

Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing market size is expected to reach \$ 19866 million by 2032, rising at a market growth of 7.9% CAGR during the forecast period (2026-2032).

Disposable systems and consumables in biomanufacturing refer to a class of pre-sterilized, closed-loop, modular equipment and components used to replace or supplement traditional stainless steel equipment and reusable flow paths in the manufacturing processes of biopharmaceuticals, vaccines, recombinant proteins, antibodies, viral vectors, mRNA, cell and gene therapy, and some synthetic biology. Core products include disposable bioreactors and fermenters and their matching bags; disposable chromatography systems and pre-packed columns/membrane adsorbers/disposable flow paths; disposable filtration systems and depth filters/TFF/viral filters; disposable mixing and dispensing systems and storage bags/mixing bags; disposable material conveying systems and tubing/connectors/manifolds/sterile fittings; as well as sampling bags, disposable sensors, freeze-thaw bags, cell processing kits, disposable pump heads, and other supporting consumables such as automated flow paths. Overall, the industry has evolved from early replacement of basic consumables such as 'bags, tubing, and connectors' to a complete process platform covering upstream culture, downstream separation and purification, pre-treatment of formulations, and closed-loop fluid management.

From a production stage perspective, the role of disposable systems varies at different stages. The laboratory stage is primarily used for small-scale process exploration, cell culture, sample processing, culture medium or buffer storage, filtration validation, and parameter screening, emphasizing flexibility, low contamination risk, and ease of

operation. The pilot-scale stage is mainly used for process scale-up, parameter transfer, and preclinical or early clinical sample production, emphasizing process consistency and scalability with subsequent large-scale production. The large-scale production stage focuses on the use of disposable bioreactors, disposable bags, filtration/TFF, chromatography, mixing and preparation, storage solutions, tubing connections, and closed transfer systems, emphasizing GMP compliance, batch stability, reliable supply chain, complete validation documentation, and cost control.

The characteristics and application scenarios of various products also differ significantly. Disposable bioreactors and fermenters are mainly used for cell culture, seed amplification, antibody and recombinant protein production, vaccine and viral vector production. Their advantages include reduced CIP/SIP, lower risk of cross-contamination, shorter changeover time, and suitability for CDMO and multi-product production. However, their disadvantages lie in the fact that large-scale, high-intensity microbial fermentation, long-term stable large-volume production, and high-stirring/high-mass-transfer scenarios still face technological limitations. Single-use chromatography systems are primarily used for downstream capture and polishing purification, suitable for multi-product, small-batch, high-value, and rapid changeover scenarios. However, trade-offs remain regarding large-scale commercial processing, resin costs, pressure control, and validation complexity. Single-use filtration systems are the most widely used, covering culture medium filtration, clarification, sterilization, virus filtration, TFF concentration, and fluid exchange, serving as a crucial link in downstream bottleneck mitigation and continuous processes. Single-use mixing and dispensing systems are used for culture media, buffers, pre-mixing of formulations, and intermediate liquid management, forming the infrastructure for improving fluid management efficiency in large-scale production. Single-use material handling equipment and consumables are equivalent to a 'closed-loop fluid network' in bioprocessing, enabling the safe transfer of materials between different unit operations through tubing, connectors, sterile fittings, manifolds, and pumps.

From a supplier perspective, the global market exhibits a structure where multinational platform companies, specialized component companies, and regional local suppliers coexist. Representative multinational companies include Danaher/Cytiva, Thermo Fisher Scientific, Sartorius, Merck KGaA, Repligen, Saint-Gobain, Avantor, Entegris, Parker Hannifin, Meissner, and SaniSure, covering single-use bioreactors, filtration, chromatography, fluid management, piping connections, storage bags, and high-purity material components. Equipment and engineering companies such as ABEC, GEA, and Morimatsu are representative in bioreactors, fermentation, mixing, process engineering, and modular facilities. Chinese companies such as Dongfulong, Chutian Technology,

Lepur Bio, Duoning Bio, Jinyishengshi, Jetechn Bio, Hanbang Technology, Saifen Technology, Arios, Bituo Bio, and Boyi Bio are accelerating their efforts to fill gaps in the market, focusing on single-use bags, dispensing systems, filter materials, chromatography media, fluid components, separation and purification consumables, and intelligent manufacturing capabilities.

