

Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing market size is predicted to grow from US\$ 11188 million in 2025 to US\$ 19409 million in 2032; it is expected to grow at a CAGR of 8.4% from 2026 to 2032.

Disposable systems and consumables in biomanufacturing refer to a class of pre-sterilized, closed-loop, modular equipment and components used to replace or supplement traditional stainless steel equipment and reusable flow paths in the manufacturing processes of biopharmaceuticals, vaccines, recombinant proteins, antibodies, viral vectors, mRNA, cell and gene therapy, and some synthetic biology. Core products include disposable bioreactors and fermenters and their matching bags; disposable chromatography systems and pre-packed columns/membrane adsorbers/disposable flow paths; disposable filtration systems and depth filters/TFF/viral filters; disposable mixing and dispensing systems and storage bags/mixing bags; disposable material conveying systems and tubing/connectors/manifolds/sterile fittings; as well as sampling bags, disposable sensors, freeze-thaw bags, cell processing kits, disposable pump heads, and other supporting consumables such as automated flow paths. Overall, the industry has evolved from early replacement of basic consumables such as 'bags, tubing, and connectors' to a complete process platform covering upstream culture, downstream separation and purification, pre-treatment of formulations, and closed-loop fluid management.

From a production stage perspective, the role of disposable systems varies at different stages. The laboratory stage is primarily used for small-scale process exploration, cell culture, sample processing, culture medium or buffer storage, filtration validation, and

parameter screening, emphasizing flexibility, low contamination risk, and ease of operation. The pilot-scale stage is mainly used for process scale-up, parameter transfer, and preclinical or early clinical sample production, emphasizing process consistency and scalability with subsequent large-scale production. The large-scale production stage focuses on the use of disposable bioreactors, disposable bags, filtration/TFF, chromatography, mixing and preparation, storage solutions, tubing connections, and closed transfer systems, emphasizing GMP compliance, batch stability, reliable supply chain, complete validation documentation, and cost control.

The characteristics and application scenarios of various products also differ significantly. Disposable bioreactors and fermenters are mainly used for cell culture, seed amplification, antibody and recombinant protein production, vaccine and viral vector production. Their advantages include reduced CIP/SIP, lower risk of cross-contamination, shorter changeover time, and suitability for CDMO and multi-product production. However, their disadvantages lie in the fact that large-scale, high-intensity microbial fermentation, long-term stable large-volume production, and high-stirring/high-mass-transfer scenarios still face technological limitations. Single-use chromatography systems are primarily used for downstream capture and polishing purification, suitable for multi-product, small-batch, high-value, and rapid changeover scenarios. However, trade-offs remain regarding large-scale commercial processing, resin costs, pressure control, and validation complexity. Single-use filtration systems are the most widely used, covering culture medium filtration, clarification, sterilization, virus filtration, TFF concentration, and fluid exchange, serving as a crucial link in downstream bottleneck mitigation and continuous processes. Single-use mixing and dispensing systems are used for culture media, buffers, pre-mixing of formulations, and intermediate liquid management, forming the infrastructure for improving fluid management efficiency in large-scale production. Single-use material handling equipment and consumables are equivalent to a 'closed-loop fluid network' in bioprocessing, enabling the safe transfer of materials between different unit operations through tubing, connectors, sterile fittings, manifolds, and pumps.

From a supplier perspective, the global market exhibits a structure where multinational platform companies, specialized component companies, and regional local suppliers coexist. Representative multinational companies include Danaher/Cytiva, Thermo Fisher Scientific, Sartorius, Merck KGaA, Repligen, Saint-Gobain, Avantor, Entegris, Parker Hannifin, Meissner, and SaniSure, covering single-use bioreactors, filtration, chromatography, fluid management, piping connections, storage bags, and high-purity material components. Equipment and engineering companies such as ABEC, GEA, and Morimatsu are representative in bioreactors, fermentation, mixing, process engineering,

and modular facilities. Chinese companies such as Dongfulong, Chutian Technology, Lepur Bio, Duoning Bio, Jinyishengshi, Jetech Bio, Hanbang Technology, Saifen Technology, Arios, Bituo Bio, and Boyi Bio are accelerating their efforts to fill gaps in the market, focusing on single-use bags, dispensing systems, filter materials, chromatography media, fluid components, separation and purification consumables, and intelligent manufacturing capabilities.

In the future, the biomanufacturing single-use systems and consumables industry will exhibit five main trends. First, with high penetration of basic consumables, the focus of growth will expand from disposable bioreactors and bags to high-value segments such as downstream filtration, TFF, chromatography, membrane adsorbers, and virus filtration. Second, CDMO, multi-product manufacturing, advanced therapies, and early-stage commercialization projects will continue to drive demand for disposable systems, as these scenarios prioritize rapid changeover, low cross-contamination risk, and flexible capacity. Third, continuous and process-intensified processes will increase requirements for disposable sensors, long-term operating flow paths, ATF/TFF, automated pumps and valves, and PAT systems. Fourth, regulatory and quality requirements will continue to rise, with E&L, material compatibility, sterilization validation, particle control, batch traceability, and supplier change management becoming core aspects of procurement decisions. Fifth, sustainability will become a new dimension of industry competition; in the future, suppliers will need to provide more compelling solutions in areas such as packaging reduction, bio-based or bio-recycling materials, regionalized production, lifecycle assessment, and waste disposal.

