

Cell Culture Market by Product (Consumables (Media, Sera, Reagents), Vessels (Roller Bottle, Cell Factory, Flask), Equipment (SU Bioreactor, Storage, Incubators, Filtration)), Application (mAbs, Vaccines, Regenerative Medicine) - Global Forecast to 2029

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Abstracts

The cell culture market is projected to reach USD 57.9 billion by 2029 from an estimated USD 30.9 billion in 2024, at a CAGR of 13.4% during the forecast period of 2024 to 2029. The growth of this market can be attributed to growing investments and fundings for research in the field of cell biology. The rising incidence of chronic diseases such as cancer is boosting the demand for advanced therapies such as tissue engineering, and regenerative medicine. This trend is expected to drive the growth of the cell culture market in the coming years.

“The biopharmaceutical production segment accounted for the largest share of by application segment in 2023.”

In 2023, the biopharmaceutical production segment accounted for the largest share of by application segment in the global cell culture market. Biopharmaceutical production segment is further categorized into vaccine production, monoclonal antibody production, and other therapeutic protein production. The growing prevalence of infectious diseases is boosting the demand for biopharmaceuticals such as vaccines, monoclonal antibodies, and therapeutic proteins, resulting to promote the growth of biopharmaceutical production in cell culture market.

“The US will continue to dominate the cell culture market during the forecast period of 2024-2029.”

In 2023, the cell culture market in North America was led by the US. As the world's largest biopharmaceutical market with a strong emphasis on research and investment in biopharmaceuticals, the US holds a prominent position. Moreover, the country hosts renowned academic research institutions such as Harvard University, Stanford University, and the Massachusetts Institute of Technology (MIT), renowned for their groundbreaking work in life sciences, including drug discovery and biotechnology, which extensively employ cell culture techniques, thereby fuelling market expansion. Furthermore, increasing investments in tissue engineering and regenerative medicine R&D are contributing to the growth of the cell culture market.

The primary interviews conducted for this report can be categorized as follows:

By Respondent: Supply Side- 70% and Demand Side 30%

By Designation: Managers - 45%, CXO & Directors - 30%, and Executives - 25%

By Region: North America - 40%, Europe -25%, Asia-Pacific -25%, Latin America -5% and Middle East & Africa- 5%

List of Companies Profiled in the Report:

Thermo Fisher Scientific Inc. (US)

Danaher Corporation (US)

Sartorius AG (Germany)

Merck KGaA (Germany)

Corning Incorporated (US)

FUJIFILM Holdings Corporation (Japan)

BD (US)

Eppendorf SE (Germany)

Lonza (Switzerland)

Getinge AB (Sweden)

Agilent Technologies, Inc. (US)

HiMedia Laboratories (India)

Miltenyi Biotec (Germany)

STEMCELL Technologies (Canada)

Solida Biotech GmbH (Germany)

Caisson Labs (US)

PromoCell GmbH (Germany)

InvivoGen (France)

PAN-Biotech (Germany)

Cellexus (Scotland)

Meissner Filtration Products Inc. (US)

Adolf K?hner AG (Switzerland)

Bio-Techne (US)

Advancion Corporation (US)

BioSpherix, Ltd. (US)

Research Coverage:

This research report categorizes the cell culture market by product ((equipment (bioreactors, storage equipment, and other equipment), consumables (sera, media,

Cell Culture Market by Product (Consumables (Media, Sera, Reagents), Vessels (Roller Bottle, Cell Factory, Fla...

reagents, vessels, and accessories)), by application (biopharmaceutical production (vaccine production, monoclonal antibody production, and other therapeutic protein production), diagnostics, tissue engineering & regenerative medicine (cell & gene therapy and other tissue engineering & regenerative medicine applications), drug screening & development, and other applications), by end user (pharmaceutical & biotechnology companies, hospitals & diagnostic laboratories, research & academic institutes, and other end users), and by region (North America, Europe, Asia Pacific, Latin America, Middle East, and Africa). The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the cell culture market. A detailed analysis of the key industry players has been done to provide insights into their business overview, products, solutions, key strategies, collaborations, partnerships, and agreements. New launches, collaborations and acquisitions, and recent developments associated with the cell culture market.

