

# **Biomanufacturing Viral Detection and Quantifications Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Offering Type (Consumables, Instruments, Services), By Technology (PCR, ELISA, Flow Cytometry, Plaque Assay, Others), By Application (Blood and Blood Products Manufacturing, Vaccines and Therapeutics Manufacturing, Cellular and Gene Therapy Products Manufacturing, Stem Cell Products Manufacturing, Tissue and Tissue Products Manufacturing), By End-User (Life Science Companies, Testing Laboratories, CROs, CDMOs), By Region, Competition**

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## **Abstracts**

The Global Biomanufacturing Viral Detection and Quantifications Market recorded a value of USD 480.24 Million in 2022, with a projected strong growth trajectory throughout the forecast period, showcasing a Compound Annual Growth Rate (CAGR) of 8.43% until 2028 and expected to be valued at USD 771.73 Million in 2028. Biomanufacturing Viral Detection and Quantifications involve the utilization of biotechnological methods and techniques to develop tools, reagents, and systems used in identifying and measuring viruses. This field amalgamates principles from biotechnology, molecular biology, and engineering to establish efficient and reliable methods for detecting viruses in diverse samples, including clinical, environmental, and research settings. The process encompasses large-scale production of essential reagents such as antibodies, probes, primers, and enzymes, vital for virus detection and

quantification through techniques like Polymerase Chain Reaction (PCR), Enzyme-Linked Immunosorbent Assay (ELISA), and various molecular biology assays. The domain also plays a pivotal role in producing diagnostic kits used in clinical laboratories and healthcare facilities for identifying specific viral infections. These kits encompass all the necessary components to conduct tests and interpret results. Furthermore, the arena contributes to the development of advanced sensor platforms, biosensors, and microfluidic devices capable of real-time or high-throughput virus detection. These platforms often include molecular recognition elements such as antibodies or nucleic acid probes to capture and detect viral particles. Biomanufacturing for viral detection and quantification encompasses several key areas including Molecular Diagnostics, Immunodiagnostics, Biosensors and Microfluidics, and Cell-Based Assays.

### Key Market Drivers

**Increasing Incidence of Viral Diseases Drive the Market Growth:** The rising prevalence of viral diseases is a significant driver propelling the growth of the global biomanufacturing viral detection and quantification market. The World Health Organization (WHO) estimates that approximately half of the global population is currently at risk of contracting dengue, with an annual infection rate of 100–400 million. As viral diseases become more widespread, early detection and diagnosis become crucial for timely medical interventions. Bio manufactured viral detection tools, such as diagnostic kits and assays, provide healthcare professionals with accurate and rapid means to detect viruses in patient samples. This facilitates swift treatment and containment, which aids in reducing the spread of infections and enhancing patient outcomes. The increase in viral diseases underscores the importance of robust surveillance and epidemiological monitoring. Bio manufactured viral detection products contribute to these efforts by enabling the tracking of viral outbreaks, understanding disease patterns, and evaluating control measures' effectiveness. This information is vital for informed decision-making by public health agencies, governments, and healthcare providers.

**Advancement In Diagnostic Technology Propels the Market Growth:** Technological advancements in diagnostics play a pivotal role in driving the global biomanufacturing viral detection and quantification market. These innovations enhance the accuracy, speed, sensitivity, and scalability of viral detection methods, leading to broader applications and increased demand for bio manufactured viral detection and quantification products. New diagnostic technologies leverage innovative molecular and immunological techniques to achieve higher sensitivity and specificity in detecting viral

