

3D Cell Culture Global Market – Forecast To 2028

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Abstracts

3D cell culture is an artificial environment that allows biological cells to interact with the environment in a three-dimensional way, similar to cells 'in vivo'. Cells in a 3D cell culture model are subjected to stimuli and environmental conditions similar to those encountered by the cells of a living organism. The close replication of real-world conditions in 3D cell culture models has made them increasingly becoming popular in variety of applications like tissue engineering, drug discovery, toxicity testing, disease modelling, cancer research, stem cell research and others. The development of advanced scaffold based products (ready to use scaffold based plates, organ specific scaffolds etc), scaffold free products (portable bioreactor, organ on chip etc., and emerging high potential bioprinting technologies will further expands the 3D cell culture applications areas.

The 3D Cell culture global market is expected to grow at a mid teen CAGR from 2021 to 2028. The factors such as increasing funding towards the cell based research, increasing focus towards the application 3D cell culture models in in-vitro testing in drug discovery, toxicity testing due to advantages over 2D cell culture system are driving the 3D cell culture market. Whereas, growing focus towards application of 3D cell culture in the personalized and regenerative medicine and advancement is 3D cell culture technologies such as advanced bioreactors (integrated bioreactor and hand handled bioreactor), magnetic bioprinting or levitation, organ specific scaffolds and integration of AI technologies will provide immense growth opportunities for the 3D cell culture market. However, lack of skilled personnel, complications associated with establishment of 3D cell culture, ethical issues associated with 3D cell culture and stringent process control for handling 3D cell culture expected to hamper the market growth.

The market for 3D cell culture is segmented based on technology, products, end-user and geography. Based on the technology, the market is segmented into scaffold based platforms, scaffold free platforms and bioprinting. Among technologies, Scaffold based

platforms is accounted for the highest revenue in 2021 and is expected to grow at a low teen CAGR from 2021 to 2028. Scaffold free platforms is expected to grow at a mid teen CAGR from 2021 to 2028 due to increasing adoption of scaffold free technologies in the development of 3D models such as spheroids and development of advanced scaffold free products such as integrated bioreactor, organ-on chip etc. The scaffold based platforms is further segmented into solid scaffolds, hydrogels and others. Among these, Solid Scaffolds segment is accounted for the highest revenue in 2021 and is expected to grow at a low teen CAGR from 2021 to 2028. Hydrogels is expected to grow at a mid teen CAGR from 2021 due to increasing development of advanced hydrogels. The scaffold free platforms is further segmented into hanging drop method, agitation based method, forced floating and microfluidics. Among these, Forced floating segment is accounted for the highest revenue in 2021 and is expected to grow at a mid teen CAGR from 2021 to 2028. Microfluidics is expected to grow at a high teen CAGR from 2021 to 2028.

Based on the products, the 3D cell culture market is classified into Cells& tissues, Media, Sera and Reagents, Microplates & Others, assay kits, scaffolds and Instruments. Among the products, media, sera and reagents accounted for the highest revenue in 2021 and are expected to grow at a mid teen CAGR from 2021 to 2028 due to an increase in demand for media and reagents in research, and drug discovery applications. Scaffolds segment are expected to grow at a mid teen CAGR from 2021 to 2028 due to development of innovative scaffolds by the companies. Scaffold segment is further sub segmented into natural scaffolds, synthetic scaffolds and hybrid composite. Among these, Natural scaffolds segment is accounted for the highest revenue in 2021 and are expected to grow at a mid teen CAGR from 2021 to 2028. Synthetic Scaffolds segment is expected to grow at a mid teen CAGR from 2021 to 2028.

Based on applications the 3D cell culture market is divided into basic research, toxicity and drug safety screening, tissue engineering, stem cell research, drug discovery, cancer research, and others. Among the applications, cancer research accounted for the highest revenue in 2021 and is expected to grow at a mid teen CAGR from 2021 to 2028. Stem cell research is expected to grow at a mid teen CAGR from 2021 to 2028.

Based on end users, 3D cell culture market is segmented into academic and research institution, biotechnology and pharmaceutical industry, and others. Among these Biotechnology & Pharmaceutical segment is accounted for the highest revenue in 2021 and is expected to grow at a low teen CAGR from 2021 to 2028 due to increasing focus towards the adoption of 3D cell culture in-vitro models in drug discovery and toxicity testing applications and increase in development of new drugs. Other end-users such

as CRO's is expected to grow at a mid teen CAGR from 2021 to 2028 due to increasing focus towards the adoption of 3D cell culture model in drug discovery by the CRO's.