The primary characteristic of the global biomanufacturing disposable systems and consumables industry is its evolution from relatively simple basic consumables such as bags, tubing, and filters to a comprehensive portfolio of products covering upstream cultivation, fermentation, solution preparation, storage, transfer, filtration, chromatography, ultrafiltration/washing, sampling, sensing, control, and some downstream purification stages. In the large-scale production stage, disposable bioreactors and fermenters, along with their associated consumables, remain the core components of the market. Bags, culture bags, reaction bags, tubing, connectors, sensors, and fluid management components form the foundation for continuous consumption. This means that market size is not solely driven by the sale of large equipment, but rather by both equipment platforms and high-frequency consumables. For biomanufacturing companies, the procurement logic for disposable systems is no longer simply 'buying a set of equipment,' but rather establishing a verifiable, traceable, and sustainably supplied consumables system centered around complete batch production, process changeover, aseptic transfer, material storage, and batch release.

From a product level perspective, disposable equipment and components can be divided into three categories: The first category is core process equipment, such as disposable bioreactors, disposable mixing and dispensing systems, disposable filtration systems, disposable chromatography systems, disposable TFF systems, and some disposable cell processing equipment; the second category is high-frequency fluid management consumables, such as reservoir bags, culture bags, tubing, connectors, sterile fittings, manifolds, sampling bags, transfer kits, and pump tubing; the third category is functional enhancement components, such as disposable sensors, disposable control flow paths, membrane adsorbers, pre-loaded columns, disposable pump heads, and automated valve assemblies. The industry is moving from the first stage of 'bags replacing tanks' to the second stage of 'components supporting processes,' and is further advancing to the third stage of 'platform supporting infrastructure.' This shift determines that future competition will focus not only on the price of individual consumables, but also on product portfolio completeness, system compatibility, validation documentation packages, material stability, and supplier continuous delivery capabilities.

From a supplier distribution perspective, the global disposable systems and consumables industry exhibits a clear stratification. The first tier consists of multinational platform suppliers, typically covering multiple stages including bioreactoring, mixing and preparation, filtration, chromatography, storage solutions, fluid management, disposable sensing, and process control. These companies possess a global customer base, GMP documentation systems, material databases, validation support capabilities, and cross-regional delivery capabilities. Their advantage lies not only in the variety of their products but also in their ability to participate in the entire lifecycle of their clients, from process development and technology transfer to commercial production, providing replicable platform solutions. The second tier comprises specialized component suppliers, focusing on key components such as membranes, filters, connectors, tubing, pumps, sensors, cell retention devices, bag membrane materials, or high-purity fluid components. While their product range is narrower, their technological depth is high, often determining the reliability, aseptic integrity, long-term operational stability, and material compatibility of the entire disposable system. The third tier consists of regional and local suppliers, primarily relying on localized delivery, cost advantages, engineering response, and customized services to enter the market. They have strong growth potential in China, India, and other rapidly expanding biomanufacturing regions.

This tiered structure is highly relevant to the needs of the large-scale production stage. Large-scale production customers have far higher requirements for single-use systems

than laboratory-scale customers. They need stable batch supply, material change notifications, E&L documentation, sterilization validation, packaging integrity, traceability systems, quality agreements, and supply assurance. Therefore, multinational platform companies still have an advantage in high-end commercial production scenarios; however, with regionalized manufacturing, the expansion of local CDMOs, and increasing cost-reduction pressures on customers, domestic companies have significantly increased opportunities in areas such as bags, mixing solutions, filtration systems, basic fluid components, and some equipment integration. Especially in the Chinese market, domestic suppliers are gradually extending from single consumables to system integration, large-scale equipment, and validation services.

The willingness to use single-use systems in biomanufacturing is already high, especially in areas such as single-use bags, tubing, connectors, storage bags, culture bags, and basic filtration components, which have become essential components of most large-scale production facilities. Single-use bioreactors have also moved from the early rapid introduction phase to a mature and widespread adoption phase, and are widely used in multi-product manufacturing, late-stage clinical projects, CDMO flexible capacity, and some commercial production scenarios. However, this does not mean that the entire industry has entered a period of stagnation. Conversely, with the high penetration of basic components, the market growth logic is shifting from 'first-time adoption' to 'higher frequency consumption, larger-scale upgrades, stronger reliability, more complex process integration, and downstream expansion.' This is also the most noteworthy structural change in the industry today.

From a usage scenario perspective, upstream single-use systems generally have higher acceptance than downstream complex purification systems because the advantages of single-use systems—reduced cleaning, shorter changeover times, and lower contamination risks—are more readily apparent in cell culture, storage, mixing, dispensing, and fluid transfer stages. Downstream stages, constrained by pressure, flow rate, binding capacity, recovery rate, membrane area, chromatography media costs, and the complexity of process validation, have a relatively slower penetration rate. However, with the development of membrane adsorbers, single-use TFFs, pre-packed columns, multi-column chromatography, continuous chromatography, and closed-loop downstream platforms, downstream single-use technologies are becoming an important growth driver in the next stage. Customer usage intentions are also showing more rational characteristics: single-use systems have clear advantages in small-batch, multi-product, high-value, rapid changeover, and contamination risk-sensitive scenarios; while stainless steel systems still offer advantages in unit cost and long-term operation in ultra-large-scale, long-term stable, and high-volume products.

The development of the single-use systems industry is also characterized by continuously increasing quality and regulatory requirements. In the stage of large-scale production, single-use equipment and components directly contact culture media, cells, proteins, antibodies, viral vectors, or intermediate products. Their quality risks stem not only from equipment performance but also from material compatibility, extractables/leaches, particle size, sterilization, packaging integrity, supplier changes, batch traceability, and the integrity of connections during use. As regulatory agencies raise requirements for biopharmaceutical manufacturing processes, contamination control strategies, data integrity, and supplier management, customers are increasingly prioritizing supplier documentation packages, quality systems, and change control when procuring single-use systems, rather than simply comparing prices. For suppliers, the ability to provide complete material information, sterilization validation, E&L support, batch records, and compliance statements has become a basic threshold for entering the large-scale production supply chain.