Key Benefits of Buying the Report:

The report will help market leaders/new entrants by providing them with the closest approximations of the revenue numbers for the overall cell culture market and its subsegments. It will also help stakeholders better understand the competitive landscape and gain more insights to better position their business and make suitable go-to-market strategies. This report will enable stakeholders to understand the market's pulse and provide them with information on the key market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

Analysis of key drivers (increasing prevalence of infectious diseases, rising adoption of single-use technologies, and growing strategic alliances for the development of advanced therapy medicine products), restraints (high cost of cell biology research and limitations regarding production of high density cell culture), opportunities (growing opportunities in emerging economies, rising demand for 3D cell culture), and Challenges (ethical concern regarding cell usage) influencing the growth of the market.

Product Development/Innovation: Detailed insights on newly launched products of the cell culture market

Market Development: Comprehensive information about lucrative markets - the

report analyses the market across varied regions.

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the cell culture market

Competitive Assessment: Thermo Fisher Scientific Inc. (US), Danaher Corporation (US), Sartorius AG (Germany), Merck KGaA (Germany), Corning Incorporated (US), FUJIFILM Holdings Corporation (Japan), BD (US), Eppendorf SE (Germany), Lonza (Switzerland), Getinge AB (Sweden), Agilent Technologies, Inc. (US), HiMedia Laboratories (India), Miltenyi Biotec (Germany), STEMCELL Technologies (Canada), Solida Biotech GmbH (Germany), Caisson Labs (US), PromoCell GmbH (Germany), InvivoGen (France), PAN-Biotech (Germany), Cellexus (Scotland), Meissner Filtration Products Inc. (US), Adolf K?hner AG (Switzerland), Bio-Techne (US), Advancion Corporation (US), and BioSpherix, Ltd. (US), among others in the market.

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TABLE 134 GCC COUNTRIES: BUFFERS & CHEMICALS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.2.1.2.4 Cell dissociation reagents

6.2.1.2.4.1 Ability to efficiently and gently detach adherent cells from culture surfaces to boost demand for dissociation reagents

TABLE 135 CELL DISSOCIATION REAGENTS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 136 NORTH AMERICA: CELL DISSOCIATION REAGENTS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 137 EUROPE: CELL DISSOCIATION REAGENTS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 138 ASIA PACIFIC: CELL DISSOCIATION REAGENTS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 139 LATIN AMERICA: CELL DISSOCIATION REAGENTS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 140 MIDDLE EAST: CELL DISSOCIATION REAGENTS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 141 GCC COUNTRIES: CELL DISSOCIATION REAGENTS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.2.1.2.5 Balanced salt solutions

6.2.1.2.5.1 Ability to maintain optimal physiological conditions for cell growth and experimentation to drive segment growth

TABLE 142 BALANCED SALT SOLUTIONS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 143 NORTH AMERICA: BALANCED SALT SOLUTIONS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 144 EUROPE: BALANCED SALT SOLUTIONS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 145 ASIA PACIFIC: BALANCED SALT SOLUTIONS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 146 LATIN AMERICA: BALANCED SALT SOLUTIONS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 147 MIDDLE EAST: BALANCED SALT SOLUTIONS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 148 GCC COUNTRIES: BALANCED SALT SOLUTIONS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.2.1.2.6 Attachment & matrix factors

6.2.1.2.6.1 Rising adoption of 3D cell culture models to support market growth

TABLE 149 ATTACHMENT & MATRIX FACTORS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 150 NORTH AMERICA: ATTACHMENT & MATRIX FACTORS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 151 EUROPE: ATTACHMENT & MATRIX FACTORS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 152 ASIA PACIFIC: ATTACHMENT & MATRIX FACTORS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 153 LATIN AMERICA: ATTACHMENT & MATRIX FACTORS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 154 MIDDLE EAST: ATTACHMENT & MATRIX FACTORS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 155 GCC COUNTRIES: ATTACHMENT & MATRIX FACTORS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.2.1.2.7 Antibiotics/Antimycotics