By geography, the 3D cell culture global market is segmented into North America (U.S. and Rest of North America), Europe (Germany, France, U.K. and Rest of Europe), Asia-Pacific (Japan, China, South Korea, and Rest of APAC) and the Rest of the world (Brazil, Rest of Latin America and the Middle East & Africa). North America accounted for the largest revenue in 2021 and is expected to grow at a low teen CAGR from 2021 to 2028. The factors increase in R&D expenditure, increasing government funding towards the cell based research, increasing drug discovery and development research and growing drug development pipelines, increasing interest towards the personalized medicine and regenerative medicine research and development of innovative 3D cell culture products by the companies for the application in research, drug discovery, and tissue engineering drivers the 3D cell culture market in the region.

Europe is expected to grow at a mid teen CAGR from 2021 to 2028. The factors such as increase in biotech R&D expenditure, presence of major biotech parks, entrepreneurship hubs with the ideal condition for biotech companies, venture capital providers, increasing number biotech companies, government funding for biotech innovative start-ups and cancer research stem cell research, growing drug discovery research by increasing investment in pharmaceutical sector to develop New Product Development (NPD) pipeline, development of advanced 3D cell culture products, entering of new companies with innovative 3D cell culture products and increase in private funding for the development of innovative 3D cell culture products are propelling 3D cell culture market in the region.

The 3D cell culture global market is competitive and all the players in this market are involved in adopting advanced technologies in 3D cell culture to expand their product portfolio and maintain their market shares. The key players in the 3D cell culture global market include Thermo Fisher Scientific (U.S.), Corning (U.S.), Lonza (Switzerland), Merck KGaA (Germany), Insphero (Switzerland), Reprocell (Japan), Greiner-Bio (Austria), Mimetas (Netherlands), Aspect Biosystem (Canada), BICO (Sweden) and 3D systems (U.S.).

The report provides an in-depth market analysis of the above-mentioned segments across the following region:

North America
U.S.

Rest of North America

Europe

Germany

U.K.

France

Rest of Europe

Asia-Pacific

China

Japan

South Korea

Rest of APAC

Rest of the World (RoW)

Brazil

Rest of Latin America

Middle East and Others

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FIGURE 16 SCAFFOLDS GLOBAL MARKET SHARE, BASED ON TYPE, (2021 V/S 2028) (%)

FIGURE 17 3D CELL CULTURE GLOBAL MARKET SHARE, BASED ON APPLICATION, (2021 V/S 2028) (%)

FIGURE 18 DRUG DISCOVERY GLOBAL MARKET SHARE, BY REGION, (2021 V/S 2028) (%)

FIGURE 19 3D CELL CULTURE GLOBAL MARKET SHARE, BASED ON END-USERS, (2021 V/S 2028) (%)

FIGURE 20 3D CELL CULTURE GLOBAL MARKET REVENUE, BY REGION (2020-2028) (\$MN), CAGR (%)

FIGURE 21 3D CELL CULTURE GLOBAL MARKET REVENUE, BY GEOGRAPHY (2021) (\$ MN)

FIGURE 22 NORTH AMERICA 3D CELL CULTURE MARKET SHARE, BASED ON TECHNOLOGY (2021 VS 2028) (%)

FIGURE 23 NORTH AMERICA SCAFFOLD BASED PLATFORMS MARKET SHARE, BASED ON TYPE (2021 VS 2028) (%)

FIGURE 24 NORTH AMERICA SCAFFOLD FREE PLATFORMS MARKET SHARE, BASED ON TYPE (2021 VS 2028) (%)

FIGURE 25 NORTH AMERICA 3D CELL CULTURE MARKET SHARE, BY PRODUCTS (2021 VS 2028) (%)

FIGURE 26 NORTH AMERICA SCAFFOLDS MARKET SHARE, BASED ON TYPE (2021 VS 2028) (\$MN)

FIGURE 27 NORTH AMERICA 3D CELL CULTURE MARKET SHARE, BASED ON APPLICATION (2021 VS 2028) (%)

FIGURE 28 NORTH AMERICA 3D CELL CULTURE MARKET SHARE, BASED ON END-USER (2021 VS 2028) (%)

FIGURE 29 NORTH AMERICA 3D CELL CULTURE MARKET SHARE, BASED ON COUNTRY (2021 V/S 2028) (%)

FIGURE 30 U.S. 3D CELL CULTURE MARKET REVENUE, BASED ON TECHNOLOGY & PRODUCTS (2021 VS 2028)(\$MN)