Cost and sustainability constitute another set of key characteristics. Single-use systems offer comprehensive benefits by reducing cleaning, CIP/SIP, utilities, changeover time, and the risk of cross-contamination; however, their frequent consumption also increases the pressure on consumable procurement. As the market transitions from the introduction phase to maturity, customers are less tolerant of high prices and are paying more attention to per-batch costs, inventory costs, supplier bargaining power, and substitutability. Simultaneously, the challenges of plastic waste, incineration, landfill, and recycling are subjecting single-use systems to greater environmental scrutiny. The industry is shifting from simply emphasizing 'reducing water and cleaning chemicals' to adopting lifecycle assessments, packaging reduction, material optimization, regionalized supply, and recycling solutions.

The downstream customer structure is reshaping the demand logic of the single-use systems and consumables industry. Traditional large pharmaceutical companies focus on commercial supply stability, quality compliance, and long-term costs; emerging biotechnology companies focus on rapid clinical entry, reduced capital investment, and outsourced manufacturing accessibility; CDMOs focus on multi-customer project switchover, capacity utilization, rapid technology transfer, and flexible capacity expansion; cell and gene therapy, mRNA, viral vector, and personalized medicine companies emphasize closed-loop systems, small batches, multiple batches, low contamination risk, and rapid manufacturing. What these different customers have in common is that they no longer view single-use systems merely as tools to save on cleaning costs, but rather as crucial infrastructure for improving manufacturing flexibility,

shortening project cycles, reducing batch switchover risks, and supporting multi-product facility operations.

CDMOs are the most representative demand drivers. CDMO operations inherently involve multiple clients, projects, processes, and batch sizes, requiring production lines to switch rapidly between different molecules, processes, and development stages. Relying on traditional fixed stainless steel systems significantly increases operational complexity due to challenges in cleaning validation, cross-contamination control, production line scheduling, and process changeovers. Disposable systems help CDMOs shorten turnaround times, improve facility utilization, and better handle late-stage clinical, early-stage commercialization, and projects with uncertain demand. Advanced therapies further amplify this logic, as these products typically have smaller batch sizes, higher value, and more personalized processes, demanding even higher standards for closed systems and aseptic transfer.

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

This Insight Report provides a comprehensive analysis of the global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing 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 Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing.

This report presents a comprehensive overview, market shares, and growth opportunities of Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing market by product type, application, key players and key regions and countries.

Segmentation by Type:

Single-use Bioreactors and Fermenters and Related Consumables

Single-use Chromatography Systems and Related Consumables

Single-use Filtration Systems and Related Consumables

Single-use Centrifuges and Related Consumables

Single-use Mixing and Dispensing Systems and Related Consumables

Single-use Material Conveying Equipment and Related Consumables

Others

Segmentation by Product Form:

Disposable System

Related Consumables

Segmentation by Fermentation Volume:

?2000L

?2000L

Segmentation by Application:

Biopharmaceuticals

CDMO/CMO

Others

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 analyzing the company's coverage, product portfolio, its market penetration.

Danaher

Sartorius AG

Merck KGaA

Thermo Fisher Scientific Inc

Saint-Gobain

Cobetter

Duoning Biotech

Avantor

Meissner

SaniSure

Zhejiang JYSS Bio-Engineering

Parker Hannifin

Shanghai Lepure Biotech

NewAge Industries, Inc.

Repligen Corporation

Alfa Laval

ABEC

Levitronix

Entegris

Tofflon

BioLink

Tezalon Biotech

GEA

Austar Group

TruKing Technology

Dover Corp.?CPC Biotech?

Morimatsu Industry

Lisure

Jiangsu Hanbon

Guangzhou JET Bio-filtration

TECNIC

Chanse Technology

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

- 2.1.1 Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size (2021-2032)
- 2.1.2 Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size CAGR by Region (2021 VS 2025 VS 2032)
- 2.1.3 World Current & Future Analysis for Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing by Country/Region (2021, 2025 & 2032)

2.2 Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Segment by Type

- 2.2.1 Single-use Bioreactors and Fermenters and Related Consumables
- 2.2.2 Single-use Chromatography Systems and Related Consumables
- 2.2.3 Single-use Filtration Systems and Related Consumables
- 2.2.4 Single-use Centrifuges and Related Consumables
- 2.2.5 Single-use Mixing and Dispensing Systems and Related Consumables
- 2.2.6 Single-use Material Conveying Equipment and Related Consumables
- 2.2.7 Others
- 2.2.8 Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Type
 - 2.2.8.1 Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size CAGR by Type (2021 VS 2025 VS 2032)
 - 2.2.8.2 Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Market Share by Type (2021-2026)
- 2.3 Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Segment by Product Form

2.3.1 Disposable System

2.3.2 Related Consumables

2.3.3 Single-use Systems and Consumables for Large-Scale Production in
Biomanufacturing Market Size by Product Form

2.3.3.1 Single-use Systems and Consumables for Large-Scale Production in
Biomanufacturing Market Size CAGR by Product Form (2021 VS 2025 VS 2032)

2.3.3.2 Global Single-use Systems and Consumables for Large-Scale Production in
Biomanufacturing Market Size Market Share by Product Form (2021-2026)

2.4 Single-use Systems and Consumables for Large-Scale Production in
Biomanufacturing Segment by Fermentation Volume

2.4.1 ?2000L

2.4.2 ?2000L

2.4.3 Single-use Systems and Consumables for Large-Scale Production in
Biomanufacturing Market Size by Fermentation Volume

2.4.3.1 Single-use Systems and Consumables for Large-Scale Production in
Biomanufacturing Market Size CAGR by Fermentation Volume (2021 VS 2025 VS
2032)