6.2.1.2.7.1 Risk of contamination to make use of antibiotics/antimycotics essential

TABLE 156 ANTIBIOTICS/ANTIMYCOTICS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 157 NORTH AMERICA: ANTIBIOTICS/ANTIMYCOTICS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 158 EUROPE: ANTIBIOTICS/ANTIMYCOTICS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 159 ASIA PACIFIC: ANTIBIOTICS/ANTIMYCOTICS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 160 LATIN AMERICA: ANTIBIOTICS/ANTIMYCOTICS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 161 MIDDLE EAST: ANTIBIOTICS/ANTIMYCOTICS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 162 GCC COUNTRIES: ANTIBIOTICS/ANTIMYCOTICS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.2.1.2.8 Cryoprotective reagents

6.2.1.2.8.1 Ability to preserve cell viability during freezing and thawing to boost demand

TABLE 163 CRYOPROTECTIVE REAGENTS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 164 NORTH AMERICA: CRYOPROTECTIVE REAGENTS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 165 EUROPE: CRYOPROTECTIVE REAGENTS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 166 ASIA PACIFIC: CRYOPROTECTIVE REAGENTS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 167 LATIN AMERICA: CRYOPROTECTIVE REAGENTS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 168 MIDDLE EAST: CRYOPROTECTIVE REAGENTS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 169 GCC COUNTRIES: CRYOPROTECTIVE REAGENTS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.2.1.2.9 Contamination detection kits

6.2.1.2.9.1 Rapid identification of microbial contaminants to drive usage of

contamination detection kits

TABLE 170 CONTAMINATION DETECTION KITS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 171 NORTH AMERICA: CONTAMINATION DETECTION KITS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 172 EUROPE: CONTAMINATION DETECTION KITS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 173 ASIA PACIFIC: CONTAMINATION DETECTION KITS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 174 LATIN AMERICA: CONTAMINATION DETECTION KITS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 175 MIDDLE EAST: CONTAMINATION DETECTION KITS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 176 GCC COUNTRIES: CONTAMINATION DETECTION KITS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.2.1.2.10 Other reagents

TABLE 177 OTHER REAGENTS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 178 NORTH AMERICA: OTHER REAGENTS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 179 EUROPE: OTHER REAGENTS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 180 ASIA PACIFIC: OTHER REAGENTS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 181 LATIN AMERICA: OTHER REAGENTS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 182 MIDDLE EAST: OTHER REAGENTS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 183 GCC COUNTRIES: OTHER REAGENTS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.2.1.3 Sera

TABLE 184 SERA MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 185 SERA MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 186 NORTH AMERICA: SERA MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 187 EUROPE: SERA MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 188 ASIA PACIFIC: SERA MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 189 LATIN AMERICA: SERA MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 190 MIDDLE EAST: SERA MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 191 GCC COUNTRIES: SERA MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.2.1.3.1 Fetal bovine sera

6.2.1.3.1.1 Fetal bovine sera to hold largest share

TABLE 192 FETAL BOVINE SERA MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 193 NORTH AMERICA: FETAL BOVINE SERA MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 194 EUROPE: FETAL BOVINE SERA MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 195 ASIA PACIFIC: FETAL BOVINE SERA MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 196 LATIN AMERICA: FETAL BOVINE SERA MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 197 MIDDLE EAST: FETAL BOVINE SERA MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 198 GCC COUNTRIES: FETAL BOVINE SERA MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.2.1.3.2 Adult bovine sera

