

Prepacked Chromatography Columns Market Report by Type (1000 ML), Technique (Hydrophobic Stationary Phase Chromatography, Ion-Exchange Chromatography, Multimodal Chromatography, and Others), Application (Resin Screening, Protein Purification, Sample Preparation, Anion and Cation Exchange, and Others), End-Use (Pharmaceutical and Biotechnology Companies, Research Laboratories, Water and Environmental, Food and Beverages, and Others), and Region 2024-2032

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Abstracts

The global prepacked chromatography columns market size reached US\$ 2.0 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 3.7 Billion by 2032, exhibiting a growth rate (CAGR) of 6.6% during 2024-2032. The growing prevalence of various chronic diseases, the rising demand for biopharmaceuticals for disease management, and increasing utilization of chromatography across various industries are some of the major factors propelling the growth of the market.

Prepacked Chromatography Columns Market Analysis:

Major Market Drivers: The rising demand for biopharmaceuticals and monoclonal, which require high-purity separation techniques represents a major driver of the market. Advancements in chromatography technology are leading to increased efficiency and reduced process times, making prepacked columns more attractive. Regulatory pressures for stringent quality control in

pharmaceuticals and biotechnology further propel the market.

Key Market Trends: The increasing adoption of single-use technologies, which minimize cross-contamination and enhance efficiency represent the key trends in the market. There is also a shift towards automation and process intensification, driven by the need for higher throughput and responsibility. The integration of advanced materials and improved column designs for enhanced separation performance is another notable trend.

Geographical Trends: North America accounted for the largest region in the prepacked chromatography columns market growth. The robust biopharmaceutical industry, significant new investments in research and development (R&D), and strict regulatory requirements for drug purity and quality are driving the market growth across the North American region. The region's advanced healthcare infrastructure and the presence of leading pharmaceutical companies further fuel the market growth.

Competitive Landscape: Some of the major market players in the prepacked chromatography columns industry include Agilent Technologies Inc., Bio-RAD Laboratories Inc., Knauer Wissenschaftliche Geräte GmbH, Merck & Co. Inc., Pall Corporation (Danaher Corporation), Repligen Corporation, Shimadzu Corporation, Thermo Fisher Scientific Inc., Tosoh Corporation, Waters Corporation, among many others.

Challenges and Opportunities: The market faces various challenges including high costs associated with advanced chromatography systems and limited scalability for large-scale manufacturing processes. However, the market also faces several opportunities such as the growing demand for biopharmaceuticals and personalized medicine, which drives innovations in chromatography techniques.

Prepacked Chromatography Columns Market Trends:

Increased Demand for Biopharmaceuticals

The rising prevalence of various chronic diseases including cancer, diabetes, cardiovascular disorders, and autoimmune conditions is driving the growth of the market. This, coupled with the escalating demand for biopharmaceuticals for disease

management is strengthening the growth of the market. According to NIH, the estimated number of incident cases of cancer in India for the year 2022 was found to be 14,61,427 (crude rate:100.4 per 100000). Among the childhood (0-14 yr) cancers, lymphoid leukemia (boys: 29.2% and girls: 24.2%) was the leading site. The incidence of cancer cases is estimated to increase by 12.8% in 2025 as compared to 2020. For instance, IDF Diabetes Atlas (2021) reports that 10.5% of the adult population (20-79 years) has diabetes, with almost half unaware that they are living with the condition. By 2045, IDF projections show that one in eight adults approximately 783 million, will be living with diabetes an increase of 46%. This is influencing the prepacked chromatography columns market statistics significantly.

Significant Technological Advancement in Chromatography

The market is also driven by continuous advancements in chromatography technology. For instance, ongoing innovations in chromatographic techniques including high-performance liquid chromatography (HPLC) and affinity chromatography are improving the efficiency, speed, and resolution of separation. The widespread adoption of chromatography in environmental testing is influencing the growth of the market. For instance, in June 2023, Agilent Technologies Inc. announced two new liquid chromatography-mass spectrometry systems (LCMS), the Agilent 6495D LC/TQ and the Agilent Revident LC/Q-TQF. Facilitating the high-end performance of the Revident LC/Q-TQF, Agilent is also announcing the new Agilent MassHunter Explorer Profiling software and the new Agilent ChemVistra library manager software. This is expected to fuel the prepacked chromatography columns market forecast over the coming years.