In the future, the biomanufacturing single-use systems and consumables industry will exhibit five main trends. First, with high penetration of basic consumables, the focus of growth will expand from disposable bioreactors and bags to high-value segments such as downstream filtration, TFF, chromatography, membrane adsorbers, and virus filtration. Second, CDMO, multi-product manufacturing, advanced therapies, and early-stage commercialization projects will continue to drive demand for disposable systems, as these scenarios prioritize rapid changeover, low cross-contamination risk, and flexible capacity. Third, continuous and process-intensified processes will increase requirements for disposable sensors, long-term operating flow paths, ATF/TFF, automated pumps and valves, and PAT systems. Fourth, regulatory and quality requirements will continue to rise, with E&L, material compatibility, sterilization validation, particle control, batch traceability, and supplier change management becoming core aspects of procurement decisions. Fifth, sustainability will become a new dimension of industry competition; in the future, suppliers will need to provide more compelling solutions in areas such as packaging reduction, bio-based or bio-recycling materials, regionalized production, lifecycle assessment, and waste disposal.

The primary characteristic of the global biomanufacturing disposable systems and consumables industry is its evolution from relatively simple basic consumables such as bags, tubing, and filters to a comprehensive portfolio of products covering upstream cultivation, fermentation, solution preparation, storage, transfer, filtration, chromatography, ultrafiltration/washing, sampling, sensing, control, and some downstream purification stages. In the large-scale production stage, disposable bioreactors and fermenters, along with their associated consumables, remain the core components of the market. Bags, culture bags, reaction bags, tubing, connectors, sensors, and fluid management components form the foundation for continuous consumption. This means that market size is not solely driven by the sale of large equipment, but rather by both equipment platforms and high-frequency consumables. For biomanufacturing companies, the procurement logic for disposable systems is no longer simply 'buying a set of equipment,' but rather establishing a verifiable, traceable, and sustainably supplied consumables system centered around complete batch production, process changeover, aseptic transfer, material storage, and batch release.

From a product level perspective, disposable equipment and components can be divided into three categories: The first category is core process equipment, such as disposable bioreactors, disposable mixing and dispensing systems, disposable filtration systems, disposable chromatography systems, disposable TFF systems, and some disposable cell processing equipment; the second category is high-frequency fluid management consumables, such as reservoir bags, culture bags, tubing, connectors, sterile fittings, manifolds, sampling bags, transfer kits, and pump tubing; the third category is functional enhancement components, such as disposable sensors, disposable control flow paths, membrane adsorbers, pre-loaded columns, disposable pump heads, and automated valve assemblies. The industry is moving from the first stage of 'bags replacing tanks' to the second stage of 'components supporting processes,' and is further advancing to the third stage of 'platform supporting infrastructure.' This shift determines that future competition will focus not only on the price of individual consumables, but also on product portfolio completeness, system compatibility, validation documentation packages, material stability, and supplier continuous delivery capabilities.

From a supplier distribution perspective, the global disposable systems and consumables industry exhibits a clear stratification. The first tier consists of multinational platform suppliers, typically covering multiple stages including bioreactoring, mixing and preparation, filtration, chromatography, storage solutions, fluid management, disposable sensing, and process control. These companies possess a global customer base, GMP documentation systems, material databases, validation support capabilities, and cross-regional delivery capabilities. Their advantage lies not only in the variety of their products but also in their ability to participate in the entire lifecycle of their clients, from process development and technology transfer to commercial production, providing replicable platform solutions. The second tier comprises specialized component suppliers, focusing on key components such as membranes, filters, connectors, tubing, pumps, sensors, cell retention devices, bag membrane materials, or high-purity fluid components. While their product range is narrower, their technological depth is high, often determining the reliability, aseptic integrity, long-term operational stability, and material compatibility of the entire disposable system. The third tier consists of regional and local suppliers, primarily relying on localized delivery, cost advantages, engineering response, and customized services to enter the market. They have strong growth potential in China, India, and other rapidly expanding biomanufacturing regions.