6.2.1.3.2.1 Cost-effectiveness and use as a biochemical reagent in IVD to support adoption

TABLE 199 ADULT BOVINE SERA MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 200 NORTH AMERICA: ADULT BOVINE SERA MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 201 EUROPE: ADULT BOVINE SERA MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 202 ASIA PACIFIC: ADULT BOVINE SERA MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 203 LATIN AMERICA: ADULT BOVINE SERA MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 204 MIDDLE EAST: ADULT BOVINE SERA MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 205 GCC COUNTRIES: ADULT BOVINE SERA MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.2.1.3.3 Other animal sera

TABLE 206 OTHER ANIMAL SERA MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 207 NORTH AMERICA: OTHER ANIMAL SERA MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 208 EUROPE: OTHER ANIMAL SERA MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 209 ASIA PACIFIC: OTHER ANIMAL SERA MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 210 LATIN AMERICA: OTHER ANIMAL SERA MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 211 MIDDLE EAST: OTHER ANIMAL SERA MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 212 GCC COUNTRIES: OTHER ANIMAL SERA MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.2.2 VESSELS

TABLE 213 VESSELS MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 214 VESSELS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 215 NORTH AMERICA: VESSELS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 216 EUROPE: VESSELS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 217 ASIA PACIFIC: VESSELS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 218 LATIN AMERICA: VESSELS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 219 MIDDLE EAST: VESSELS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 220 GCC COUNTRIES: VESSELS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.2.2.1 Cell factory systems/cell stacks

6.2.2.1.1 Efficient and scalable solutions for large-scale expansion to drive end-user adoption

TABLE 221 CELL FACTORY SYSTEMS/CELL STACKS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 222 NORTH AMERICA: CELL FACTORY SYSTEMS/CELL STACKS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 223 EUROPE: CELL FACTORY SYSTEMS/CELL STACKS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 224 ASIA PACIFIC: CELL FACTORY SYSTEMS/CELL STACKS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 225 LATIN AMERICA: CELL FACTORY SYSTEMS/CELL STACKS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 226 MIDDLE EAST: CELL FACTORY SYSTEMS/CELL STACKS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 227 GCC COUNTRIES: CELL FACTORY SYSTEMS/CELL STACKS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.2.2.2 Roller/roux bottles

6.2.2.2.1 Scalability, cost-effectiveness, and ease of handling to support growth

TABLE 228 ROLLER/ROUX BOTTLES MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 229 NORTH AMERICA: ROLLER/ROUX BOTTLES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 230 EUROPE: ROLLER/ROUX BOTTLES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 231 ASIA PACIFIC: ROLLER/ROUX BOTTLES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 232 LATIN AMERICA: ROLLER/ROUX BOTTLES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 233 MIDDLE EAST: ROLLER/ROUX BOTTLES MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 234 GCC COUNTRIES: ROLLER/ROUX BOTTLES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.2.2.3 Flasks

6.2.2.3.1 Advancements in cell culture flasks to boost segment growth

TABLE 235 FLASKS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 236 NORTH AMERICA: FLASKS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 237 EUROPE: FLASKS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 238 ASIA PACIFIC: FLASKS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 239 LATIN AMERICA: FLASKS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 240 MIDDLE EAST: FLASKS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 241 GCC COUNTRIES: FLASKS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.2.2.4 Multiwell plates

6.2.2.4.1 Increased adoption of multiwell plates to drive market

TABLE 242 MULTIWELL PLATES MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 243 NORTH AMERICA: MULTIWELL PLATES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 244 EUROPE: MULTIWELL PLATES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 245 ASIA PACIFIC: MULTIWELL PLATES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 246 LATIN AMERICA: MULTIWELL PLATES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 247 MIDDLE EAST: MULTIWELL PLATES MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 248 GCC COUNTRIES: MULTIWELL PLATES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.2.2.5 Petri dishes