2.4.3.2 Global Single-use Systems and Consumables for Large-Scale Production in
Biomanufacturing Market Size Market Share by Fermentation Volume (2021-2026)

2.5 Single-use Systems and Consumables for Large-Scale Production in
Biomanufacturing Segment by Application

2.5.1 Biopharmaceuticals

2.5.2 CDMO/CMO

2.5.3 Others

2.5.4 Single-use Systems and Consumables for Large-Scale Production in
Biomanufacturing Market Size by Application

2.5.4.1 Single-use Systems and Consumables for Large-Scale Production in
Biomanufacturing Market Size CAGR by Application (2021 VS 2025 VS 2032)

2.5.4.2 Global Single-use Systems and Consumables for Large-Scale Production in
Biomanufacturing Market Size Market Share by Application (2021-2026)

3 SINGLE-USE SYSTEMS AND CONSUMABLES FOR LARGE-SCALE PRODUCTION IN BIOMANUFACTURING MARKET SIZE BY PLAYER

3.1 Single-use Systems and Consumables for Large-Scale Production in
Biomanufacturing Market Size Market Share by Player

3.1.1 Global Single-use Systems and Consumables for Large-Scale Production in
Biomanufacturing Revenue by Player (2021-2026)

3.1.2 Global Single-use Systems and Consumables for Large-Scale Production in

Biomanufacturing Revenue Market Share by Player (2021-2026)

3.2 Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Key Players Head office and Products Offered

3.3 Market Concentration Rate Analysis

3.3.1 Competition Landscape Analysis

3.3.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.4 New Products and Potential Entrants

3.5 Mergers & Acquisitions, Expansion

4 SINGLE-USE SYSTEMS AND CONSUMABLES FOR LARGE-SCALE PRODUCTION IN BIOMANUFACTURING BY REGION

4.1 Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Region (2021-2026)

4.2 Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Annual Revenue by Country/Region (2021-2026)

4.3 Americas Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Growth (2021-2026)

4.4 APAC Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Growth (2021-2026)

4.5 Europe Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Growth (2021-2026)

4.6 Middle East & Africa Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Growth (2021-2026)

5 AMERICAS

5.1 Americas Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Country (2021-2026)

5.2 Americas Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Type (2021-2026)

5.3 Americas Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Growth (Status...

6.1 APAC Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Region (2021-2026)

6.2 APAC Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Type (2021-2026)

6.3 APAC Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

7 EUROPE

7.1 Europe Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Country (2021-2026)

7.2 Europe Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Type (2021-2026)

7.3 Europe Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing by Region (2021-2026)

8.2 Middle East & Africa Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Type (2021-2026)

8.3 Middle East & Africa Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 GLOBAL SINGLE-USE SYSTEMS AND CONSUMABLES FOR LARGE-SCALE PRODUCTION IN BIOMANUFACTURING MARKET FORECAST

10.1 Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Forecast by Region (2027-2032)

10.1.1 Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Forecast by Region (2027-2032)

10.1.2 Americas Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Forecast

10.1.3 APAC Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Forecast

10.1.4 Europe Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Forecast

10.1.5 Middle East & Africa Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Forecast

10.2 Americas Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Forecast by Country (2027-2032)

10.2.1 United States Market Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Forecast

10.2.2 Canada Market Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Forecast

10.2.3 Mexico Market Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Forecast

10.2.4 Brazil Market Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Forecast

10.3 APAC Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Forecast by Region (2027-2032)

10.3.1 China Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Forecast

10.3.2 Japan Market Single-use Systems and Consumables for Large-Scale

Production in Biomanufacturing Forecast

10.3.3 Korea Market Single-use Systems and Consumables for Large-Scale

Production in Biomanufacturing Forecast

10.3.4 Southeast Asia Market Single-use Systems and Consumables for Large-Scale

Production in Biomanufacturing Forecast

10.3.5 India Market Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Forecast

10.3.6 Australia Market Single-use Systems and Consumables for Large-Scale

Production in Biomanufacturing Forecast

10.4 Europe Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Forecast by Country (2027-2032)

10.4.1 Germany Market Single-use Systems and Consumables for Large-Scale

Production in Biomanufacturing Forecast

10.4.2 France Market Single-use Systems and Consumables for Large-Scale

Production in Biomanufacturing Forecast

10.4.3 UK Market Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Forecast

10.4.4 Italy Market Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Forecast

10.4.5 Russia Market Single-use Systems and Consumables for Large-Scale

Production in Biomanufacturing Forecast

10.5 Middle East & Africa Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Forecast by Region (2027-2032)

10.5.1 Egypt Market Single-use Systems and Consumables for Large-Scale

Production in Biomanufacturing Forecast

10.5.2 South Africa Market Single-use Systems and Consumables for Large-Scale

Production in Biomanufacturing Forecast

10.5.3 Israel Market Single-use Systems and Consumables for Large-Scale

Production in Biomanufacturing Forecast

10.5.4 Turkey Market Single-use Systems and Consumables for Large-Scale

Production in Biomanufacturing Forecast

10.6 Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Forecast by Type (2027-2032)

10.7 Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Forecast by Application (2027-2032)