This tiered structure is highly relevant to the needs of the large-scale production stage. Large-scale production customers have far higher requirements for single-use systems than laboratory-scale customers. They need stable batch supply, material change

notifications, E&L documentation, sterilization validation, packaging integrity, traceability systems, quality agreements, and supply assurance. Therefore, multinational platform companies still have an advantage in high-end commercial production scenarios; however, with regionalized manufacturing, the expansion of local CDMOs, and increasing cost-reduction pressures on customers, domestic companies have significantly increased opportunities in areas such as bags, mixing solutions, filtration systems, basic fluid components, and some equipment integration. Especially in the Chinese market, domestic suppliers are gradually extending from single consumables to system integration, large-scale equipment, and validation services.

The willingness to use single-use systems in biomanufacturing is already high, especially in areas such as single-use bags, tubing, connectors, storage bags, culture bags, and basic filtration components, which have become essential components of most large-scale production facilities. Single-use bioreactors have also moved from the early rapid introduction phase to a mature and widespread adoption phase, and are widely used in multi-product manufacturing, late-stage clinical projects, CDMO flexible capacity, and some commercial production scenarios. However, this does not mean that the entire industry has entered a period of stagnation. Conversely, with the high penetration of basic components, the market growth logic is shifting from 'first-time adoption' to 'higher frequency consumption, larger-scale upgrades, stronger reliability, more complex process integration, and downstream expansion.' This is also the most noteworthy structural change in the industry today.

From a usage scenario perspective, upstream single-use systems generally have higher acceptance than downstream complex purification systems because the advantages of single-use systems—reduced cleaning, shorter changeover times, and lower contamination risks—are more readily apparent in cell culture, storage, mixing, dispensing, and fluid transfer stages. Downstream stages, constrained by pressure, flow rate, binding capacity, recovery rate, membrane area, chromatography media costs, and the complexity of process validation, have a relatively slower penetration rate. However, with the development of membrane adsorbers, single-use TFFs, pre-packed columns, multi-column chromatography, continuous chromatography, and closed-loop downstream platforms, downstream single-use technologies are becoming an important growth driver in the next stage. Customer usage intentions are also showing more rational characteristics: single-use systems have clear advantages in small-batch, multi-product, high-value, rapid changeover, and contamination risk-sensitive scenarios; while stainless steel systems still offer advantages in unit cost and long-term operation in ultra-large-scale, long-term stable, and high-volume products.

The development of the single-use systems industry is also characterized by continuously increasing quality and regulatory requirements. In the stage of large-scale production, single-use equipment and components directly contact culture media, cells, proteins, antibodies, viral vectors, or intermediate products. Their quality risks stem not only from equipment performance but also from material compatibility, extractables/leaches, particle size, sterilization, packaging integrity, supplier changes, batch traceability, and the integrity of connections during use. As regulatory agencies raise requirements for biopharmaceutical manufacturing processes, contamination control strategies, data integrity, and supplier management, customers are increasingly prioritizing supplier documentation packages, quality systems, and change control when procuring single-use systems, rather than simply comparing prices. For suppliers, the ability to provide complete material information, sterilization validation, E&L support, batch records, and compliance statements has become a basic threshold for entering the large-scale production supply chain.

Cost and sustainability constitute another set of key characteristics. Single-use systems offer comprehensive benefits by reducing cleaning, CIP/SIP, utilities, changeover time, and the risk of cross-contamination; however, their frequent consumption also increases the pressure on consumable procurement. As the market transitions from the introduction phase to maturity, customers are less tolerant of high prices and are paying more attention to per-batch costs, inventory costs, supplier bargaining power, and substitutability. Simultaneously, the challenges of plastic waste, incineration, landfill, and recycling are subjecting single-use systems to greater environmental scrutiny. The industry is shifting from simply emphasizing 'reducing water and cleaning chemicals' to adopting lifecycle assessments, packaging reduction, material optimization, regionalized supply, and recycling solutions.