Rising Emphasis on Bioprocessing and Single-Use Technologies

The increasing focus of biopharmaceutical and biotechnology industries towards single-use technologies to streamline production and reduce cross-contamination risk is contributing to the growth of the market. Single-use prepackaged columns optimize the use of valuable production time by eliminating the need for cleaning and validation steps between batches which leads to more efficient and cost-effective manufacturing. For instance, in September 2023, Repligen Corporation, a life sciences company focused on bioprocessing technology leadership, announced that it has entered into a definitive agreement to acquire privately held Metenova AB (Metenova) of Molndal, Sweden. Metenova is projected to generate revenues of \$24 million to \$25 million for fiscal year 2023, led by the success of its magnetic mixing and drive train technologies that are widely used by global biopharmaceutical companies and contract development and manufacturing organizations (CDMOs). The company recently entered the single-use

mixing market with the launch of its MixOne platform, leveraging the success of its existing stainless steel (repeat-use) product line.

Prepacked Chromatography Columns Market Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on type, technique, application, and end-use.

Breakup by Type:

1000 ML

>1000 ML accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the type. This includes 1000 ML. According to the report, >1000 ML represented the largest market segment.

The rising preference for large column sizes across different industry verticals is driving the market segment. >1000 ML prepacked columns are commonly employed for the purification of biomolecules such as monoclonal antibodies, proteins, and vaccines. They facilitate high-capacity chromatographic separations, ensuring the production of pure and high-quality biopharmaceutical products. Additionally, food and beverage (F&B) manufacturers utilize >1000 mL prepacked columns for tasks like flavor extraction, quality control, and the separation of components like sugars, amino acids, and colorants. These columns aid in achieving consistent product quality and compliance with food safety regulations. In chemical research and development (R&D), these columns are essential for synthesizing and purifying compounds. Researchers can scale up their chromatographic processes efficiently, saving time and resources while ensuring product purity.

Breakup by Technique:

Hydrophobic Stationary Phase Chromatography

Ion-Exchange Chromatography

Multimodal Chromatography

Others

Ion-exchange chromatography holds the majority of the market share

A detailed breakup and analysis of the market based on the technique has also been provided in the report. This includes hydrophobic stationary phase chromatography, ion-exchange chromatography, multimodal chromatography, and others. According to the report, ion-exchange chromatography accounts for the largest market share.

Ion-exchange chromatography is versatile and can be applied to a wide range of biomolecules, including proteins, nucleic acids, and other charged molecules. This adaptability makes it suitable for various research and industrial applications. Additionally, it offers excellent selectivity based on the charge of the molecules being separated. By using ion-exchange resins with different functional groups, researchers can effectively separate and purify target molecules from complex mixtures. Apart from this, it provides high-resolution separation, enabling the isolation of closely related species with different charge properties. Furthermore, it can be easily scaled up for industrial production, making it suitable for large-scale purification processes in biopharmaceuticals, food processing, and other industries.

Breakup by Application:

Resin Screening

Protein Purification

Sample Preparation

Anion and Cation Exchange

Others

Sample preparation represents the largest market segment

The report has provided a detailed breakup and analysis of the market based on the

application. This includes resin screening, protein purification, sample preparation, anion and cation exchange, and others. According to the report, sample preparation holds the largest market share.

Sample preparation is a fundamental prerequisite for chromatographic analyses which is fueling the segment growth in the market. It involves the extraction, clean-up, and concentration of target molecules from complex samples, ensuring that only relevant compounds reach the chromatography columns. The quality of sample preparation directly influences the accuracy and sensitivity of subsequent chromatographic analyses, making it an essential step. Additionally, diverse industries, including pharmaceuticals, biotechnology, food and beverage, environmental monitoring, and healthcare, heavily rely on chromatography for quality control, research, and product development. Furthermore, ongoing advancements in analytical techniques, such as high-performance liquid chromatography (HPLC) and mass spectrometry (MS), demand sample preparation methods that can cater to evolving needs.

Breakup by End-Use:

Pharmaceutical and Biotechnology Companies

Research Laboratories

Water and Environmental

Food and Beverages

Others

Pharmaceutical and biotechnology companies account for the largest market share

A detailed breakup and analysis of the market based on the end-use has also been provided in the report. This includes pharmaceutical and biotechnology companies, research laboratories, water and environmental, food and beverages, and others. According to the report, pharmaceutical and biotechnology companies represent the largest market segment.

