 29. United States VS China Single-Use Bioprocess Tubing Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Single-Use Bioprocess Tubing Production Comparison, (2021 & 2025 & 2032) & (Meters)

Table 31. United States VS China Single-Use Bioprocess Tubing Consumption Comparison, (2021 & 2025 & 2032) & (Meters)

Table 32. United States Based Single-Use Bioprocess Tubing Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Single-Use Bioprocess Tubing Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Single-Use Bioprocess Tubing Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Single-Use Bioprocess Tubing Production (2021-2026) & (Meters)

Table 36. United States Based Manufacturers Single-Use Bioprocess Tubing Production Market Share (2021-2026)

Table 37. China Based Single-Use Bioprocess Tubing Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Single-Use Bioprocess Tubing Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Single-Use Bioprocess Tubing Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Single-Use Bioprocess Tubing Production, (2021-2026) & (Meters)

Table 41. China Based Manufacturers Single-Use Bioprocess Tubing Production Market Share (2021-2026)

Table 42. Rest of World Based Single-Use Bioprocess Tubing Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Single-Use Bioprocess Tubing Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Single-Use Bioprocess Tubing Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Single-Use Bioprocess Tubing Production, (2021-2026) & (Meters)

Table 46. Rest of World Based Manufacturers Single-Use Bioprocess Tubing Production Market Share (2021-2026)

Table 47. World Single-Use Bioprocess Tubing Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Single-Use Bioprocess Tubing Production by Type (2021-2026) & (Meters)

Table 49. World Single-Use Bioprocess Tubing Production by Type (2027-2032) & (Meters)

Table 50. World Single-Use Bioprocess Tubing Production Value by Type (2021-2026) & (USD Million)

Table 51. World Single-Use Bioprocess Tubing Production Value by Type (2027-2032) & (USD Million)

Table 52. World Single-Use Bioprocess Tubing Average Price by Type (2021-2026) & (US\$/Meters)

Table 53. World Single-Use Bioprocess Tubing Average Price by Type (2027-2032) & (US\$/Meters)

Table 54. World Single-Use Bioprocess Tubing Production Value by Sterilization Method, (USD Million), 2021 & 2025 & 2032

Table 55. World Single-Use Bioprocess Tubing Production by Sterilization Method (2021-2026) & (Meters)

Table 56. World Single-Use Bioprocess Tubing Production by Sterilization Method (2027-2032) & (Meters)

Table 57. World Single-Use Bioprocess Tubing Production Value by Sterilization Method (2021-2026) & (USD Million)

Table 58. World Single-Use Bioprocess Tubing Production Value by Sterilization Method (2027-2032) & (USD Million)

Table 59. World Single-Use Bioprocess Tubing Average Price by Sterilization Method (2021-2026) & (US\$/Meters)

Table 60. World Single-Use Bioprocess Tubing Average Price by Sterilization Method

(2027-2032) & (US\$/Meters)

Table 61. World Single-Use Bioprocess Tubing Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 62. World Single-Use Bioprocess Tubing Production by Application (2021-2026) & (Meters)

Table 63. World Single-Use Bioprocess Tubing Production by Application (2027-2032) & (Meters)

Table 64. World Single-Use Bioprocess Tubing Production Value by Application (2021-2026) & (USD Million)

Table 65. World Single-Use Bioprocess Tubing Production Value by Application (2027-2032) & (USD Million)

Table 66. World Single-Use Bioprocess Tubing Average Price by Application (2021-2026) & (US\$/Meters)

Table 67. World Single-Use Bioprocess Tubing Average Price by Application (2027-2032) & (US\$/Meters)

Table 68. Saint-Gobain Basic Information, Manufacturing Base and Competitors

Table 69. Saint-Gobain Major Business

Table 70. Saint-Gobain Single-Use Bioprocess Tubing Product and Services

Table 71. Saint-Gobain Single-Use Bioprocess Tubing Production (Meters), Price (US\$/Meters), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 72. Saint-Gobain Recent Developments/Updates

Table 73. Saint-Gobain Competitive Strengths & Weaknesses

Table 74. Merck Millipore Basic Information, Manufacturing Base and Competitors

Table 75. Merck Millipore Major Business

Table 76. Merck Millipore Single-Use Bioprocess Tubing Product and Services

Table 77. Merck Millipore Single-Use Bioprocess Tubing Production (Meters), Price (US\$/Meters), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 78. Merck Millipore Recent Developments/Updates

Table 79. Merck Millipore Competitive Strengths & Weaknesses

Table 80. Sartorius Basic Information, Manufacturing Base and Competitors

Table 81. Sartorius Major Business

Table 82. Sartorius Single-Use Bioprocess Tubing Product and Services

Table 83. Sartorius Single-Use Bioprocess Tubing Production (Meters), Price (US\$/Meters), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 84. Sartorius Recent Developments/Updates

Table 85. Sartorius Competitive Strengths & Weaknesses

Table 86. Thermo Fisher Scientific Basic Information, Manufacturing Base and Competitors

