

Preparative and Process Chromatography Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Product (Process Chromatography, Preparative Chromatography), By Type (Liquid Chromatography, Gas Chromatography, Thin Layer Chromatography, Paper Chromatography, Gel-permeation Chromatography, Hydrophobic Interaction Chromatography), By End-use (Food, Nutraceutical, Others), By Region, By Competition

<https://marketpublishers.com/r/PF82BE065883EN.html>

Date: October 2023

Pages: 190

Price: US\$ 4,900.00 (Single User License)

ID: PF82BE065883EN

Abstracts

The Global Preparative and Process Chromatography Market was valued at USD 8.91 Million in 2022 and is expected to experience robust growth during the forecast period, with a Compound Annual Growth Rate (CAGR) of 7.18% and expected to reach USD 13.47 Billion through 2028. Chromatography is a process used to separate constituents or solutes within a mixture based on their relative quantities dispersed between a moving fluid stream (mobile phase) and a stationary phase. Preparative chromatography is employed to separate components within complex mixtures. In the pharmaceutical sector, this technique is vital for eliminating contaminants from molecules, making them suitable for various purposes, including clinical use for active medicinal components. Process chromatography serves as an analytical method for online separation and quantification of mixture components during chemical processes. This technique is often automated, continuously taking samples, separating chemical constituents using adsorption or partitioning columns, and quantifying concentrations using detectors.

Key Market Drivers

Increasing Demand for Biopharmaceuticals

The growing demand for biopharmaceuticals significantly impacts the global preparative and process chromatography market. These chromatography techniques are crucial for purifying and separating biomolecules, including biopharmaceuticals like proteins, antibodies, vaccines, and complex molecules. Biopharmaceuticals, such as monoclonal antibodies and gene therapies, are gaining prominence for their efficacy in treating various diseases. With the biopharmaceutical industry expanding, efficient purification and separation techniques like preparative and process chromatography are essential to ensure high-quality production. Regulatory agencies like the FDA and EMA impose strict quality standards on biopharmaceutical products, requiring robust purification processes to guarantee product safety and effectiveness. These chromatography systems play a key role in meeting regulatory demands by providing precise purification.

Elevated Food and Beverage Quality Standards

Increasing standards for food and beverage quality have a significant impact on the preparative and process chromatography market. Regulatory bodies worldwide enforce strict quality and safety standards for these products. Chromatography techniques are employed to detect contaminants, additives, pesticides, mycotoxins, and other harmful substances. Ensuring compliance with these regulations drives the adoption of advanced chromatography methods. Food and beverage manufacturers strive for consistent quality and minimal batch-to-batch variations. Chromatography allows accurate identification and quantification of compounds in complex matrices, facilitating quality control and consistency.

Growing Research and Development Activities

Rising research and development activities influence the global preparative and process chromatography market. These techniques play a vital role in various industries' R&D processes. In pharmaceuticals, chromatography is essential for isolating and purifying potential drug compounds during early drug discovery. Biotechnology R&D involves developing novel biomolecules, biopharmaceuticals, and diagnostics. Chromatography aids in protein purification and analysis of complex biological samples. The food and beverage industry employs chromatography for analyzing flavor compounds, nutritional components, additives, and contaminants. Environmental R&D uses chromatography to monitor pollutants. Genomic and proteomic studies involve analyzing DNA, RNA, and proteins.

Key Market Challenges

Complexity of Method Development

Developing effective chromatography methods requires optimizing various parameters, which can be time-consuming and resource-intensive. The trial-and-error approach to method development can lead to increased consumable usage, longer development timelines, and higher costs. Successful method development requires expertise in chromatography principles and the specific requirements of target compounds. Customizing methods for complex samples demands specialized knowledge.

Competition and Market Fragmentation

Intense competition encourages innovation and product diversification. However, excessive market fragmentation can confuse customers and hinder growth. Redundant R&D efforts and conflicting messages can lead to inefficiency. New entrants may struggle to differentiate themselves. Customer uncertainty can delay decision-making.