pathogens. Biomanufacturing supports the production of highly specific reagents, such as antibodies and probes, essential for precise viral detection. Microfluidics, miniaturization, and sensor technologies advancements enable the development of portable and rapid Point-of-Care (POC) diagnostic devices. These devices facilitate on-site virus detection, reducing the need for sample transportation and enabling real-time decision-making. Biomanufacturing contributes to the production of components for POC tests. Modern diagnostic technologies enable the simultaneous detection of multiple viral targets in a single assay. This multiplexing capability improves efficiency, reduces testing time, and conserves sample volume. Biomanufacturing supports the creation of multiplex assays and reagent panels. Quantitative techniques like Digital PCR and droplet digital PCR (ddPCR) provide accurate measurements of viral load. Bio manufactured standards and controls are pivotal for establishing calibration curves and ensuring accurate quantification. Automation, robotics, and high-throughput platforms enhance the ability to process a large number of samples efficiently. Bio manufactured reagents and assay components facilitate scaling up viral detection workflows for screening purposes. Nanotechnology-based diagnostic platforms offer high sensitivity and rapid detection capabilities. Biomanufacturing contributes to the production of nano sensors and nanoparticles used in viral detection. Next-Generation Sequencing (NGS) technologies enable comprehensive analysis of viral genomes, providing insights into viral diversity, evolution, and transmission. Biomanufacturing supports the preparation of NGS libraries and the production of sequencing reagents.

The Pandemic Preparedness and Response Drives the Market Growth: Pandemic preparedness and response significantly drive the global biomanufacturing viral detection and quantification market. Lessons learned from previous pandemics and ongoing outbreaks emphasize the importance of robust viral detection capabilities. High-profile pandemics such as H1N1 influenza and the COVID-19 pandemic underscore the need for effective viral detection tools to identify and control outbreaks. This awareness results in increased investment in biomanufacturing infrastructure to develop and produce diagnostic reagents, kits, and assays. During pandemics, rapid and accurate diagnostic tests are urgently required to identify infected individuals. Biomanufacturing facilitates the swift development, validation, and production of diagnostic tools for timely screening and surveillance, enabling early case identification and containment. The establishment of emergency response systems and infrastructure is crucial for pandemic preparedness. Biomanufacturing plays a pivotal role by supplying components for diagnostic tests such as viral antigens, antibodies, and molecular probes. Collaborative efforts between countries, research institutions, diagnostic manufacturers, and healthcare providers are essential to pandemic response. Biomanufacturers contribute by providing viral detection components and expertise,

fostering innovation and knowledge sharing. Pandemics accelerate research and development to enhance diagnostic technologies. Biomanufacturing supports the production of reagents and materials for novel diagnostic methods, enhancing the sensitivity, specificity, and speed of viral detection.

### Key Market Challenges

**Rapidly Evolving Viruses:** The swift evolution of viruses presents significant challenges to the global biomanufacturing viral detection and quantification market. Viral mutations can alter the genetic sequences targeted by detection assays. If a mutation occurs in a region crucial for assay detection, it can result in false negatives, where the assay fails to detect the virus despite its presence. Continuous adaptation of assays is necessary to account for emerging viral variants. Mutations can affect the binding affinity of detection reagents, such as antibodies and primers, potentially reducing assay sensitivity or specificity. Biomanufacturers must continuously adjust reagents to maintain optimal performance against evolving viral strains.

**Complex Sample Matrices:** Complex sample matrices pose a significant challenge in the global biomanufacturing viral detection and quantification market. Complex sample matrices refer to the diverse mixture of substances found in clinical, environmental, or other samples tested for viral presence. These substances can interfere with viral detection methods and impact result accuracy. Components in complex samples, such as blood, saliva, or environmental samples, can interact with detection reagents, antibodies, or primers, leading to false positives or negatives. Substances like proteins, lipids, and inhibitors can hinder the binding of detection molecules to viral targets. Complex matrices can dilute viral targets or lower their concentration, making detection more difficult. This can reduce assay sensitivity and result in missed infections or inaccurate quantification.

**High Research and Development Costs:** High research and development (R&D) costs represent a significant challenge in the global biomanufacturing viral detection and quantification market. Developing, optimizing, and validating

new viral detection methods and products can incur substantial expenses. The costs can strain the financial resources of biomanufacturers, particularly smaller companies and startups. Limited funds may hinder their ability to invest in innovative research and product development. High R&D costs can act as entry barriers for new market players, limiting competition and potentially slowing innovation. This can lead to a lack of diverse and cutting-edge viral detection solutions. Lengthy and expensive R&D processes can

delay the introduction of new products to the market. Delays could impact the availability of timely and up-to-date viral detection tools during outbreaks or emerging viral threats. Rigorous validation and testing of new viral detection methods are essential for accuracy and reliability, contributing to higher R&D costs. This is particularly critical in the context of complex sample matrices and rapidly evolving viruses. Developing high-quality reagents and materials suitable for viral detection methods requires investments in research, manufacturing, and quality control.

