

Global Water-free Automated Cell Thawing System Market Growth 2026-2032

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Abstracts

The global Water-free Automated Cell Thawing System market size is predicted to grow from US\$ 117 million in 2025 to US\$ 259 million in 2032; it is expected to grow at a CAGR of 11.7% from 2026 to 2032.

Water-free Automated Cell Thawing System refers to automated equipment designed to rapidly thaw frozen biological samples, including cells, tissues and biological materials, without using traditional water baths. The system uses dry heating, conductive heating, air circulation or other controlled thermal technologies to provide precise and reproducible thawing conditions.

Compared with conventional manual thawing methods, water-free automated cell thawing systems reduce contamination risks, improve temperature consistency and minimize operator-dependent variation. These systems are commonly used in cell therapy development, biobanking, regenerative medicine, biotechnology research and pharmaceutical manufacturing.

Key product parameters include thawing temperature accuracy, processing capacity, thawing time, sample compatibility, automation level, contamination control capability and system reliability.

Market Insights

Global sales volume of Water-free Automated Cell Thawing System is projected to reach approximately 4,200 units in 2025.

The average selling price is estimated at around \$28,500 per unit in 2025.

Manufacturers' average gross margins are expected to range from 45% to 60%.

Key applications include cell therapy R&D and biopharmaceutical manufacturing.

Automation, high consistency, and reduced contamination risk are critical competitive factors.

Market Trends

Dry, automated cell thawing systems are evolving from laboratory auxiliary tools into standardized, automated equipment within cell therapy and biomanufacturing workflows. As the cell therapy, gene therapy, and regenerative medicine industries expand, demand for cell processing equipment offering high consistency and low contamination risk continues to rise.

Traditional water-bath thawing methods suffer from issues such as reliance on manual operation, difficulties in contamination control, and inconsistent temperatures; this has driven the adoption of dry, automated technology in high-value cell processing scenarios.

Future product development will focus on increasing throughput, enhancing automation, optimizing temperature control precision, and integrating systems with broader cell processing workflows.

Market Dynamics

Drivers

The growth of the cell therapy and regenerative medicine industries is a major driver of demand for dry, automated cell thawing systems. As cell products move toward commercialization, production processes increasingly require standardized, automated equipment.

Restraints

High equipment procurement costs and the need for compatibility across diverse cell types and sample requirements (which demand varying thawing conditions) pose challenges. Additionally, some laboratories remain accustomed to traditional, low-cost

thawing methods.

Opportunities

With the scaling up of cell therapy production and the expansion of biobanking, there is significant growth potential for automated thawing equipment that improves cell processing quality and reduces human error.

Industry Challenges

The industry faces challenges regarding equipment cost control, adaptability to diverse sample types, and increasingly stringent regulatory requirements. Companies must continuously optimize system stability and process compatibility.

Value Chain Analysis

Upstream: Suppliers provide temperature control systems, electronic components, mechanical parts, and automation control modules.

Midstream: Value is created through equipment manufacturing, automation control development, and the optimization of temperature control technology; core competitiveness lies in precise control of the thawing process, sample protection capabilities, and system reliability. The downstream sector primarily encompasses cell therapy R&D, drug development, biological sample storage, and biopharmaceutical manufacturing.

Market

Segment Insights

By Heating Technology

Dry-heating systems achieve sample thawing via direct heat conduction; characterized by low contamination risk and stable temperature control, they represent the primary direction of current development.

Air-circulation heating systems regulate temperature through circulating hot air, making them suitable for sample processing scenarios that require a gentle heating

environment.

Hybrid temperature-control systems integrate multiple heating and sensing technologies to deliver automated thawing capabilities with higher precision.

By Application Area

Cell therapy R&D is a key application area, focusing primarily on cell viability, thawing consistency, and operational standardization.

Biobanking applications prioritize reliability and reproducibility during the processing of long-term stored samples.

The biopharmaceutical manufacturing sector emphasizes equipment automation, batch consistency, and compatibility with production workflows.

Regional Insights

North America, with its mature cell therapy industry and biopharmaceutical R&D ecosystem, serves as a major market for waterless automated cell thawing systems. Europe maintains steady demand, driven by advanced medical research and biotechnology development. The Asia-Pacific region shows growing market potential, fueled by the expansion of the cell therapy industry, increased investment in biomedicine, and enhanced scientific research capabilities.

Competitive Landscape Analysis

Key players in the waterless automated cell thawing market include life science equipment companies, providers of cell therapy tools, and manufacturers of laboratory automation equipment.

Competition centers on temperature control precision, the level of automation, sample compatibility, equipment reliability, and the ability to integrate into the overall cell processing workflow.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the "Water-free Automated Cell Thawing System Industry Forecast" looks at past sales and reviews total world Water-

free Automated Cell Thawing System sales in 2025, providing a comprehensive analysis by region and market sector of projected Water-free Automated Cell Thawing System sales for 2026 through 2032. With Water-free Automated Cell Thawing System sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Water-free Automated Cell Thawing System industry.

This Insight Report provides a comprehensive analysis of the global Water-free Automated Cell Thawing 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 Water-free Automated Cell Thawing System portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Water-free Automated Cell Thawing System market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Water-free Automated Cell Thawing 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 Water-free Automated Cell Thawing System.

This report presents a comprehensive overview, market shares, and growth opportunities of Water-free Automated Cell Thawing System market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Dry Heating-Based System

Air Circulation Heating System

Hybrid Thermal Control System

Segmentation by Automation Level:

Semi-Automated Cell Thawing System

Fully Automated Cell Thawing System

Segmentation by Sample Type:

Cell Therapy Products

Stem Cell Samples

Biological Research Samples

Biobank Samples

Segmentation by Application:

Biomedical Science

Scientific Research

Other

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.

BioLife Solutions, Inc.

Sartorius AG

Thermo Fisher Scientific Inc.

Cytiva

Hamilton Company

Brooks Life Sciences

Asymptote Ltd.

Helmer Scientific

Miltenyi Biotec

Shenzhen Vita Technology Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Water-free Automated Cell Thawing System market?

What factors are driving Water-free Automated Cell Thawing System market growth, globally and by region?

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

How do Water-free Automated Cell Thawing System market opportunities vary by end market size?

How does Water-free Automated Cell Thawing System break out by Type, by Application?

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