Key Market Trends

Advancements in Column Technologies

Innovations in column packing materials and designs lead to better separation efficiency and scalability. Enhanced column chemistry allows for columns with improved selectivity for specific compounds, particularly beneficial in complex samples. Columns designed for high-throughput applications enable rapid analysis and purification, essential for industries with high sample volumes.

Advanced Data Analytics

Data analytics enable real-time monitoring and analysis of chromatography processes. They facilitate process optimization, quality control, and proactive equipment maintenance. Data-driven insights aid in decision-making, process improvement, and ensuring compliance with regulatory standards.

Segmental Insights

Type Insights

Liquid chromatography is anticipated to experience substantial growth due to its widespread application across industries. Liquid chromatography plays a critical role in maintaining product quality during production, offering high-resolution separation for purifying complex mixtures. Ongoing advancements in column and resin technologies improve system efficiency and performance.

End Use Insights

The pharmaceutical sector dominates the market due to chromatography's integral role in drug discovery, development, and production. Chromatography ensures the quality of active pharmaceutical ingredients, intermediates, and final drug products, supporting regulatory compliance and consistent quality.

Regional Insights

North America is a dominant force in the market, with a strong biopharmaceutical industry and academic research infrastructure. The region's demand for advanced chromatography techniques supports developments in biopharmaceuticals, personalized medicine, and innovative therapies.

Key Market Players

GE Healthcare.

Danaher Corporation

Merck KGaA

Bio-Rad Laboratories Inc.

Thermo Fisher Scientific Inc.

Shimadzu Corporation

Agilent Technologies

Waters Corporation

Novasep Holding S.A.S

Sartorius AG.

Report Scope:

In this report, the Global Preparative and Process Chromatography Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Preparative and Process Chromatography Market, By Product:

Process Chromatography

Preparative Chromatography

Preparative and Process Chromatography Market, By Type:

Liquid Chromatography

Gas Chromatography

Thin Layer Chromatography

Paper Chromatography

Gel-permeation Chromatography

Hydrophobic Interaction Chromatography

Preparative and Process Chromatography Market, By End User:

Food

Nutraceutical

Others

Preparative and Process Chromatography Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Preparative and Process Chromatography Market.

Available Customizations:

Global Preparative and Process Chromatography 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).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. GLOBAL PREPARATIVE AND PROCESS CHROMATOGRAPHY MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Product (Process Chromatography, Preparative Chromatography)
 - 5.2.2. By Type (Liquid Chromatography, Gas Chromatography, Thin Layer

Chromatography, Paper Chromatography, Gel-permeation Chromatography, Hydrophobic Interaction Chromatography)

5.2.3. By End-use (Food, Nutraceutical, Others)

5.2.4. By Region (North America, Europe, Asia Pacific, South America, Middle East & Africa)

5.2.5. By Company (2022)

5.3. Market Map

5.3.1 By Product

5.3.2 By Type

5.3.3 By End Use

5.3.4 By Region

6. NORTH AMERICA PREPARATIVE AND PROCESS CHROMATOGRAPHY MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Product (Process Chromatography, Preparative Chromatography)

6.2.2. By Type (Liquid Chromatography, Gas Chromatography, Thin Layer Chromatography, Paper Chromatography, Gel-permeation Chromatography, Hydrophobic Interaction Chromatography)

6.2.3. By End-use (Food, Nutraceutical, Others)

6.2.4. By Country

6.3. North America: Country Analysis

6.3.1. United States Preparative and Process Chromatography Market Outlook

6.3.1.1. Market Size & Forecast

6.3.1.1.1. By Value

6.3.1.2. Market Share & Forecast

6.3.1.2.1. By Product

6.3.1.2.2. By Type

6.3.1.2.3. By End Use

6.3.2. Canada Preparative and Process Chromatography Market Outlook

6.3.2.1. Market Size & Forecast

6.3.2.1.1. By Value

6.3.2.2. Market Share & Forecast

6.3.2.2.1. By Product

6.3.2.2.2. By Type

6.3.2.2.3. By End Use

6.3.3. Mexico Preparative and Process Chromatography Market Outlook

6.3.3.1. Market Size & Forecast

6.3.3.1.1. By Value

6.3.3.2. Market Share & Forecast

6.3.3.2.1. By Product

6.3.3.2.2. By Type

6.3.3.2.3. By End Use

7. EUROPE PREPARATIVE AND PROCESS CHROMATOGRAPHY MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Product (Process Chromatography, Preparative Chromatography)

