

Hollow Fiber Filtration Market by Material (Polymer (PES, PVDF), Ceramic), Technique (Microfiltration, Ultrafiltration), Application (Harvest & Clarification, Concentration, Diafiltration), End Users (Pharma, Biotech, CRO, CMO) - Global Forecast to 2026

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Abstracts

The global hollow fiber filtration market is projected to reach USD 597million by 2026 from USD 303 million in 2021, at a CAGR of 14.5% during the forecast period. The growth of the global hollow fiber filtration market is driven by factors such as the rising preference for continuous manufacturing, increasing use of single use technologies, and the rising biopharmaceutical industry. In addition, emerging economies, and increased investment cell-based research are expected to provide significant growth opportunities for players in the hollow fiber filtration market.

“By material segment, the polymeric segment accounted for the largest share of the Hollow fiber filtrationmarket”

Based on material, the hollow fiber filtration market is segmented into polymeric and ceramic filters. The polymeric segment is further sub segmented into polysulfide/polyethersulfone (PS/PES), polyvinylidene fluoride (PVDF), and other polymeric materials (cellulose & cellulose acetate, mixed cellulose ester, and polypropylene). In 2020, the polymeric segment accounted for the largest market share of the hollow fiber filtration market. The large share of this segment is primarily attributed to the hydrophilic nature of PES/PS, low protein-binding properties, and its wide range of applications.

“By application, the continuous cell perfusion segmentaccounted for the largest share of the Hollow fiber filtration market”

Based on application type, the hollow fiber filtration market is segmented into continuous cell perfusion, harvest and clarification, and concentration and diafiltration. In 2020, continuous cell perfusion accounted for the largest market share due to the advantages of hollow fibers in continuous cell perfusion, such as enabling efficient cell separation (with low shear) and allowing robust large-scale manufacturing.

“By technique, the microfiltration segment accounted for the largest market share of the Hollow fiber filtration market”

Based on application, the hollow fiber filtration market is segmented into microfiltration and ultrafiltration. In 2020, the microfiltration segment accounted for the largest share of the global hollow fiber filtration market due to the availability of a wide range of pore sizes which have vast applications such as separation of a virus, bacteria, aerosols, and innumerable macromolecules from fluids, without the requirement of autoclaving a procedure.

“By end users, the pharmaceutical and biotechnology manufacturers accounted for the largest market share of the Hollow fiber filtration market”

Based on end users, the hollow fiber filtration market is segmented into pharmaceutical and biotechnology manufacturers, contract research organizations (CROs) & contract manufacturing organizations (CMOs), and other end users. In 2020, the pharmaceutical and biotechnology manufacturers segment accounted for the largest share of the hollow fiber filtration market. The large share of this segment is attributed to the increasing demand for hollow fiber filters in ultrafiltration, diafiltration, and microfiltration processes in biopharmaceutical manufacturing and the growing adoption of continuous manufacturing processes (due to advantages such as improved manufacturing process efficiency and flexibility).

“Asia Pacific: The fastest-growing region in the Hollow fiber filtration market.”

The Asia Pacific market is projected to witness the highest growth rate during the forecast period, primarily due to innovation, a giant talent pool of scientists, low labor, and manufacturing costs. The region has also witnessed mass production because of technology and a rise in continuous manufacturing instead of batch production in the previous era.

Asia Pacific region is also a lucrative market for foreign investors, with key market

players having their presence in the region. Over the last decade, CMOs in the Asia Pacific region have impacted the global pharmaceutical manufacturing market. Several small and medium-scale CMOs set up in APAC have obtained US FDA approval for their operations and completed GMP certifications, thus driving the region's hollow fiber filtration market.

“North America accounted for the largest share of the Hollow fiber filtration market in 2020”

North America accounted for the largest share of the hollow fiber filtration market in 2020. The large share of this region can be attributed to the companies in North America mainly focusing on new products such as perfusion systems, convenience, and cost-efficiency of hollow fiber filters and the rising demand for filtration systems for the biopharmaceuticals industry.

Breakdown of primaries

The study contains insights from various industry experts, ranging from component suppliers to Tier 1 companies and OEMs. The break-up of the primaries is as follows:

By Respondent— Supply Side- 70%, Demand Side-30%

By Designation— CXOs and Directors- 30%, Executives - 25%, Managers - 45%

By Region— North America -40%, Europe - 25%, APAC – 20%, LATAM- 10%, MEA- 5%

The Hollow fiber filtration market is dominated by a few globally established players such as Repligen Corporation (US), Danaher (US), Asahi Kasei Corporation (Japan), Parker-Hannifin Corp (US), Sartorius Stedim Biotech S.A (France), TOYOBO CO., LTD(Japan), Cantel Medical (US), Kuraray Co., Ltd. (Japan), Koch Industries Inc. (US), MANN+HUMMEL Holding GmbH (Germany), CoorsTek, Inc. (US), Alpha Plan GmbH (Germany), Antylia Scientific (Germany), Meissner Filtration Product, Inc (US), MMS Membrane System (Switzerland), BiOZEEN Pvt. Ltd. (India), Biotree (India), and APAH technologies (India).

Research Coverage:

The report segments the hollow fiber filtration market based on region (Asia Pacific, Europe, North America, Latin America, and Middle East and Africa), material (polymeric and ceramic), application (continuous cell perfusion, harvest and clarification, concentration and diafiltration), technique (microfiltration and ultrafiltration), and end users (pharmaceutical and biotechnology manufacturing companies, contract research organization and contract manufacturing organization, and other end users.). The report also provides a comprehensive review of market drivers, opportunities, challenges, and trends in the hollow fiber filtration market.

Key Benefits of Buying the Report:

The report will help the leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall market and the sub-segments. This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the hollow fiber filtration market and provides them information on key market drivers, opportunities, and challenges.

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