

Life Science Filtration Global Market - Forecast To 2028

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Abstracts

Filtration is a mechanical or physical process that typically removes unwanted materials from fluids (liquids or gases) by passing only the fluid through a media. Filters have been widely used in life science industries (Pharmaceutical & biopharmaceutical, research and medical device). The process is an essential step in drug discovery development, manufacturing and final processing of both small molecules and large molecules. Contaminant removal, controlling the amount of bioburden during the process, preventing environmental (airborne) contaminants and sterilizing filtration of the final product are the application of filters in pharma industries. In biopharma industries, filters are used both in upstream processing such as media preparation, cell culture and harvesting and in downstream processing such as buffer preparation, concentration/diafiltration and sterile filtration. In medical device industry, filtration is used as an essential component of some of the medical procedures such as hemodialysis, plasmapheresis, ventilation, ECMO, infusion etc and also used in sample preparation for diagnostic tests. Apart from these applications, filtration is commonly employed in research for sterile filtration, particle removal and ultracleaning in cell culture purposes, sample preparation and reagents preparation for laboratory experiments. The systems, consumables (filters) and accessories are necessary to perform filtration process. The choice of right filters is important to use in various applications in pharma, biopharma, medical devices and research as it make a huge difference in yields, process economics and product viability.

The life science filtration global market is expected to grow at a double digit CAGR from 2021 to 2028 to reach \$23,684.5 million by 2028. The factors such as growing demand for biologics, increasing investment in research and development (R&D) and expansion of manufacturing facilities, demand for generic pharmaceuticals, rapid growth of medtech industry with increasing disease population, are driving the market, Whereas

increasing utilization single use technologies and advancements in filtration technologies such as development of high capacity membrane filters, changes in pleated geometry, development of advanced pumps and ultrasonic sensor, advancement in membrane technologies and TFF process technologies are providing immense growth opportunities to the market. The high cost of filtration devices, complications associated with filtration and stringent regulations associated with pharma manufacturing and medical device industry are hindering the market growth.

The market for life science filtration is segmented based on products, application, end-user and geography. Based on the products, the market is segmented into filtration systems, consumables and accessories. Among products, filtration consumables segment accounted for the highest revenue in 2021 and is expected to grow at a double digit CAGR from 2021 to 2028. The consumables is further segmented based on filter type and based on filter usage. Based On filter type, the consumables market is segmented into membrane filters and depth filters. Among the filter type, membrane filters segment accounted for the highest revenue in 2021 and is expected to grow at a double digit CAGR from 2021 to 2028. The membrane filters is further segmented based on technology into microfiltration, ultrafiltration and others. Among these, ultrafiltration segment accounted for the highest revenue in 2021 and is expected to grow at a double digit CAGR from 2021 to 2028. Microfiltration is expected to grow at a low teen CAGR from 2021 to 2028. Based on Filter Usage, Consumables are further segmented into reusable filtration and single use filtration. Among these, reusable filtration is accounted for the highest revenue in 2021 and is expected to grow at a high single digit CAGR from 2021 to 2028. Single-Use filtration is expected to grow at a low teen CAGR from 2021 to 2028. The filtration systems global market is further segmented into Direct Flow System (DFF), Tangential Flow System (TFF) and others. Among these, Direct Flow System (DFF) segment accounted for the highest revenue in 2021 and is expected to grow at a high single digit CAGR from 2021 to 2028. Tangential Flow System (TFF) is expected to grow at a double digit CAGR from 2021 to 2028.

Based on applications the life science filtration global market is divided into drug discovery, development and manufacturing, final processing, medical device and others. Among the applications, drug discovery, development and manufacturing, accounted for the highest revenue in 2021 and is expected to grow at a mid teen CAGR from 2021 to 2028. Drug discovery, development and manufacturing segment is further segmented based on molecule into small molecule filtration and large molecule filtration. Among these, large molecule filtration segment is accounted for the highest revenue in 2021 and is expected to grow at a mid teen CAGR from 2021 to 2028.

Based on end users, life science filtration market is segmented into Pharma, Biotech and CMO's, Hospitals, Diagnostic labs & Dialysis Centers and Others. Among these, Pharma, Biotech and CMO's segment is accounted for the highest revenue in 2021 and is expected to grow at a low teen CAGR from 2021 to 2028.

By geography, the life science filtration global market is segmented into North America (U.S. and Rest of North America), Europe (Germany, France, Italy and Rest of Europe), Asia-Pacific (Japan, China, India, 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 double digit CAGR from 2021 to 2028. The factors such as increasing health care expenditure, growing pharma R&D expenditure, increasing development of new drugs over the time, growing biopharmaceutical drugs pipelines, presence of number of API manufacturing facilities for all regulated drug products, government support to expand the domestic pharmaceutical manufacturing facilities increasing generics drug approvals, growing medical device industry, rising chronic kidney disease population with increasing dialysis procedures, and adoption of advanced single use technologies by the filtration companies are driving the life science filtration market in the region.

Asia-Pacific is expected to grow at a double digit CAGR from 2021 to 2028 to reach \$XX million by 2028. The factors such as increasing generic pharmaceuticals and vaccines production, number of pharma companies with a strong network of manufacturing facilities, increasing outsourcing with number of CMO's and expanding manufacturing facilities, increasing development of new pharma and biopharma drugs, growing biotech R&D investment, presence of number of innovative biotech startups, presence of dedicated departments to support biotechnology research, increasing government investment to support the pharma and biotech industry, increasing end-stage kidney disease population with demand for dialysis procedures and raising investment by the filtration company to expand their capabilities are driving the life science filtration market in the region.

The life science filtration global market is competitive and all the players in this market are involved in adopting advanced technologies in life science filtration to expand their product portfolio and maintain their market shares.