6.2.2.5.1 Ease of use to drive demand

TABLE 249 PETRI DISHES MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 250 NORTH AMERICA: PETRI DISHES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 251 EUROPE: PETRI DISHES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 252 ASIA PACIFIC: PETRI DISHES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 253 LATIN AMERICA: PETRI DISHES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 254 MIDDLE EAST: PETRI DISHES MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 255 GCC COUNTRIES: PETRI DISHES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.2.3 ACCESSORIES

6.2.3.1 Reduced preparation time and equipment performance improvements to drive market

TABLE 256 ACCESSORIES MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 257 NORTH AMERICA: ACCESSORIES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 258 EUROPE: ACCESSORIES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 259 ASIA PACIFIC: ACCESSORIES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 260 LATIN AMERICA: ACCESSORIES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 261 MIDDLE EAST: ACCESSORIES MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 262 GCC COUNTRIES: ACCESSORIES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.3 EQUIPMENT

TABLE 263 EQUIPMENT MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 264 EQUIPMENT MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 265 NORTH AMERICA: EQUIPMENT MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 266 EUROPE: EQUIPMENT MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 267 ASIA PACIFIC: EQUIPMENT MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 268 LATIN AMERICA: EQUIPMENT MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 269 MIDDLE EAST: EQUIPMENT MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 270 GCC COUNTRIES: EQUIPMENT MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.3.1 BIOREACTORS

TABLE 271 BIOREACTORS MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 272 BIOREACTORS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 273 NORTH AMERICA: BIOREACTORS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 274 EUROPE: BIOREACTORS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 275 ASIA PACIFIC: BIOREACTORS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 276 LATIN AMERICA: BIOREACTORS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 277 MIDDLE EAST: BIOREACTORS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 278 GCC COUNTRIES: BIOREACTORS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.3.1.1 Conventional bioreactors

6.3.1.1.1 Utilization in large-scale manufacturing of drugs to drive market

TABLE 279 CONVENTIONAL BIOREACTORS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 280 NORTH AMERICA: CONVENTIONAL BIOREACTORS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 281 EUROPE: CONVENTIONAL BIOREACTORS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 282 ASIA PACIFIC: CONVENTIONAL BIOREACTORS MARKET, BY

COUNTRY, 2022 2029 (USD MILLION)

TABLE 283 LATIN AMERICA: CONVENTIONAL BIOREACTORS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 284 MIDDLE EAST: CONVENTIONAL BIOREACTORS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 285 GCC COUNTRIES: CONVENTIONAL BIOREACTORS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.3.1.2 Single-use bioreactors

6.3.1.2.1 Lower operational costs and increased flexibility to boost demand

TABLE 286 LIST OF COMMERCIALY AVAILABLE SINGLE-USE BIOREACTORS, BY KEY PLAYER

TABLE 287 SINGLE-USE BIOREACTORS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 288 NORTH AMERICA: SINGLE-USE BIOREACTORS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 289 EUROPE: SINGLE-USE BIOREACTORS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 290 ASIA PACIFIC: SINGLE-USE BIOREACTORS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 291 LATIN AMERICA: SINGLE-USE BIOREACTORS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 292 MIDDLE EAST: SINGLE-USE BIOREACTORS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 293 GCC COUNTRIES: SINGLE-USE BIOREACTORS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.3.2 STORAGE EQUIPMENT

TABLE 294 STORAGE EQUIPMENT MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 295 STORAGE EQUIPMENT MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 296 NORTH AMERICA: STORAGE EQUIPMENT MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 297 EUROPE: STORAGE EQUIPMENT MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 298 ASIA PACIFIC: STORAGE EQUIPMENT MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 299 LATIN AMERICA: STORAGE EQUIPMENT MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 300 MIDDLE EAST: STORAGE EQUIPMENT MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 301 GCC COUNTRIES: STORAGE EQUIPMENT MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.3.2.1 Refrigerators & freezers