10.7.1 GCC Countries Market Single-use Systems and Consumables for Large-Scale

Production in Biomanufacturing Forecast

11 KEY PLAYERS ANALYSIS

11.1 Danaher

11.1.1 Danaher Company Information

11.1.2 Danaher Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

11.1.3 Danaher Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)

11.1.4 Danaher Main Business Overview

11.1.5 Danaher Latest Developments

11.2 Sartorius AG

11.2.1 Sartorius AG Company Information

11.2.2 Sartorius AG Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

11.2.3 Sartorius AG Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)

11.2.4 Sartorius AG Main Business Overview

11.2.5 Sartorius AG Latest Developments

11.3 Merck KGaA

11.3.1 Merck KGaA Company Information

11.3.2 Merck KGaA Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

11.3.3 Merck KGaA Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)

11.3.4 Merck KGaA Main Business Overview

11.3.5 Merck KGaA Latest Developments

11.4 Thermo Fisher Scientific Inc

11.4.1 Thermo Fisher Scientific Inc Company Information

11.4.2 Thermo Fisher Scientific Inc Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

11.4.3 Thermo Fisher Scientific Inc Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)

11.4.4 Thermo Fisher Scientific Inc Main Business Overview

11.4.5 Thermo Fisher Scientific Inc Latest Developments

11.5 Saint-Gobain

11.5.1 Saint-Gobain Company Information

11.5.2 Saint-Gobain Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

11.5.3 Saint-Gobain Single-use Systems and Consumables for Large-Scale

Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)

11.5.4 Saint-Gobain Main Business Overview

11.5.5 Saint-Gobain Latest Developments

11.6 Cobetter

11.6.1 Cobetter Company Information

11.6.2 Cobetter Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

11.6.3 Cobetter Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)

11.6.4 Cobetter Main Business Overview

11.6.5 Cobetter Latest Developments

11.7 Duoning Biotech

11.7.1 Duoning Biotech Company Information

11.7.2 Duoning Biotech Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

11.7.3 Duoning Biotech Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)

11.7.4 Duoning Biotech Main Business Overview

11.7.5 Duoning Biotech Latest Developments

11.8 Avantor

11.8.1 Avantor Company Information

11.8.2 Avantor Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

11.8.3 Avantor Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)

11.8.4 Avantor Main Business Overview

11.8.5 Avantor Latest Developments

11.9 Meissner

11.9.1 Meissner Company Information

11.9.2 Meissner Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

11.9.3 Meissner Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)

11.9.4 Meissner Main Business Overview

11.9.5 Meissner Latest Developments

11.10 SaniSure

11.10.1 SaniSure Company Information

11.10.2 SaniSure Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

11.10.3 SaniSure Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)

11.10.4 SaniSure Main Business Overview

11.10.5 SaniSure Latest Developments

11.11 Zhejiang JYSS Bio-Engineering

11.11.1 Zhejiang JYSS Bio-Engineering Company Information

11.11.2 Zhejiang JYSS Bio-Engineering Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

11.11.3 Zhejiang JYSS Bio-Engineering Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)

11.11.4 Zhejiang JYSS Bio-Engineering Main Business Overview

11.11.5 Zhejiang JYSS Bio-Engineering Latest Developments

11.12 Parker Hannifin

11.12.1 Parker Hannifin Company Information

11.12.2 Parker Hannifin Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

11.12.3 Parker Hannifin Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)

11.12.4 Parker Hannifin Main Business Overview

11.12.5 Parker Hannifin Latest Developments

11.13 Shanghai Lepure Biotech

11.13.1 Shanghai Lepure Biotech Company Information

11.13.2 Shanghai Lepure Biotech Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

11.13.3 Shanghai Lepure Biotech Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)

11.13.4 Shanghai Lepure Biotech Main Business Overview

11.13.5 Shanghai Lepure Biotech Latest Developments

11.14 NewAge Industries, Inc.

11.14.1 NewAge Industries, Inc. Company Information

11.14.2 NewAge Industries, Inc. Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

11.14.3 NewAge Industries, Inc. Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)

11.14.4 NewAge Industries, Inc. Main Business Overview

11.14.5 NewAge Industries, Inc. Latest Developments

11.15 Repligen Corporation

11.15.1 Repligen Corporation Company Information

11.15.2 Repligen Corporation Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

11.15.3 Repligen Corporation Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)

11.15.4 Repligen Corporation Main Business Overview

11.15.5 Repligen Corporation Latest Developments

11.16 Alfa Laval

11.16.1 Alfa Laval Company Information

11.16.2 Alfa Laval Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

11.16.3 Alfa Laval Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)

11.16.4 Alfa Laval Main Business Overview

11.16.5 Alfa Laval Latest Developments

11.17 ABEC

11.17.1 ABEC Company Information

11.17.2 ABEC Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

11.17.3 ABEC Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)

11.17.4 ABEC Main Business Overview

11.17.5 ABEC Latest Developments

11.18 Levitronix

11.18.1 Levitronix Company Information

11.18.2 Levitronix Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

11.18.3 Levitronix Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)

11.18.4 Levitronix Main Business Overview

11.18.5 Levitronix Latest Developments

11.19 Entegris

11.19.1 Entegris Company Information

11.19.2 Entegris Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

11.19.3 Entegris Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)

11.19.4 Entegris Main Business Overview

- 11.19.5 Entegris Latest Developments
- 11.20 Tofflon
 - 11.20.1 Tofflon Company Information
 - 11.20.2 Tofflon Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered
 - 11.20.3 Tofflon Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)
 - 11.20.4 Tofflon Main Business Overview
 - 11.20.5 Tofflon Latest Developments
- 11.21 BioLink
 - 11.21.1 BioLink Company Information
 - 11.21.2 BioLink Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered
 - 11.21.3 BioLink Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)
 - 11.21.4 BioLink Main Business Overview
 - 11.21.5 BioLink Latest Developments
- 11.22 Tezalon Biotech
 - 11.22.1 Tezalon Biotech Company Information
 - 11.22.2 Tezalon Biotech Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered
 - 11.22.3 Tezalon Biotech Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)
 - 11.22.4 Tezalon Biotech Main Business Overview
 - 11.22.5 Tezalon Biotech Latest Developments
- 11.23 GEA
 - 11.23.1 GEA Company Information
 - 11.23.2 GEA Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered
 - 11.23.3 GEA Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)
 - 11.23.4 GEA Main Business Overview
 - 11.23.5 GEA Latest Developments
- 11.24 Austar Group
 - 11.24.1 Austar Group Company Information
 - 11.24.2 Austar Group Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered
 - 11.24.3 Austar Group Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)