The downstream customer structure is reshaping the demand logic of the single-use systems and consumables industry. Traditional large pharmaceutical companies focus on commercial supply stability, quality compliance, and long-term costs; emerging biotechnology companies focus on rapid clinical entry, reduced capital investment, and outsourced manufacturing accessibility; CDMOs focus on multi-customer project switchover, capacity utilization, rapid technology transfer, and flexible capacity expansion; cell and gene therapy, mRNA, viral vector, and personalized medicine companies emphasize closed-loop systems, small batches, multiple batches, low contamination risk, and rapid manufacturing. What these different customers have in common is that they no longer view single-use systems merely as tools to save on cleaning costs, but rather as crucial infrastructure for improving manufacturing flexibility, shortening project cycles, reducing batch switchover risks, and supporting multi-product

facility operations.

CDMOs are the most representative demand drivers. CDMO operations inherently involve multiple clients, projects, processes, and batch sizes, requiring production lines to switch rapidly between different molecules, processes, and development stages. Relying on traditional fixed stainless steel systems significantly increases operational complexity due to challenges in cleaning validation, cross-contamination control, production line scheduling, and process changeovers. Disposable systems help CDMOs shorten turnaround times, improve facility utilization, and better handle late-stage clinical, early-stage commercialization, and projects with uncertain demand. Advanced therapies further amplify this logic, as these products typically have smaller batch sizes, higher value, and more personalized processes, demanding even higher standards for closed systems and aseptic transfer.

This report studies the global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing, 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 Systems and Consumables for Large-Scale Production in Biomanufacturing that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing total market, 2021-2032, (USD Million)

Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing total market, key domestic companies, and share, (USD Million)

Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing revenue by player, revenue and market share 2021-2026, (USD Million)

Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing total market by Type, CAGR, 2021-2032, (USD Million)

Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Danaher, Sartorius AG, Merck KGaA, Thermo Fisher Scientific Inc, Saint-Gobain, Cobetter, Duoning Biotech, Avantor, Meissner, SaniSure, 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 Systems and Consumables for Large-Scale Production in Biomanufacturing market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, 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 Systems and Consumables for Large-Scale Production in Biomanufacturing Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market, Segmentation by Type:

Single-use Bioreactors and Fermenters and Related Consumables

Single-use Chromatography Systems and Related Consumables

Single-use Filtration Systems and Related Consumables

Single-use Centrifuges and Related Consumables

Single-use Mixing and Dispensing Systems and Related Consumables

Single-use Material Conveying Equipment and Related Consumables

Others

Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market, Segmentation by Product Form:

Disposable System

Related Consumables

Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market, Segmentation by Fermentation Volume:

?2000L

?2000L

Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market, Segmentation by Application:

Biopharmaceuticals

CDMO/CMO

Others

Companies Profiled:

Danaher

Sartorius AG

Merck KGaA

Thermo Fisher Scientific Inc

Saint-Gobain

Cobetter

Duoning Biotech

Avantor

Meissner

SaniSure

Zhejiang JYSS Bio-Engineering

Parker Hannifin

Shanghai Lepure Biotech

NewAge Industries, Inc.

Repligen Corporation

Alfa Laval

ABEC

Levitronix

Entegris

Tofflon

BioLink

Tezalon Biotech

GEA

Austar Group

TruKing Technology

Dover Corp.?CPC Biotech?

Morimatsu Industry

Lisure

Jiangsu Hanbon

Guangzhou JET Bio-filtration

TECNIC

Chanse Technology

Key Questions Answered

1. How big is the global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing market?
2. What is the demand of the global Single-use Systems and Consumables for Large-

Scale Production in Biomanufacturing market?

3. What is the year over year growth of the global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing market?

4. What is the total value of the global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing market?

5. Who are the Major Players in the global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing market?

6. What are the growth factors driving the market demand?

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