## Key Market Trends

**Emerging Infectious Diseases Preparedness:** Preparedness for emerging infectious diseases (EIDs) is a significant trend in the global biomanufacturing viral detection and quantification market. This trend reflects the growing recognition of the need to be well-equipped to rapidly respond to new and unexpected infectious disease outbreaks. EID preparedness drives the development of rapid and accurate viral detection tests that can be quickly deployed during outbreaks. Biomanufacturers focus on creating diagnostic assays that can detect new pathogens or variants with high sensitivity and specificity. Responding to EIDs requires adaptable manufacturing capabilities to swiftly produce reagents, kits, and assays for emerging pathogens. This may involve flexible production processes and scalable manufacturing facilities. Rigorous and expedited validation of new viral detection assays becomes crucial during EID outbreaks. Biomanufacturers need to validate and ensure assay performance against new viral strains to maintain reliability. Collaboration between biomanufacturing companies, research institutions, public health agencies, and governments accelerates the development and distribution of effective viral detection solutions. Regulatory authorities may expedite the approval process for new viral detection products during EID outbreaks to facilitate rapid deployment. Biomanufacturers need to closely collaborate with regulatory bodies. Biomanufactured viral detection products play a critical role in global surveillance efforts to monitor emerging pathogen spread and impact. Early detection and monitoring are essential for effective outbreak response. These tools are vital for assessing vaccine efficacy during EID outbreaks, aiding in tracking pathogen prevalence and monitoring vaccination campaign impact.

## Segmental Insights

**Offering Type Insights:** In 2022, the Consumables Segment dominated the Biomanufacturing Viral Detection and Quantifications market and is expected to continue its expansion in the years ahead. Consumables are essential components of viral detection workflows, requiring regular replenishment due to usage. This results in

repeat purchases, providing a steady revenue stream for biomanufacturing companies. Viral detection and quantification assays are performed routinely in clinical laboratories, research institutions, and public health agencies, leading to consistent demand for testing. Different viral targets, sample types, and assay formats necessitate customized or specialized consumables, offering biomanufacturers an array of products to meet specific testing requirements. High-quality consumables are crucial for accurate and reliable viral detection, subjected to rigorous quality control and validation to ensure consistent performance. The segment is projected to experience the highest Compound Annual Growth Rate (CAGR) from 2023 to 2030.

**Technology Insights:** In 2022, the PCR (Polymerase Chain Reaction) Technology Segment dominated the Biomanufacturing Viral Detection and Quantifications market and is anticipated to continue its growth in the foreseeable future. PCR is renowned for its high sensitivity and specificity, making it ideal for accurately detecting even low viral loads, especially in the early stages of an outbreak. PCR is applicable for both qualitative (presence/absence) and quantitative (viral load) analysis of viral genetic material. The quantitative data aids in disease monitoring, assessing treatment efficacy, and research applications. PCR can target specific viral genes or regions, allowing customization for various viral targets. This versatility makes it suitable for detecting a wide array of viral pathogens. Variants such as Real-Time PCR (qPCR) provide rapid results, often within hours, essential for swift clinical decision-making and outbreak response. Multiplex PCR enables simultaneous detection of multiple viral targets in a single reaction, enhancing efficiency and conserving sample volume, crucial for efficient screening and surveillance. Standardized PCR assays across laboratories ensure consistent and comparable results, critical for accurate disease monitoring and research collaboration. PCR technology is well-established and widely accepted in clinical settings, with numerous assays receiving regulatory approvals for diagnostic use.

