

Single-use Bioprocess Tubing And Assemblies Market Size, Share & Trends Analysis Report By Product (Standalone Bioprocess Tubing, Tubing Assemblies), By Application (Fluid Transfer, Cell Culture & Mixing), By Solution, By End Use, By Region, And Segment Forecasts, 2026 - 2033

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Abstracts

Single-use Bioprocess Tubing And Assemblies Market Summary

The global single-use bioprocess tubing and assemblies market size was valued at USD 3.9 billion in 2025 and is expected to grow from USD 4.5 billion in 2026 to USD 12.5 billion by 2033, growing at a CAGR of 15.7% from 2026 to 2033. North America dominated the market, accounting for 46.1% revenue share in 2025. This growth is driven by the expansion of continuous and integrated bioprocessing workflows, increasing biopharmaceutical R&D, and the expansion of vaccine and rapid response biomanufacturing capacity.

Market Dynamics

Driver: Expansion of continuous and integrated bioprocessing workflows

The expansion of continuous and integrated bioprocessing workflows is emerging as a strong structural driver for the Single-use Bioprocess Tubing & Assemblies Market, primarily due to the need for closed, flexible, and contamination-controlled fluid handling across interconnected unit operations. Continuous bioprocessing shifts production away from discrete batch steps toward uninterrupted material flow, where upstream (perfusion or intensified cell culture) and downstream purification units operate in a synchronized

manner. This architecture significantly increases dependence on sterile, modular, and rapidly configurable tubing assemblies that can maintain product integrity while enabling real-time connectivity between process steps. For instance, in April 2026, in the U.S., Avantor, Inc. expanded its Masterflex portfolio by integrating single-use assemblies and fluid handling systems, strengthening demand for scalable single-use bioprocess tubing and assemblies in biopharmaceutical manufacturing workflows.

Global Single-use Bioprocess Tubing And Assemblies Market Report Segmentation

This report forecasts revenue growth and analyzes the latest trends in each of the sub-segments from 2021 to 2033. Grand View Research has segmented the global market by product, application, solution, end-use, and region for this purpose:

Product Outlook (Revenue, USD Million, 2021 - 2033)

Standalone Bioprocess Tubing

- Silicone Tubing

- Thermoplastic Elastomer (TPE) Tubing

- Fluoropolymer-based Tubing

- Other Thermoplastic Tubing

Tubing Assemblies

- Standard Tubing Assemblies

- Customized Tubing Assemblies

- Connector-integrated Tubing Assemblies

- Sampling & Transfer Tubing Sets

Fluid Transfer Assemblies

Other Tubing-centric Assemblies

Application Outlook (Revenue, USD Million, 2021 - 2033)

Fluid Transfer

Cell Culture & Mixing

Sampling

Fill-finish Applications

Storage & Media Handling

Solution Outlook (Revenue, USD Million, 2021 - 2033)

Customized Solutions

Standard Solutions

End Use Outlook (Revenue, USD Million, 2021 - 2033)

Biopharmaceutical & Pharmaceutical Companies

CROs & CMOs

Cell & Gene Therapy Developers

Academic & Research Institutes

Regional Outlook (Revenue, USD Million, 2021 - 2033)

North America

U.S.

Canada

Mexico

Europe

Germany

UK

France

Italy

Spain

Denmark

Sweden

Norway

Asia Pacific

China

India

Japan

South Korea

Australia

Thailand

Latin America

Brazil

Argentina

Middle East and Africa (MEA)

South Africa

Saudi Arabia

UAE

Kuwait

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