Table 87. Thermo Fisher Scientific Major Business

Table 88. Thermo Fisher Scientific Single-Use Bioprocess Tubing Product and Services

Table 89. Thermo Fisher Scientific Single-Use Bioprocess Tubing Production (Meters), Price (US\$/Meters), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 90. Thermo Fisher Scientific Recent Developments/Updates

Table 91. Thermo Fisher Scientific Competitive Strengths & Weaknesses

Table 92. Danaher (Cytiva) Basic Information, Manufacturing Base and Competitors

Table 93. Danaher (Cytiva) Major Business

Table 94. Danaher (Cytiva) Single-Use Bioprocess Tubing Product and Services

Table 95. Danaher (Cytiva) Single-Use Bioprocess Tubing Production (Meters), Price (US\$/Meters), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 96. Danaher (Cytiva) Recent Developments/Updates

Table 97. Danaher (Cytiva) Competitive Strengths & Weaknesses

Table 98. Pall Basic Information, Manufacturing Base and Competitors

Table 99. Pall Major Business

Table 100. Pall Single-Use Bioprocess Tubing Product and Services

Table 101. Pall Single-Use Bioprocess Tubing Production (Meters), Price (US\$/Meters), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 102. Pall Recent Developments/Updates

Table 103. Pall Competitive Strengths & Weaknesses

Table 104. Repligen Basic Information, Manufacturing Base and Competitors

Table 105. Repligen Major Business

Table 106. Repligen Single-Use Bioprocess Tubing Product and Services

Table 107. Repligen Single-Use Bioprocess Tubing Production (Meters), Price (US\$/Meters), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 108. Repligen Recent Developments/Updates

Table 109. Repligen Competitive Strengths & Weaknesses

Table 110. Avantor Basic Information, Manufacturing Base and Competitors

Table 111. Avantor Major Business

Table 112. Avantor Single-Use Bioprocess Tubing Product and Services

Table 113. Avantor Single-Use Bioprocess Tubing Production (Meters), Price (US\$/Meters), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 114. Avantor Recent Developments/Updates

- Table 115. Avantor Competitive Strengths & Weaknesses
- Table 116. Entegris Basic Information, Manufacturing Base and Competitors
- Table 117. Entegris Major Business
- Table 118. Entegris Single-Use Bioprocess Tubing Product and Services
- Table 119. Entegris Single-Use Bioprocess Tubing Production (Meters), Price (US\$/Meters), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 120. Entegris Recent Developments/Updates
- Table 121. Entegris Competitive Strengths & Weaknesses
- Table 122. Watson-Marlow Basic Information, Manufacturing Base and Competitors
- Table 123. Watson-Marlow Major Business
- Table 124. Watson-Marlow Single-Use Bioprocess Tubing Product and Services
- Table 125. Watson-Marlow Single-Use Bioprocess Tubing Production (Meters), Price (US\$/Meters), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 126. Watson-Marlow Recent Developments/Updates
- Table 127. Watson-Marlow Competitive Strengths & Weaknesses
- Table 128. Corning Basic Information, Manufacturing Base and Competitors
- Table 129. Corning Major Business
- Table 130. Corning Single-Use Bioprocess Tubing Product and Services
- Table 131. Corning Single-Use Bioprocess Tubing Production (Meters), Price (US\$/Meters), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 132. Corning Recent Developments/Updates
- Table 133. Corning Competitive Strengths & Weaknesses
- Table 134. Freudenberg Medical Basic Information, Manufacturing Base and Competitors
- Table 135. Freudenberg Medical Major Business
- Table 136. Freudenberg Medical Single-Use Bioprocess Tubing Product and Services
- Table 137. Freudenberg Medical Single-Use Bioprocess Tubing Production (Meters), Price (US\$/Meters), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 138. Freudenberg Medical Recent Developments/Updates
- Table 139. Freudenberg Medical Competitive Strengths & Weaknesses
- Table 140. DuPont Basic Information, Manufacturing Base and Competitors
- Table 141. DuPont Major Business
- Table 142. DuPont Single-Use Bioprocess Tubing Product and Services
- Table 143. DuPont Single-Use Bioprocess Tubing Production (Meters), Price (US\$/Meters), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 144. DuPont Recent Developments/Updates

Table 145. DuPont Competitive Strengths & Weaknesses

Table 146. Trelleborg Medical Solutions Basic Information, Manufacturing Base and Competitors

Table 147. Trelleborg Medical Solutions Major Business

Table 148. Trelleborg Medical Solutions Single-Use Bioprocess Tubing Product and Services

Table 149. Trelleborg Medical Solutions Single-Use Bioprocess Tubing Production (Meters), Price (US\$/Meters), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 150. Trelleborg Medical Solutions Recent Developments/Updates

Table 151. Trelleborg Medical Solutions Competitive Strengths & Weaknesses

Table 152. Global Key Players of Single-Use Bioprocess Tubing Upstream (Raw Materials)