- 11.24.4 Austar Group Main Business Overview
- 11.24.5 Austar Group Latest Developments
- 11.25 Truking Technology
 - 11.25.1 Truking Technology Company Information
 - 11.25.2 Truking Technology Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered
 - 11.25.3 Truking Technology Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)
 - 11.25.4 Truking Technology Main Business Overview
 - 11.25.5 Truking Technology Latest Developments
- 11.26 Dover Corp.?CPC Biotech?
 - 11.26.1 Dover Corp.?CPC Biotech? Company Information
 - 11.26.2 Dover Corp.?CPC Biotech? Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered
 - 11.26.3 Dover Corp.?CPC Biotech? Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)
 - 11.26.4 Dover Corp.?CPC Biotech? Main Business Overview
 - 11.26.5 Dover Corp.?CPC Biotech? Latest Developments
- 11.27 Morimatsu Industry
 - 11.27.1 Morimatsu Industry Company Information
 - 11.27.2 Morimatsu Industry Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered
 - 11.27.3 Morimatsu Industry Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)
 - 11.27.4 Morimatsu Industry Main Business Overview
 - 11.27.5 Morimatsu Industry Latest Developments
- 11.28 Lisure
 - 11.28.1 Lisure Company Information
 - 11.28.2 Lisure Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered
 - 11.28.3 Lisure Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)
 - 11.28.4 Lisure Main Business Overview
 - 11.28.5 Lisure Latest Developments
- 11.29 Jiangsu Hanbon
 - 11.29.1 Jiangsu Hanbon Company Information
 - 11.29.2 Jiangsu Hanbon Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

- 11.29.3 Jiangsu Hanbon Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)
- 11.29.4 Jiangsu Hanbon Main Business Overview
- 11.29.5 Jiangsu Hanbon Latest Developments
- 11.30 Guangzhou JET Bio-filtration
 - 11.30.1 Guangzhou JET Bio-filtration Company Information
 - 11.30.2 Guangzhou JET Bio-filtration Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered
 - 11.30.3 Guangzhou JET Bio-filtration Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)
 - 11.30.4 Guangzhou JET Bio-filtration Main Business Overview
 - 11.30.5 Guangzhou JET Bio-filtration Latest Developments
- 11.31 TECNIC
 - 11.31.1 TECNIC Company Information
 - 11.31.2 TECNIC Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered
 - 11.31.3 TECNIC Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)
 - 11.31.4 TECNIC Main Business Overview
 - 11.31.5 TECNIC Latest Developments
- 11.32 Chanse Technology
 - 11.32.1 Chanse Technology Company Information
 - 11.32.2 Chanse Technology Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered
 - 11.32.3 Chanse Technology Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue, Gross Margin and Market Share (2021-2026)
 - 11.32.4 Chanse Technology Main Business Overview
 - 11.32.5 Chanse Technology Latest Developments

12 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size CAGR by Region (2021 VS 2025 VS 2032) & (\$ millions)

Table 2. Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Single-use Bioreactors and Fermenters and Related Consumables

Table 4. Major Players of Single-use Chromatography Systems and Related Consumables

Table 5. Major Players of Single-use Filtration Systems and Related Consumables

Table 6. Major Players of Single-use Centrifuges and Related Consumables

Table 7. Major Players of Single-use Mixing and Dispensing Systems and Related Consumables

Table 8. Major Players of Single-use Material Conveying Equipment and Related Consumables

Table 9. Major Players of Others

Table 10. Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size CAGR by Type (2021 VS 2025 VS 2032) & (\$ millions)

Table 11. Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Type (2021-2026) & (\$ millions)

Table 12. Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Market Share by Type (2021-2026)

Table 13. Major Players of Disposable System

Table 14. Major Players of Related Consumables

Table 15. Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size CAGR by Product Form (2021 VS 2025 VS 2032) & (\$ millions)

Table 16. Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Product Form (2021-2026) & (\$ millions)

Table 17. Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Market Share by Product Form (2021-2026)

Table 18. Major Players of ?2000L

Table 19. Major Players of ?2000L

Table 20. Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size CAGR by Fermentation Volume (2021 VS 2025 VS

2032) & (\$ millions)

Table 21. Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Fermentation Volume (2021-2026) & (\$ millions)

Table 22. Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Market Share by Fermentation Volume (2021-2026)

Table 23. Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size CAGR by Application (2021 VS 2025 VS 2032) & (\$ millions)

Table 24. Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Application (2021-2026) & (\$ millions)

Table 25. Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Market Share by Application (2021-2026)

Table 26. Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue by Player (2021-2026) & (\$ millions)

Table 27. Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue Market Share by Player (2021-2026)

Table 28. Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Key Players Head office and Products Offered

Table 29. Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 30. New Products and Potential Entrants

Table 31. Mergers & Acquisitions, Expansion

Table 32. Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Region (2021-2026) & (\$ millions)

Table 33. Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Market Share by Region (2021-2026)

Table 34. Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue by Country/Region (2021-2026) & (\$ millions)

Table 35. Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue Market Share by Country/Region (2021-2026)

Table 36. Americas Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Country (2021-2026) & (\$ millions)

Table 37. Americas Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Market Share by Country (2021-2026)

Table 38. Americas Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Type (2021-2026) & (\$ millions)

Table 39. Americas Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Market Share by Type (2021-2026)

Table 40. Americas Single-use Systems and Consumables for Large-Scale Production

in Biomanufacturing Market Size by Application (2021-2026) & (\$ millions)

Table 41. Americas Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Market Share by Application (2021-2026)