FIGURE 31 U.S. 3D CELL CULTURE MARKET REVENUE, BASED ON APPLICATIONS & END-USER (2021 VS 2028)(\$MN)

FIGURE 32 REST OF NORTH AMERICA 3D CELL CULTURE MARKET REVENUE, BASED ON TECHNOLOGY & PRODUCTS (2021 VS 2028) (\$MN)

FIGURE 33 REST OF NORTH AMERICA 3D CELL CULTURE MARKET REVENUE, BASED ON APPLICATIONS & END-USER (2021 VS 2028) (\$MN)

FIGURE 34 EUROPE 3D CELL CULTURE MARKET SHARE, BASED ON TECHNOLOGY (2021 VS 2028) (%)

FIGURE 35 EUROPE SCAFFOLD BASED PLATFORMS MARKET SHARE, BASED ON TYPE (2021 VS 2028) (%)

FIGURE 36 EUROPE SCAFFOLD FREE PLATFORMS MARKET SHARE, BASED ON TYPE (2021 VS 2028) (%)

FIGURE 37 EUROPE 3D CELL CULTURE MARKET SHARE, BASED ON PRODUCTS (2021 VS 2028) (%)

FIGURE 38 EUROPE SCAFFOLDS MARKET SHARE, BASED ON TYPE (2021 VS 2028) (%)

FIGURE 39 EUROPE 3D CELL CULTURE MARKET SHARE, BASED ON APPLICATION (2021 VS 2028) (%)

FIGURE 40 EUROPE 3D CELL CULTURE MARKET SHARE, BASED ON END-USERS (2021 VS 2028) (%)

FIGURE 41 EUROPE 3D CELL CULTURE MARKET SHARE, BASED ON COUNTRY

(2021 V/S 2028) (%)

FIGURE 42 GERMANY 3D CELL CULTURE MARKET REVENUE, BASED ON TECHNOLOGY & PRODUCTS (2021 VS 2028) (\$MN)

FIGURE 43 GERMANY 3D CELL CULTURE MARKET REVENUE, BASED ON APPLICATIONS & END-USER (2021 VS 2028) (\$MN)

FIGURE 44 U.K. 3D CELL CULTURE MARKET REVENUE, BASED ON TECHNOLOGY & PRODUCTS (2021 VS 2028) (\$MN)

FIGURE 45 U.K. 3D CELL CULTURE MARKET REVENUE, BASED ON APPLICATIONS & END-USER (2021 VS 2028) (\$MN)

FIGURE 46 FRANCE 3D CELL CULTURE MARKET REVENUE, BASED ON TECHNOLOGY & PRODUCTS (2021 VS 2028) (\$MN)

FIGURE 47 FRANCE 3D CELL CULTURE MARKET REVENUE, BASED ON APPLICATIONS & END-USER (2021 VS 2028) (\$MN)

FIGURE 48 REST OF EUROPE 3D CELL CULTURE MARKET REVENUE, BASED ON TECHNOLOGY & PRODUCTS (2021 VS 2028) (\$MN)

FIGURE 49 REST OF EUROPE 3D CELL CULTURE MARKET REVENUE, BASED ON APPLICATIONS & END-USER (2021 VS 2028) (\$MN)

FIGURE 50 APAC 3D CELL CULTURE MARKET SHARE, BASED ON TECHNOLOGY (2021 VS 2028) (%)

FIGURE 51 APAC SCAFFOLD BASED PLATFORMS MARKET SHARE, BASED ON TYPE (2021 VS 2028) (%)

FIGURE 52 APAC SCAFFOLD FREE PLATFORMS MARKET SHARE, BASED ON TYPE (2021 VS 2028) (%)

FIGURE 53 APAC 3D CELL CULTURE MARKET SHARE, BASED ON PRODUCTS (2021 VS 2028) (%)

FIGURE 54 APAC SCAFFOLDS MARKET SHARE, BASED ON TYPE (2021 VS 2028) (%)

FIGURE 55 APAC 3D CELL CULTURE MARKET SHARE, BASED ON APPLICATION (2021 VS 2028) (%)

FIGURE 56 APAC 3D CELL CULTURE MARKET SHARE, BASED ON END-USERS (2021 VS 2028) (\$MN)

FIGURE 57 APAC 3D CELL CULTURE MARKET SHARE, BASED ON COUNTRY (2021 V/S 2028) (%)

