

Single use Bioprocessing Market by Product (Media Bags and containers, Bioreactors, Mixers, Assemblies), Application (Cell Culture, Mixing, Storage, Filtration, Purification), End User (Biopharma Companies, CROs, CMOs) - Global Forecast 2026

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Abstracts

The global single-use bioprocessing market is expected to reach USD 20.8 billion by 2026 from USD 8.2 billion in 2021, at a CAGR of 20.5% during the forecast period. Single-use bioprocessing is a rapidly evolving technology used to develop disposable bioprocessing equipment and accessories to manufacturing biopharmaceutical molecules such as recombinant proteins, monoclonal antibodies, vaccines, and stem cells. Bioprocess utilizes living cells or their components such as enzymes, bacteria, and others to obtain preferred products. The central idea behind using single-use bioprocessing technology in the bioprocess is to decrease the cost associated with complicated steps such as cleaning, sterilization, and maintenance of steel-based bioreactor systems.

“The single-use media bags and containers segment accounted for the highest growth rate in the single use bioprocessing market, by product, during the forecast period”

In 2020, the single-use media bags and containers segment accounted for the largest share of the single use bioprocessing market, mainly because they provide a single-use disposable alternative to traditional glass and rigid plastic carboys in a large variety of bioprocess applications. They enhance process reliability as they reduce the risk of cross-contamination from batch to batch and from product to product. They also eliminate the time and expense of clean-in-place (CIP) & sterilization-in-place (SIP) operations, thus optimizing capacity utilization. The expanded application of single-use bags across biomanufacturing processes drives the market for single-use media bags.

“Filtration segment accounted for the largest share of the application segment”

In 2020, the filtration application accounted for the largest share. A single-use capsule filter, for instance, serves as an effective substitute for stainless steel housings that require the installation of filter elements. Considering that a fully integrated, single-use system, including the filter, bag, tubing, and other components, is manufactured and sterilized as one eliminates the contamination risks associated with aseptic connections during coupling. Single-use filtration systems also ensure that operators do not come in contact with cleaning solutions, cytotoxic fluids, or buffers with extreme pH. The single-use nature of this type of filtration system eliminates the need for system maintenance, cleaning and cleaning validation and avoids any possibility of contamination from product to product or batch to batch.

“Asia Pacific: The fastest-growing region in the single use bioprocessing market”

The single use bioprocessing market is segmented into North America, Europe, Asia Pacific, Latin America (LATAM) and Middle East and Africa (MEA). Significant investments by key market players, increasing government support, and developing R&D infrastructure are the major factors fueling the growth of the single use bioprocessing market in the Asia Pacific region.

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

By Respondent: Supply Side- 80% and Demand Side 20%

By Designation: C-level - 25%, D-level - 20%, and Others - 55%

By Region: North America -50%, Europe -20%, Asia-Pacific -20%, RoW -10%

Lists of Companies Profiled in the Report:

Sartorius Stedim Biotech S. A. (France)

Danaher Corporation (US)

Thermo Fisher Scientific (US)

Merck KGaA (Germany)

Getinge AB (Sweden)

Eppendorf AG (Germany)

Corning (US)

Entegris (US)

Avantor (US)

CESCO Bioengineering Co. Ltd. (Taiwan)

Cellexus (UK)

PBS Biotech, Inc. (US)

Distek, Inc. (US)

ABEC, Inc. (US)

Able Corporation & Biott Corporation (Japan)

G&G Technologies (US)

Solida Biotech GmbH (Germany)

Satake Chemical Equipment Mfg., Ltd. (Japan)

Stobbe Pharma GmbH (Switzerland)

Celltainer Biotech (Netherlands)

Meissner Filtration products, Inc. (US)

bbi-biotech GmbH (Germany)

Pierre Guerin (France)

Kuhner AG (Switzerland)

OmniBRx Biotechnologies (India).

Research Coverage:

This report provides a detailed picture of the single use bioprocessing market. It aims at estimating the size and future growth potential of the market across different segments such as the product, application, end user and region. The report also includes an in-depth competitive analysis of the key market players along with their company profiles, recent developments and key market strategies.

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 single use bioprocessing 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, challenges, trends, and opportunities.

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*Details on Business overview, Products offered, Recent Developments, SWOT Analysis, MNM view might not be captured in case of unlisted companies.

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About

Single-use bioprocessing technology is a rapidly evolving technology that is used in the development of disposable bio-processing equipment and accessories to manufacture biopharmaceutical products. The global single-use bioreactors market is expected to reach \$XX million by 2019 from \$XX million in 2014, at a CAGR of XX% from 2014 to 2019.

Some of the major factors driving the growth of the single-use bioreactors market (SUBs) are improved returns on investment for small companies and startups and reduced complexity of automation. However, limitations related to scaling, issues regarding leachables and extractables, and difficulties in meeting the good manufacturing practice (GMP) standards are some of the factors restraining the growth of this market.

In this report, the SUBs market is broadly segmented into technology, type of cells, molecule type, end user, and geography.

The single-use bioprocessing technology, which emerged in the 1970s with the use of vials and pipettes, has transformed significantly over the last decade. The single-use bioprocessing technology is a rapidly evolving technology that is used in the development of disposable bio-processing equipment and accessories to manufacture biopharmaceutical products. This disposable equipment mainly helps to reduce the costs associated with the usage of complex steps such as sterilization, cleaning, and maintenance of steel-based bioreactor systems and accessories. The first single-use bioreactors—Wave rocker platforms (now from GE Healthcare)—entered the market about 10 years ago. Currently, for bioreactors, the single-use technology is mainly used for a wide range of processes, from upscale bioprocessing to final formulation and filling.

Factors such as improved returns on investment for small companies and startups, reduced complexity in automation, and ease in cultivation of marine organisms like algae are the key drivers for the growth of the global SUBs market. On the other hand, extractability and leachability issues regarding disposable components like plastic bags (used in bioreactors), breakage of bags, and environmental and economic concerns are the major factors that are restraining the growth of the SUBs market.

Wave-induced motion SUBs were launched in early 2000s. With successful application

over the years, they are one of the widely used SUBs. These SUBs are based on the rocking motion that is used for mixing the contents of the bioreactor. This is one of the oldest agitation technologies used in SUBs. This technology has witnessed highest adoption as it requires lower investment costs and simpler and cheaper validation as compared to stirred tank bioreactors. Moreover, wave-induced motion SUBs conduct bubble-free surface aeration that result in reduced foaming and flotation compared to stirred tank bioreactors. Foaming and flotation are problems normally encountered while culturing cells, especially plant cells such as algae, which causes reduction in the working volume of bioreactors.

In wave-induced technology, both mass and energy transfer takes place; this contributes to final product and process efficiency. However, the difficulty in cultivation of aerobic microbes that require high oxygen transfer rate is the major disadvantage of wave-induced motion SUBs.

The wave-induced motion SUBs market is expected to reach \$XX million by 2019 from \$XX million in 2014, at a CAGR of XX% from 2014 to 2019.

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