Table 42. APAC Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Region (2021-2026) & (\$ millions)

Table 43. APAC Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Market Share by Region (2021-2026)

Table 44. APAC Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Type (2021-2026) & (\$ millions)

Table 45. APAC Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Application (2021-2026) & (\$ millions)

Table 46. Europe Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Country (2021-2026) & (\$ millions)

Table 47. Europe Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Market Share by Country (2021-2026)

Table 48. Europe Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Type (2021-2026) & (\$ millions)

Table 49. Europe Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Application (2021-2026) & (\$ millions)

Table 50. Middle East & Africa Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Region (2021-2026) & (\$ millions)

Table 51. Middle East & Africa Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Type (2021-2026) & (\$ millions)

Table 52. Middle East & Africa Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size by Application (2021-2026) & (\$ millions)

Table 53. Key Market Drivers & Growth Opportunities of Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing

Table 54. Key Market Challenges & Risks of Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing

Table 55. Key Industry Trends of Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing

Table 56. Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Forecast by Region (2027-2032) & (\$ millions)

Table 57. Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Market Share Forecast by Region (2027-2032)

Table 58. Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Forecast by Type (2027-2032) & (\$ millions)

Table 59. Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Forecast by Application (2027-2032) & (\$ millions)

Table 60. Danaher Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors
Table 61. Danaher Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered
Table 62. Danaher Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 63. Danaher Main Business
Table 64. Danaher Latest Developments
Table 65. Sartorius AG Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors
Table 66. Sartorius AG Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered
Table 67. Sartorius AG Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 68. Sartorius AG Main Business
Table 69. Sartorius AG Latest Developments
Table 70. Merck KGaA Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors
Table 71. Merck KGaA Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered
Table 72. Merck KGaA Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 73. Merck KGaA Main Business
Table 74. Merck KGaA Latest Developments
Table 75. Thermo Fisher Scientific Inc Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors
Table 76. Thermo Fisher Scientific Inc Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered
Table 77. Thermo Fisher Scientific Inc Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 78. Thermo Fisher Scientific Inc Main Business
Table 79. Thermo Fisher Scientific Inc Latest Developments
Table 80. Saint-Gobain Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors
Table 81. Saint-Gobain Single-use Systems and Consumables for Large-Scale

Production in Biomanufacturing Product Offered

Table 82. Saint-Gobain Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 83. Saint-Gobain Main Business

Table 84. Saint-Gobain Latest Developments

Table 85. Cobetter Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors

Table 86. Cobetter Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

Table 87. Cobetter Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 88. Cobetter Main Business

Table 89. Cobetter Latest Developments

Table 90. Duoning Biotech Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors

Table 91. Duoning Biotech Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

Table 92. Duoning Biotech Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 93. Duoning Biotech Main Business

Table 94. Duoning Biotech Latest Developments

Table 95. Avantor Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors

Table 96. Avantor Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

Table 97. Avantor Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 98. Avantor Main Business

Table 99. Avantor Latest Developments

Table 100. Meissner Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors

Table 101. Meissner Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

Table 102. Meissner Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 103. Meissner Main Business

Table 104. Meissner Latest Developments
Table 105. SaniSure Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors
Table 106. SaniSure Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered
Table 107. SaniSure Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 108. SaniSure Main Business
Table 109. SaniSure Latest Developments
Table 110. Zhejiang JYSS Bio-Engineering Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors
Table 111. Zhejiang JYSS Bio-Engineering Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered
Table 112. Zhejiang JYSS Bio-Engineering Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 113. Zhejiang JYSS Bio-Engineering Main Business
Table 114. Zhejiang JYSS Bio-Engineering Latest Developments
Table 115. Parker Hannifin Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors
Table 116. Parker Hannifin Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered
Table 117. Parker Hannifin Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 118. Parker Hannifin Main Business
Table 119. Parker Hannifin Latest Developments
Table 120. Shanghai Lepure Biotech Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors
Table 121. Shanghai Lepure Biotech Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered
Table 122. Shanghai Lepure Biotech Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 123. Shanghai Lepure Biotech Main Business
Table 124. Shanghai Lepure Biotech Latest Developments

Table 125. NewAge Industries, Inc. Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors

Table 126. NewAge Industries, Inc. Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

Table 127. NewAge Industries, Inc. Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 128. NewAge Industries, Inc. Main Business

Table 129. NewAge Industries, Inc. Latest Developments

Table 130. Repligen Corporation Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors

Table 131. Repligen Corporation Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

Table 132. Repligen Corporation Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 133. Repligen Corporation Main Business

Table 134. Repligen Corporation Latest Developments

Table 135. Alfa Laval Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors

Table 136. Alfa Laval Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

Table 137. Alfa Laval Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 138. Alfa Laval Main Business

Table 139. Alfa Laval Latest Developments

Table 140. ABEC Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors

Table 141. ABEC Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

Table 142. ABEC Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 143. ABEC Main Business

Table 144. ABEC Latest Developments

Table 145. Levitronix Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors

Table 146. Levitronix Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

Table 147. Levitronix Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 148. Levitronix Main Business

Table 149. Levitronix Latest Developments

Table 150. Entegris Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors

Table 151. Entegris Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

Table 152. Entegris Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 153. Entegris Main Business

Table 154. Entegris Latest Developments

Table 155. Tofflon Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors

Table 156. Tofflon Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

Table 157. Tofflon Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 158. Tofflon Main Business

Table 159. Tofflon Latest Developments

Table 160. BioLink Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors

Table 161. BioLink Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

Table 162. BioLink Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 163. BioLink Main Business

Table 164. BioLink Latest Developments

Table 165. Tezalon Biotech Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors

Table 166. Tezalon Biotech Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

Table 167. Tezalon Biotech Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 168. Tezalon Biotech Main Business