The key players in the life science filtration global market include 3M Company (U.S.), Asahi Kasei Corporation (Japan), Baxter International Inc. (U.S.), Danaher Corporation (U.S.), Fresenius SE & Co. KGaA (Germany), Merck KGaA (Germany), Nipro Corporation (Japan), Parker-Hannifin Corporation (U.S.), Repligen Corporation (U.S.),

and Sartorius (Germany)

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

Italy

France

Rest of Europe

Asia-Pacific

China

Japan

India

Rest of APAC

Rest of the World (RoW)

Brazil

Rest of Latin America

Middle East and Others

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FIGURE 17 MICROFILTRATION GLOBAL MARKET SHARE, BASED ON REGION, (2021 VS 2028) (%)

FIGURE 18 ULTRAFILTRATION GLOBAL MARKET SHARE, BASED ON REGION, (2021 VS 2028) (%)

FIGURE 19 DEPTH FILTERS GLOBAL MARKET SHARE, BASED ON REGION, (2021 VS 2028) (%)

FIGURE 20 CONSUMABLES GLOBAL MARKET SHARE, BASED ON FILTER USAGE, (2021 V/S 2028) (%)

FIGURE 21 REUSABLE FILTRATION GLOBAL MARKET SHARE, BASED ON REGION, (2021 VS 2028) (%)

FIGURE 22 SINGLE USE FILTRATION GLOBAL MARKET SHARE, BASED ON REGION, (2021 VS 2028) (%)

FIGURE 23 ACCESSORIES GLOBAL MARKET SHARE, BASED ON REGION, (2021 VS 2028) (%)

FIGURE 24 LIFE SCIENCE FILTRATION GLOBAL MARKET SHARE, BASED ON APPLICATION, (2021 V/S 2028) (%)

FIGURE 25 DRUG DISCOVERY, DEVELOPMENT AND MANUFACTURING GLOBAL MARKET SHARE, BASED ON MOLECULES, (2021 V/S 2028) (%)

FIGURE 26 DRUG DISCOVERY, DEVELOPMENT AND MANUFACTURING GLOBAL MARKET SHARE, BASED ON REGION, (2021 VS 2028) (%)

FIGURE 27 SMALL MOLECULE FILTRATION GLOBAL MARKET SHARE, BASED ON REGION, (2021 VS 2028) (%)

FIGURE 28 LARGE MOLECULE FILTRATION GLOBAL MARKET SHARE, BASED ON REGION, (2021 VS 2028) (%)

FIGURE 29 MEDICAL DEVICES GLOBAL MARKET SHARE, BASED ON REGION, (2021 VS 2028) (%)

FIGURE 30 MEDICAL DEVICES GLOBAL MARKET SHARE AND REVENUE, BASED ON TYPE, (2021 VS 2028) (\$ MN) (%)

FIGURE 31 OTHERS GLOBAL MARKET SHARE, BASED ON REGION, (2021 VS 2028) (%)

FIGURE 32 LIFE SCIENC FILTRATION GLOBAL MARKET SHARE, BASED ON END-USERS, (2021 V/S 2028) (%)

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FIGURE 37 LIFE SCIENCE FILTRATION GLOBAL MARKET REVENUE, BY GEOGRAPHY (2021) (\$ MN)

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FIGURE 39 NORTH AMERICA MEMBRANE FILTERS MARKET SHARE, BASED ON

TECHNIQUE (2021 VS 2028) (%)

FIGURE 40 NORTH AMERICA CONSUMABLES MARKET SHARE, BASED ON
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FIGURE 41 NORTH AMERICA LIFE SCIENCE FILTRATION MARKET SHARE,
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FIGURE 44 NORTH AMERICA LIFE SCIENCE FILTRATION MARKET SHARE,
BASED ON COUNTRY (2021 V/S 2028) (%)

FIGURE 45 U.S. LIFE SCIENCE FILTRATION MARKET REVENUE, BASED ON
PRODUCTS & APPLICATION (2021 VS 2028)(\$MN)

FIGURE 46 U.S. LIFE SCIENCE FILTRATION MARKET REVENUE, BASED ON END-
USER (2021 VS 2028)(\$MN)

FIGURE 47 REST OF NORTH AMERICA LIFE SCIENCE FILTRATION MARKET
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USAGE (2021 VS 2028) (%)

FIGURE 52 EUROPE LIFE SCIENCE FILTRATION MARKET SHARE, BASED ON
APPLICATION (2021 VS 2028) (%)

FIGURE 53 EUROPE DRUG DISCOVERY, DEVELOPMENT AND MANUFACTURING
MARKET SHARE, BASED ON MOLECULES (2021 VS 2028) (%)

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FIGURE 73 CHINA LIFE SCIENCE FILTRATION MARKET REVENUE, BASED ON PRODUCTS & APPLICATION (2021 VS 2028) (\$MN)

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FIGURE 83 ROW DRUG DISCOVERY, DEVELOPMENT AND MANUFACTURING MARKET SHARE, BASED ON MOLECULES (2021 VS 2028) (%)

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FIGURE 95 SWOT: ASAHI KASEI CORPORATION

FIGURE 96 SWOT: BAXTER INTERNATIONAL INC

FIGURE 97 SWOT: DANAHER CORPORATION

FIGURE 98 SWOT: FRESENIUS SE & CO. KGAA

FIGURE 99 SWOT: MERCK KGAA

FIGURE 100 SWOT: NIPRO CORPORATION

FIGURE 101 SWOT: PARKER-HANNIFIN CORPORATION

FIGURE 102 SWOT: REPLIGEN CORPORATION

FIGURE 103 SWOT: SARTORIUS

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