Pharmaceutical and biotechnology companies are subject to rigorous regulatory requirements to ensure the safety and efficacy of their products which is further driving

the segment growth in the market. Chromatography is a trusted and standardized method for characterizing and purifying compounds, making prepacked columns an attractive option for achieving compliance and maintaining consistency in manufacturing. Moreover, the continuous advancements in biopharmaceuticals, including monoclonal antibodies and gene therapies, have led to increased demand for specialized chromatography columns tailored to these complex molecules. Furthermore, these industries rely on precise and efficient separation and purification of biomolecules, such as proteins, antibodies, and nucleic acids, at various stages of drug development, production, and quality control. Prepacked chromatography columns offer ready-to-use solutions that significantly streamline these processes, reducing time and labor costs.

Breakup by Region:

North America

United States

Canada

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

North America leads the market, accounting for the largest prepacked chromatography columns market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America represents the largest regional market for prepacked chromatography columns.

North America is home to numerous pharmaceutical and biotechnology companies engaged in drug discovery, development, and production which is driving the market growth. Additionally, pharmaceutical and biotechnology sectors in North America are subject to strict regulatory standards set by the U.S. Food and Drug Administration (FDA) and Health Canada. Apart from this, several major players in the chromatography

column manufacturing industry are headquartered or have a significant presence in North America. This concentration of key industry players fosters competition, innovation, and a wide range of product offerings. Furthermore, the region boasts advanced healthcare infrastructure, including cutting-edge diagnostic laboratories and healthcare facilities. Chromatography is extensively used in clinical diagnostics and research, further fueling the demand for prepacked columns. For instance, in February 2024, Shimadzu Corporation acquired the catalytic micro-reactive business for gas chromatography (GC) from Activated Research Company, LLC (ARC, Minnesota, USA).

Competitive Landscape:

The market research report has also provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the major market players in the prepacked chromatography columns industry include Agilent Technologies Inc., Bio-RAD Laboratories Inc., Knauer Wissenschaftliche Geräte GmbH, Merck & Co. Inc., Pall Corporation (Danaher Corporation), Repligen Corporation, Shimadzu Corporation, Thermo Fisher Scientific Inc., Tosoh Corporation, Waters Corporation.

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

The competitive landscape of the prepacked chromatography market is featured by the presence of major players including GE Healthcare, Merck KGaA, Bio-Rad Laboratories, and Thermo Fisher Scientific. These companies focus on continuous innovation, mergers and acquisitions, and strategic partnerships to enhance their market position. For instance, in June 2022, Bio-Rad Laboratories, Inc. announced the launch of EconoFit Low-Pressure prepacked Chromatography Column Packs to support resin screening experiments in the development of protein purification workflows.

Prepacked Chromatography Columns Market News:

In August 2023, Water Corporation introduced the first in a new line of size exclusion chromatography columns the game at improving the analysis while lowering the cost of gene therapy, especially adeno associated viral (AAV)

vectors. The new Waters XBridge Premier GTx BEH SEC columns doubles the speed of measuring the potency and safety of AAVs.

In May 2024, Shimadzu Corporation announced the release of Peakintelligence for LC, software incorporating a proprietary liquid chromatography (LC) with algorithms developed using AI technology. The algorithm was developed based on AI learning using LC data from Ajinomoto Co, inc.

In February 2024, Thermo Fisher Scientific launched the Dionex Inuvian Ion Chromatography (IC) system, for ion chromatography analysis. Designed to be reconfigurable, the new technology can be used by scientists working in a variety of industries including food and beverage, municipal water, and more. This technology can also identify corrosive contaminants in oil and gas while providing quality assurance and quality control of ionic compounds in food, beverages, and pharmaceuticals.

Key Questions Answered in This Report:

How has the global prepacked chromatography columns market performed so far, and how will it perform in the coming years?

What are the drivers, restraints, and opportunities in the global prepacked chromatography columns market?

What is the impact of each driver, restraint, and opportunity on the global prepacked chromatography columns market?

What are the key regional markets?

Which countries represent the most attractive prepacked chromatography columns market?

What is the breakup of the market based on the type?

Which is the most attractive type in the prepacked chromatography columns market?

What is the breakup of the market based on the technique?

Which is the most attractive technique in the prepacked chromatography columns market?

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