

Global Process Chromatography System Market Growth 2026-2032

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Abstracts

The global Process Chromatography System market size is predicted to grow from US\$ 1592 million in 2025 to US\$ 2647 million in 2032; it is expected to grow at a CAGR of 7.6% from 2026 to 2032.

Process chromatography systems are integrated automation platforms used in biopharmaceutical and high-value chemical manufacturing for downstream separation and purification workflows. They combine fluid delivery pumps, multi-position valve assemblies, UV, conductivity, pH, pressure, and flow sensors, fraction collectors, cleaning-in-place (CIP) or single-use flow paths, control software, and data logging modules into a unified system. These systems are designed to interface with chromatography columns, membrane adsorbers, or multi-column units in downstream processes. System configurations are defined by flow path architecture, operating mode, scale range, and pressure class, and are widely used in the capture, intermediate purification, and polishing of monoclonal antibodies, recombinant proteins, vaccines, viral vectors, nucleic acids, peptides, and plasma-derived products. Their core value lies in enabling precise gradient control, batch-to-batch reproducibility, GMP traceability, and seamless scalability from process development to commercial manufacturing. The estimated gross margin is approximately 42%.

Demand for process chromatography systems is primarily driven by expanding biopharmaceutical production capacity and downstream purification bottlenecks. While established modalities such as monoclonal antibodies, bispecific antibodies, and fusion proteins still rely on multi-step chromatography (affinity, ion exchange, hydrophobic interaction, and size exclusion), emerging modalities such as vaccines, viral vectors, nucleic acid therapeutics, and peptides place higher demands on low dead volume, material compatibility, and rapid changeover capability. As a result, customers

increasingly prioritize automation level, data integrity, cleaning validation, single-use flow path compatibility, and regulatory documentation, rather than simply flow rate or column volume.

Continuous chromatography and multi-column systems are becoming key directions in high-value bioprocessing. Economic drivers such as improved resin utilization (especially Protein A), reduced buffer consumption, and smaller facility footprint are accelerating adoption of multi-column capture systems, in-line dilution, buffer preparation integration, and process analytical technology (PAT) interfaces. Single-use systems are increasingly favored in clinical manufacturing, multi-product facilities, and CDMO environments, while stainless-steel systems remain dominant in large-scale, high-throughput, and long-life validated processes.

Chinese manufacturers are gradually entering through pilot-scale systems, customized skids, and partial production-scale platforms. However, large GMP projects continue to require proven control software stability, reliability of critical components, validated documentation systems, and global service capabilities. The market is therefore evolving into a tiered structure: international suppliers dominate high-end continuous and large commercial installations, while domestic vendors expand share through customization, faster delivery, cost advantages, and localized service support.

LP Information, Inc. (LPI) ' newest research report, the "Process Chromatography System Industry Forecast" looks at past sales and reviews total world Process Chromatography System sales in 2025, providing a comprehensive analysis by region and market sector of projected Process Chromatography System sales for 2026 through 2032. With Process Chromatography System sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Process Chromatography System industry.

This Insight Report provides a comprehensive analysis of the global Process Chromatography System landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Process Chromatography System portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Process Chromatography System market.

This Insight Report evaluates the key market trends, drivers, and affecting factors

shaping the global outlook for Process Chromatography System and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Process Chromatography System.

This report presents a comprehensive overview, market shares, and growth opportunities of Process Chromatography System market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Reusable Stainless Steel System

Single-use System

Hybrid Flow Path System

Custom Skid System

Segmentation by Operating Mode:

Batch Chromatography System

Multi-column Continuous System

Simulated Moving Bed System

Preparative HPLC System

Segmentation by Scale Class:

Process Development System

Pilot Scale System

Clinical Manufacturing System

Commercial Manufacturing System

Segmentation by Pressure Class:

Low-pressure System

Medium-pressure System

High-pressure System

Segmentation by Application:

Monoclonal Antibody Purification

Recombinant Protein Purification

Vaccine and Viral Vector Purification

Nucleic Acid and Oligonucleotide Purification

Peptide and Small Molecule Purification

Plasma and Blood Product Purification

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Cytiva

Sartorius

Merck

Thermo Fisher Scientific

Repligen

Bio-Rad

YMC

Asahi Kasei Bioprocess

Sepragen

KNAUER

Labomatic

Waters

Shimadzu

Agilent

Gilson

Hanbon

Tofflon

Truking

Austar

Morimatsu LifeSciences

JYSS Bio

Key Questions Addressed in this Report

What is the 10-year outlook for the global Process Chromatography System market?

What factors are driving Process Chromatography System market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Process Chromatography System market opportunities vary by end market size?

How does Process Chromatography System break out by Type, by Application?

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