

Upstream Bioprocessing Market Size, Share & Trends Analysis Report By Product (Bioreactors, Cell Culture), By Workflow, By Use Type, By Mode (In House, Outsourced), And Segment Forecasts, 2019 - 2026

<https://marketpublishers.com/r/UCD30D2EB870EN.html>

Date: September 2019

Pages: 145

Price: US\$ 5,950.00 (Single User License)

ID: UCD30D2EB870EN

Abstracts

This report can be delivered to the clients within 48 Business Hours

The global upstream bioprocessing market size is expected to reach USD 12.60 billion by 2026, expanding at a CAGR of 12.90% during the forecast period, according to a new report by Grand View Research, Inc. Commercial success and wide acceptance of biopharmaceuticals have provided lucrative growth avenues to several in house as well as contract manufacturing biopharmaceutical companies. Furthermore, a confluence of factors, such as high demand for biosimilars and biologics, launch of improved cost-effective technologies, and growing acceptance of single-use systems have driven the revenue performance of the market.

Start-ups and new market entrants often face budget constraints while establishing new biomanufacturing plants. Thus, these entities expand their biotherapeutics portfolio by outsourcing the production process to contract services, thereby aiding in revenue growth for upstream bioprocessing services.

Continuous upstream bioprocessing has greatly benefited the bioprocessing industry. Rising implementation of methods, such as acoustic wave technology and continuous centrifugation, for clarification of bioreactor cultures tends to minimize the clarification burden. This, in turn, increases the cell-culture densities, consequently resulting in efficient upstream processes.

Ongoing advancements in cell line productivity with respect to protein expression and clone screening are expected to result in the fastest CAGR of cell culture products over the forecast period. Cell culture is considered as the most challenging and crucial step in upstream bioprocessing, and thus demands more attention with respect to technological intricacies, resulting in the largest share in the upstream bioprocessing market.

Factors such as multi-use systems incur one-time investment, are applicable for larger bioprocessing volumes and maintain the pH and oxygen accurately resulting in high usage rate of these systems. However, a paradigm shift from conventional stainless-steel bioreactors to single-use bioreactor systems has attributed to the lucrative growth of the single-use segment.

Key market players are adopting strategic initiatives, such as novel product developments, mutually beneficial partnerships, agreements, and geographical expansion to reinforce their market presence. For instance, in February 2019, Danaher Corporation signed an agreement to acquire the Biopharma business of GE Life Sciences. The acquisition broadened Danaher's market presence with the addition of GE Biopharma's cell culture media, single-use technologies, development instrumentation, and consumables to its existing portfolio.

Further key findings from the report suggest:

High availability of bioreactors and continuous launches of single-use bioreactors by the key market players can be attributed to the remarkable revenue share of the bioreactors segment

Presence of well-established biopharmaceutical manufacturing firms capable of performing in-house bioproduction has led to the maximum revenue share of this segment

Outsourced mode of upstream bioprocessing is anticipated to witness the fastest CAGR over the forecast period, owing to increase in investments and expansion of manufacturing capabilities through the integration of single-use systems in the plants by CMOs

North America dominated the global upstream bioprocessing market as a result of the continuous innovations in biotechnology and rising preferences for biopharmaceuticals in the region. Moreover, the presence of substantial in-

house biopharmaceutical manufacturers coupled with numerous investments in the U.S. biologics market has driven the growth

Asia Pacific is poised to witness the fastest CAGR over the forecast period due to growing awareness about the rapid analytical methods that can be used for in-process control during the upstream workflows

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