6.3.2.1.1 Increasing need for storage solutions to propel market

TABLE 302 REFRIGERATORS & FREEZERS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 303 NORTH AMERICA: REFRIGERATORS & FREEZERS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 304 EUROPE: REFRIGERATORS & FREEZERS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 305 ASIA PACIFIC: REFRIGERATORS & FREEZERS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 306 LATIN AMERICA: REFRIGERATORS & FREEZERS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 307 MIDDLE EAST: REFRIGERATORS & FREEZERS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 308 GCC COUNTRIES: REFRIGERATORS & FREEZERS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.3.2.2 Cryostorage systems

6.3.2.2.1 Benefits of long-term preservation of cell cultures to support growth

TABLE 309 CRYOSTORAGE SYSTEMS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 310 NORTH AMERICA: CRYOSTORAGE SYSTEMS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 311 EUROPE: CRYOSTORAGE SYSTEMS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 312 ASIA PACIFIC: CRYOSTORAGE SYSTEMS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 313 LATIN AMERICA: CRYOSTORAGE SYSTEMS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 314 MIDDLE EAST: CRYOSTORAGE SYSTEMS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 315 GCC COUNTRIES: CRYOSTORAGE SYSTEMS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.3.3 OTHER EQUIPMENT

TABLE 316 OTHER EQUIPMENT MARKET, BY TYPE, 2022 2029 (USD MILLION)

TABLE 317 OTHER EQUIPMENT MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 318 NORTH AMERICA: OTHER EQUIPMENT MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 319 EUROPE: OTHER EQUIPMENT MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 320 ASIA PACIFIC: OTHER EQUIPMENT MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 321 LATIN AMERICA: OTHER EQUIPMENT MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 322 MIDDLE EAST: OTHER EQUIPMENT MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 323 GCC COUNTRIES: OTHER EQUIPMENT MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.3.3.1 Filtration systems

6.3.3.1.1 Growing use in bioprocessing industry to boost demand

TABLE 324 LIST OF FILTRATION SYSTEMS, BY KEY PLAYER

TABLE 325 FILTRATION SYSTEMS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 326 NORTH AMERICA: FILTRATION SYSTEMS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 327 EUROPE: FILTRATION SYSTEMS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 328 ASIA PACIFIC: FILTRATION SYSTEMS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 329 LATIN AMERICA: FILTRATION SYSTEMS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 330 MIDDLE EAST: FILTRATION SYSTEMS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 331 GCC COUNTRIES: FILTRATION SYSTEMS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.3.3.2 Cell counters

6.3.3.2.1 Growing adoption of automated cell counters to propel market

TABLE 332 LIST OF COMMERCIALY AVAILABLE CELL COUNTERS, BY KEY PLAYER

TABLE 333 CELL COUNTERS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 334 NORTH AMERICA: CELL COUNTERS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 335 EUROPE: CELL COUNTERS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 336 ASIA PACIFIC: CELL COUNTERS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 337 LATIN AMERICA: CELL COUNTERS MARKET, BY COUNTRY, 2022 2029

(USD MILLION)

TABLE 338 MIDDLE EAST: CELL COUNTERS MARKET, BY REGION, 2022 2029

(USD MILLION)

TABLE 339 GCC COUNTRIES: CELL COUNTERS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.3.3.3 Carbon dioxide incubators

6.3.3.3.1 Increasing focus of research institutes on developing lab-scale incubators to drive market

TABLE 340 CARBON DIOXIDE INCUBATORS OFFERED BY KEY MARKET PLAYERS

TABLE 341 CARBON DIOXIDE INCUBATORS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 342 NORTH AMERICA: CARBON DIOXIDE INCUBATORS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 343 EUROPE: CARBON DIOXIDE INCUBATORS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 344 ASIA PACIFIC: CARBON DIOXIDE INCUBATORS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 345 LATIN AMERICA: CARBON DIOXIDE INCUBATORS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 346 MIDDLE EAST: CARBON DIOXIDE INCUBATORS MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 347 GCC COUNTRIES: CARBON DIOXIDE INCUBATORS MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.3.3.4 Centrifuges