Table 153. Global Single-Use Bioprocess Tubing Typical Customers

Table 154. Single-Use Bioprocess Tubing Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Single-Use Bioprocess Tubing Picture

Figure 2. World Single-Use Bioprocess Tubing Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Single-Use Bioprocess Tubing Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Single-Use Bioprocess Tubing Production (2021-2032) & (Meters)

Figure 5. World Single-Use Bioprocess Tubing Average Price (2021-2032) & (US\$/Meters)

Figure 6. World Single-Use Bioprocess Tubing Production Value Market Share by Region (2021-2032)

Figure 7. World Single-Use Bioprocess Tubing Production Market Share by Region (2021-2032)

Figure 8. North America Single-Use Bioprocess Tubing Production (2021-2032) & (Meters)

Figure 9. Europe Single-Use Bioprocess Tubing Production (2021-2032) & (Meters)

Figure 10. China Single-Use Bioprocess Tubing Production (2021-2032) & (Meters)

Figure 11. Japan Single-Use Bioprocess Tubing Production (2021-2032) & (Meters)

Figure 12. Single-Use Bioprocess Tubing Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Single-Use Bioprocess Tubing Consumption (2021-2032) & (Meters)

Figure 15. World Single-Use Bioprocess Tubing Consumption Market Share by Region (2021-2032)

Figure 16. United States Single-Use Bioprocess Tubing Consumption (2021-2032) & (Meters)

Figure 17. China Single-Use Bioprocess Tubing Consumption (2021-2032) & (Meters)

Figure 18. Europe Single-Use Bioprocess Tubing Consumption (2021-2032) & (Meters)

Figure 19. Japan Single-Use Bioprocess Tubing Consumption (2021-2032) & (Meters)

Figure 20. South Korea Single-Use Bioprocess Tubing Consumption (2021-2032) & (Meters)

Figure 21. ASEAN Single-Use Bioprocess Tubing Consumption (2021-2032) & (Meters)

Figure 22. India Single-Use Bioprocess Tubing Consumption (2021-2032) & (Meters)

Figure 23. Producer Shipments of Single-Use Bioprocess Tubing by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Single-Use Bioprocess Tubing Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Single-Use Bioprocess Tubing Markets in 2025

Figure 26. United States VS China: Single-Use Bioprocess Tubing Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Single-Use Bioprocess Tubing Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Single-Use Bioprocess Tubing Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Single-Use Bioprocess Tubing Production Market Share 2025

Figure 30. China Based Manufacturers Single-Use Bioprocess Tubing Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Single-Use Bioprocess Tubing Production Market Share 2025

Figure 32. World Single-Use Bioprocess Tubing Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Single-Use Bioprocess Tubing Production Value Market Share by Type in 2025

Figure 34. Silicone Tubing

Figure 35. TPE Tubing

Figure 36. PVC Tubing

Figure 37. PE Tubing

Figure 38. Others

Figure 39. World Single-Use Bioprocess Tubing Production Market Share by Type (2021-2032)

Figure 40. World Single-Use Bioprocess Tubing Production Value Market Share by Type (2021-2032)

Figure 41. World Single-Use Bioprocess Tubing Average Price by Type (2021-2032) & (US\$/Meters)

Figure 42. World Single-Use Bioprocess Tubing Production Value by Sterilization Method, (USD Million), 2021 & 2025 & 2032

Figure 43. World Single-Use Bioprocess Tubing Production Value Market Share by Sterilization Method in 2025

Figure 44. Gamma-Sterilized Tubing

Figure 45. Autoclavable Tubing

Figure 46. World Single-Use Bioprocess Tubing Production Market Share by Sterilization Method (2021-2032)

Figure 47. World Single-Use Bioprocess Tubing Production Value Market Share by Sterilization Method (2021-2032)

Figure 48. World Single-Use Bioprocess Tubing Average Price by Sterilization Method (2021-2032) & (US\$/Meters)

Figure 49. World Single-Use Bioprocess Tubing Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 50. World Single-Use Bioprocess Tubing Production Value Market Share by Application in 2025

Figure 51. Biopharmaceutical Companies

Figure 52. Vaccine Manufacturing Organizations

Figure 53. Cell and Gene Therapy Companies

Figure 54. CDMO / CMO Institutions

Figure 55. Research Institutes and Laboratories

Figure 56. World Single-Use Bioprocess Tubing Production Market Share by Application (2021-2032)

Figure 57. World Single-Use Bioprocess Tubing Production Value Market Share by Application (2021-2032)

Figure 58. World Single-Use Bioprocess Tubing Average Price by Application (2021-2032) & (US\$/Meters)

Figure 59. Single-Use Bioprocess Tubing Industry Chain

Figure 60. Single-Use Bioprocess Tubing Procurement Model

Figure 61. Single-Use Bioprocess Tubing Sales Model

Figure 62. Single-Use Bioprocess Tubing Sales Channels, Direct Sales, and Distribution

Figure 63. Methodology

Figure 64. Research Process and Data Source

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