Table 169. Tezalon Biotech Latest Developments

Table 170. GEA Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors

Table 171. GEA Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

Table 172. GEA Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 173. GEA Main Business

Table 174. GEA Latest Developments

Table 175. Austar Group Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors

Table 176. Austar Group Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

Table 177. Austar Group Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 178. Austar Group Main Business

Table 179. Austar Group Latest Developments

Table 180. Truiking Technology Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors

Table 181. Truiking Technology Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

Table 182. Truiking Technology Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 183. Truiking Technology Main Business

Table 184. Truiking Technology Latest Developments

Table 185. Dover Corp.?CPC Biotech? Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors

Table 186. Dover Corp.?CPC Biotech? Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

Table 187. Dover Corp.?CPC Biotech? Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 188. Dover Corp.?CPC Biotech? Main Business

Table 189. Dover Corp.?CPC Biotech? Latest Developments

Table 190. Morimatsu Industry Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors

Table 191. Morimatsu Industry Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

Table 192. Morimatsu Industry Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 193. Morimatsu Industry Main Business

Table 194. Morimatsu Industry Latest Developments

Table 195. Lisure Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors

Table 196. Lisure Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

Table 197. Lisure Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 198. Lisure Main Business

Table 199. Lisure Latest Developments

Table 200. Jiangsu Hanbon Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors

Table 201. Jiangsu Hanbon Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

Table 202. Jiangsu Hanbon Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 203. Jiangsu Hanbon Main Business

Table 204. Jiangsu Hanbon Latest Developments

Table 205. Guangzhou JET Bio-filtration Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors

Table 206. Guangzhou JET Bio-filtration Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

Table 207. Guangzhou JET Bio-filtration Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 208. Guangzhou JET Bio-filtration Main Business

Table 209. Guangzhou JET Bio-filtration Latest Developments

Table 210. TECNIC Details, Company Type, Single-use Systems and Consumables for

Large-Scale Production in Biomanufacturing Area Served and Its Competitors

Table 211. TECNIC Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

Table 212. TECNIC Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 213. TECNIC Main Business

Table 214. TECNIC Latest Developments

Table 215. Chanse Technology Details, Company Type, Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Area Served and Its Competitors

Table 216. Chanse Technology Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Product Offered

Table 217. Chanse Technology Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 218. Chanse Technology Main Business

Table 219. Chanse Technology Latest Developments

List Of Figures

LIST OF FIGURES

Figure 1. Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Report Years Considered

Figure 2. Research Objectives

Figure 3. Research Methodology

Figure 4. Research Process and Data Source

Figure 5. Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Growth Rate (2021-2032) (\$ millions)

Figure 6. Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Figure 7. Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Sales Market Share by Country/Region (2025)

Figure 8. Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Sales Market Share by Country/Region (2021, 2025 & 2032)

Figure 9. Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Market Share by Type in 2025

Figure 10. Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Market Share by Product Form in 2025

Figure 11. Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Market Share by Fermentation Volume in 2025

Figure 12. Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing in Biopharmaceuticals

Figure 13. Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market: Biopharmaceuticals (2021-2026) & (\$ millions)

Figure 14. Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing in CDMO/CMO

Figure 15. Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market: CDMO/CMO (2021-2026) & (\$ millions)

Figure 16. Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing in Others

Figure 17. Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market: Others (2021-2026) & (\$ millions)

Figure 18. Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Market Share by Application in 2025

Figure 19. Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Revenue Market Share by Player in 2025

Figure 20. Global Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Market Share by Region (2021-2026)

Figure 21. Americas Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size 2021-2026 (\$ millions)

Figure 22. APAC Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size 2021-2026 (\$ millions)

Figure 23. Europe Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size 2021-2026 (\$ millions)

Figure 24. Middle East & Africa Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size 2021-2026 (\$ millions)

Figure 25. Americas Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Value Market Share by Country in 2025

Figure 26. United States Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Growth 2021-2026 (\$ millions)

Figure 27. Canada Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Growth 2021-2026 (\$ millions)

Figure 28. Mexico Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Growth 2021-2026 (\$ millions)

Figure 29. Brazil Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Growth 2021-2026 (\$ millions)

Figure 30. APAC Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Market Share by Region in 2025

Figure 31. APAC Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Market Share by Type (2021-2026)

Figure 32. APAC Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Market Share by Application (2021-2026)

Figure 33. China Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Growth 2021-2026 (\$ millions)

Figure 34. Japan Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Growth 2021-2026 (\$ millions)

Figure 35. South Korea Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Growth 2021-2026 (\$ millions)

Figure 36. Southeast Asia Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Growth 2021-2026 (\$ millions)

Figure 37. India Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Growth 2021-2026 (\$ millions)

Figure 38. Australia Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Growth 2021-2026 (\$ millions)

Figure 39. Europe Single-use Systems and Consumables for Large-Scale Production in

Biomanufacturing Market Size Market Share by Country in 2025

Figure 40. Europe Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Market Share by Type (2021-2026)

Figure 41. Europe Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Market Share by Application (2021-2026)

Figure 42. Germany Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Growth 2021-2026 (\$ millions)

Figure 43. France Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Growth 2021-2026 (\$ millions)

Figure 44. UK Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Growth 2021-2026 (\$ millions)

Figure 45. Italy Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Growth 2021-2026 (\$ millions)

Figure 46. Russia Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Growth 2021-2026 (\$ millions)

Figure 47. Middle East & Africa Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Market Share by Region (2021-2026)

Figure 48. Middle East & Africa Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Market Share by Type (2021-2026)

Figure 49. Middle East & Africa Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Market Share by Application (2021-2026)

Figure 50. Egypt Single-use Systems and Consumables for Large-Scale Production in Biomanufacturing Market Size Growth 2021-2026 (\$ millions)

Figure 51. South Africa Single-use Systems and Consumables for Large-Scale Production in Biomanufac

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