FIGURE 58 CHINA 3D CELL CULTURE MARKET REVENUE, BASED ON TECHNOLOGY & PRODUCTS (2021 VS 2028) (\$MN)

FIGURE 59 CHINA 3D CELL CULTURE MARKET REVENUE, BASED ON APPLICATIONS & END-USER (2021 VS 2028) (\$MN)

FIGURE 60 JAPAN 3D CELL CULTURE MARKET REVENUE, BASED ON TECHNOLOGY & PRODUCTS (2021 VS 2028) (\$MN)

FIGURE 61 JAPAN 3D CELL CULTURE MARKET REVENUE, BASED ON APPLICATIONS & END-USER (2021 VS 2028) (\$MN)

FIGURE 62 SOUTH KOREA 3D CELL CULTURE MARKET REVENUE, BASED ON TECHNOLOGY & BY PRODUCTS (2021 VS 2028) (\$MN)

FIGURE 63 SOUTH KOREA 3D CELL CULTURE MARKET REVENUE, BASED ON APPLICATION AND END-USER (2021 VS 2028) (\$MN)

FIGURE 64 REST OF APAC COUNTRIES 3D CELL CULTURE MARKET REVENUE, BASED ON TECHNOLOGY & PRODUCTS, (2021 VS 2028) (\$MN)

FIGURE 65 REST OF APAC 3D CELL CULTURE MARKET REVENUE, BASED ON APPLICATIONS & END-USER (2021 VS 2028) (\$MN)

FIGURE 66 ROW 3D CELL CULTURE MARKET SHARE, BASED ON TECHNOLOGY (2021 VS 2028) (%)

FIGURE 67 ROW SCAFFOLD BASED PLATFORMS MARKET SHARE, BASED ON TYPE (2021 VS 2028) (%)

FIGURE 68 ROW SCAFFOLD FREE BASED PLATFORMS MARKET SHARE, BASED ON TYPE (2021 VS 2028) (%)

FIGURE 69 ROW 3D CELL CULTURE MARKET SHARE, BY PRODUCTS (2021 VS 2028) (%)

FIGURE 70 ROW SCAFFOLDS MARKET SHARE, BY TYPE (2021 VS 2028) (%)

FIGURE 71 ROW 3D CELL CULTURE MARKET SHARE, BASED ON APPLICATION (2021 VS 2028) (%)

FIGURE 72 ROW 3D CELL CULTURE MARKET SHARE, BASED ON END-USER (2021 VS 2028) (%)

FIGURE 73 ROW 3D CELL CULTURE MARKET SHARE, BASED ON COUNTRY (2021 V/S 2028) (%)

FIGURE 74 BRAZIL 3D CELL CULTURE MARKET REVENUE, BASED ON TECHNOLOGY & PRODUCTS (2021 VS 2028) (\$MN)

FIGURE 75 BRAZIL 3D CELL CULTURE MARKET REVENUE, BASED ON APPLICATIONS & ENDUSER (2021 VS 2028) (\$MN)

FIGURE 76 REST OF LATIN AMERICA 3D CELL CULTURE MARKET REVENUE, BASED ON TECHNOLOGY & PRODUCTS (2021 VS 2028) (\$MN)

FIGURE 77 REST OF LATIN AMERICA 3D CELL CULTURE MARKET REVENUE, BASED ON APPLICATIONS & ENDUSER (2021 VS 2028) (\$MN)

FIGURE 78 MIDDLE EAST AND OTHERS 3D CELL CULTURE MARKET REVENUE, BASED ON TECHNOLOGY & PRODUCTS (2021 VS 2028) (\$MN)

FIGURE 79 MIDDLE EAST AND OTHERS 3D CELL CULTURE MARKET REVENUE, BASED ON APPLICATIONS & ENDUSER (2021 VS 2028) (\$MN)

FIGURE 80 KEY GROWTH STRATEGIES, (2020 – 2021)

FIGURE 81 SWOT: 3D SYSTEMS

FIGURE 82 SWOT: ASPECT BIOSYSTEMS

FIGURE 83 SWOT: BICO

FIGURE 84 SWOT: CORNING INCORPORATED

FIGURE 85 SWOT: GREINER AG

FIGURE 86 SWOT: INSPHERO AG

FIGURE 87 SWOT: LONZA GROUP

FIGURE 88 SWOT: MERCK KGAA

FIGURE 89 SWOT: MIMETAS

FIGURE 90 SWOT: REPROCELL INC.

FIGURE 91 SWOT: THERMO FISHER SCIENTIFIC, INC

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