**Application Insights:** In 2022, the Blood and Blood Products Manufacturing Segment dominated the Biomanufacturing Viral Detection and Quantifications market and is projected to continue its growth trajectory. Blood and blood products are integral components of healthcare systems, and ensuring their safety from viral contamination is of paramount importance. Viral detection assays are used to screen blood donations for infectious viruses like HIV, hepatitis B and C, and human T-cell lymphotropic virus (HTLV). This is crucial in preventing virus transmission through blood transfusions. Blood plasma is utilized for producing various plasma-derived products, including clotting factors and immunoglobulins, underscoring the importance of viral detection in ensuring contamination-free plasma donations.

**End-User Insights:** In 2022, Clinical Laboratories and Hospitals dominated the Biomanufacturing Viral Detection and Quantifications market and are predicted to continue their expansion. Clinical laboratories and hospitals are primary users of viral detection and quantification technologies for diagnostic purposes. They conduct routine viral infection testing to support patient care and treatment decisions. Biopharmaceutical companies employ viral detection methods across various drug development stages, including research, quality control, and production of biologics like vaccines and monoclonal antibodies. Academic and research institutions leverage viral detection and quantification technologies for basic research, epidemiological studies, and new diagnostic method development.

**Regional Insights:** The Asia-Pacific region emerges as a leader in the Global Biomanufacturing Viral Detection and Quantifications Market. With the world's largest and fastest-growing population, the Asia-Pacific region witnesses increasing demand for healthcare services, including biomanufacturing viral detection and quantification. The region also experiences a high prevalence of viral diseases such as HIV, hepatitis B, and hepatitis C, driving the need for viral detection and quantification tests to diagnose and manage these diseases.

**In Conclusion:** The Global Biomanufacturing Viral Detection and Quantifications Market presents significant growth potential driven by the increasing incidence of viral diseases, advancements in diagnostic technology, and the imperative for pandemic preparedness and response. Challenges such as rapidly evolving viruses, complex sample matrices, and high research and development costs need to be navigated. Key market trends include the emphasis on emerging infectious diseases preparedness. Segments like offering types, technology, applications, and end-users showcase varied dynamics, with consumables, PCR technology, blood and blood product manufacturing, and clinical laboratories and hospitals playing pivotal roles. Moreover, the Asia-Pacific region emerges as a frontrunner in the market, driven by its population size and healthcare demands. These insights underscore the significant opportunities and challenges within the global biomanufacturing viral detection and quantification landscape.

### Key Market Players

Danaher Corporation

Merck KGaA

New England Biolabs

TAKARA HOLDINGS INC.

Thermo Fisher Scientific Inc.

Agilent Technologies, Inc.

Sartorius AG

Charles River Laboratories

Bio-Rad Laboratories, Inc.

PerkinElmer, Inc

#### Report Scope:

In this report, the Global Biomanufacturing Viral Detection and Quantifications Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Biomanufacturing Viral Detection and Quantifications Market, By Offering Type:

Consumables

Instruments

Services

Biomanufacturing Viral Detection and Quantifications Market, By Technology:

PCR

ELISA

Flow Cytometry

Plaque Assay



Others

Biomanufacturing Viral Detection and Quantifications Market, By Application:

Blood and Blood Products Manufacturing

Vaccines and Therapeutics Manufacturing

Cellular and Gene Therapy Products Manufacturing

Stem Cell Products Manufacturing

Tissue and Tissue Products Manufacturing

Biomanufacturing Viral Detection and Quantifications Market, By End User:

Life Science Companies

Testing Laboratories

CROs and CDMOs

Global Biomanufacturing Viral Detection and Quantifications Market, By region:

North America

United States

Canada

Mexico

Asia-Pacific

China

India

South Korea

Australia

Japan

Europe

Germany

France

United Kingdom

Spain

Italy

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Biomanufacturing Viral Detection and Quantifications Market.

*Biomanufacturing Viral Detection and Quantifications Market - Global Industry Size, Share, Trends, Opportunity...*

### Available Customizations:

Global Biomanufacturing Viral Detection and Quantifications Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

#### Company Information

Detailed analysis and profiling of additional market players (up to five).

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## I would like to order

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