6.3.3.4.1 Increasing demand for bioproduction applications to drive adoption of centrifuges

TABLE 348 CENTRIFUGES OFFERED BY KEY MARKET PLAYERS

TABLE 349 CENTRIFUGES MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 350 NORTH AMERICA: CENTRIFUGES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 351 EUROPE: CENTRIFUGES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 352 ASIA PACIFIC: CENTRIFUGES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 353 LATIN AMERICA: CENTRIFUGES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

TABLE 354 MIDDLE EAST: CENTRIFUGES MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 355 GCC COUNTRIES: CENTRIFUGES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

6.3.3.5 Autoclaves

6.3.3.5.1 Reliance on single-use labware and equipment to affect demand for autoclaves

TABLE 356 AUTOCLAVES MARKET, BY REGION, 2022 2029 (USD MILLION)

TABLE 357 NORTH AMERICA: AUTOCLAVES MARKET, BY COUNTRY, 2022 2029 (USD MILLION)

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*Business Overview, Products/Services/Solutions Offered, MnM View, Key Strengths and Right to Win, Strategic Choices Made, Weaknesses and Competitive Threats, Recent Developments might not be captured in case of unlisted companies

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About

Cell Culture is the process in which cells from microbes, plants, insects or animal are grown in an artificial environment under controlled conditions. Although the conditions under which these cells are cultured vary widely with the type of cells, a regulated chemical environment which includes pH, osmotic pressure, and temperature along with a substrate that provides nutrients, growth factors, hormones, and gases are invariably a part of all cultures.

This report segments the cell culture market into two submarkets, namely, the cell culture equipment market and the cell culture media, sera, and reagents market. The cell culture equipment market consists of five equipment segments, namely, lab equipment, bio-safety cabinets, consumables, storage equipment, and sterilization equipment. On the other hand, the cell culture media, sera, and reagents market consists of six segments, namely, serum, media, lab reagents, contamination detection kits, cryoprotective agents, and other reagents. The report segments the cell culture market on the basis of applications and geographies. The application segment included in this report are biopharmaceutical production, tissue culture and engineering, vaccine production, drug screening and development, gene therapy, toxicity testing, cancer research, and other applications. The geographic segments included in this report are North America, Europe, APAC, and Rest of the World (RoW).

Growth in the biopharmaceuticals market is a major driver for the cell culture market. It is the most integral part of biopharmaceutical development, bio-processing, and manufacturing. As the development of vaccines is another important growth driver for this market, influenza vaccines were previously developed with the help of egg-based technology. However, due its labor-intensive approach it has been replaced with cell culture. A growth in this market will subsequently drive the market for cell culture. The cell culture market is expected to witness moderate growth in the next five years.

The market is also driven by the use of animal-derived component-free media and reagents and the growing demand for advanced biologics and biosimilars from the biopharmaceutical industry. The increasing demand for automated cell culture processes and systems will also be an impetus for growth. The market is also likely to notice a shift towards contract manufacturing and research.

The serum-free media market is expected to be the fastest growing segment. Adoption

of serum-free, chemically defined, and specialty media is expected to be high being an impetus of growth for this segment. The bioreactor and culture system segments form the most attractive markets in the consumables segment, in terms of revenue as well as CAGR.

Market players are making significant investments in Asia due to a favorable scenario for stem cell research. The cell culture market is fairly consolidated with major players being Becton, Dickinson and Company (U.S.), Corning (U.S.), Eppendorf (Germany), General Electric (U.S.), Lonza (Switzerland), Merck (Germany), Promocell (Germany), Sartorius (Germany), Sigma-Aldrich Corporation (U.S.), and Thermo Fisher Scientific (U.S.).

I would like to order

Product name: Cell Culture Market by Product (Consumables (Media, Sera, Reagents), Vessels (Roller Bottle, Cell Factory, Flask), Equipment (SU Bioreactor, Storage, Incubators, Filtration)), Application (mAbs, Vaccines, Regenerative Medicine) - Global Forecast to 2029

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