7.2.2. By Type (Liquid Chromatography, Gas Chromatography, Thin Layer Chromatography, Paper Chromatography, Gel-permeation Chromatography, Hydrophobic Interaction Chromatography)

7.2.3. By End-use (Food, Nutraceutical, Others)

7.2.4. By Country

7.3. Europe: Country Analysis

7.3.1. France Preparative and Process Chromatography Market Outlook

7.3.1.1. Market Size & Forecast

7.3.1.1.1. By Value

7.3.1.2. Market Share & Forecast

7.3.1.2.1. By Product

7.3.1.2.2. By Type

7.3.1.2.3. By End Use

7.3.2. Germany Preparative and Process Chromatography Market Outlook

7.3.2.1. Market Size & Forecast

7.3.2.1.1. By Value

7.3.2.2. Market Share & Forecast

7.3.2.2.1. By Product

7.3.2.2.2. By Type

7.3.2.2.3. By End Use

7.3.3. United Kingdom Preparative and Process Chromatography Market Outlook

7.3.3.1. Market Size & Forecast

7.3.3.1.1. By Value

7.3.3.2. Market Share & Forecast

- 7.3.3.2.1. By Product
- 7.3.3.2.2. By Type
- 7.3.3.2.3. By End Use
- 7.3.4. Italy Preparative and Process Chromatography Market Outlook
 - 7.3.4.1. Market Size & Forecast
 - 7.3.4.1.1. By Value
 - 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Product
 - 7.3.4.2.2. By Type
 - 7.3.4.2.3. By End Use
- 7.3.5. Spain Preparative and Process Chromatography Market Outlook
 - 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Value
 - 7.3.5.2. Market Share & Forecast
 - 7.3.5.2.1. By Product
 - 7.3.5.2.2. By Type
 - 7.3.5.2.3. By End Use

8. ASIA-PACIFIC PREPARATIVE AND PROCESS CHROMATOGRAPHY MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Product (Process Chromatography, Preparative Chromatography)
 - 8.2.2. By Type (Liquid Chromatography, Gas Chromatography, Thin Layer Chromatography, Paper Chromatography, Gel-permeation Chromatography, Hydrophobic Interaction Chromatography)
 - 8.2.3. By End-use (Food, Nutraceutical, Others)
 - 8.2.4. By Country
- 8.3. Asia-Pacific: Country Analysis
 - 8.3.1. China Preparative and Process Chromatography Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Product
 - 8.3.1.2.2. By Type
 - 8.3.1.2.3. By End Use
 - 8.3.2. India Preparative and Process Chromatography Market Outlook

- 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
- 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Product
 - 8.3.2.2.2. By Type
 - 8.3.2.2.3. By End Use
- 8.3.3. Japan Preparative and Process Chromatography Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Product
 - 8.3.3.2.2. By Type
 - 8.3.3.2.3. By End Use
- 8.3.4. South Korea Preparative and Process Chromatography Market Outlook
 - 8.3.4.1. Market Size & Forecast
 - 8.3.4.1.1. By Value
 - 8.3.4.2. Market Share & Forecast
 - 8.3.4.2.1. By Product
 - 8.3.4.2.2. By Type
 - 8.3.4.2.3. By End Use
- 8.3.5. Australia Preparative and Process Chromatography Market Outlook
 - 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value
 - 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Product
 - 8.3.5.2.2. By Type
 - 8.3.5.2.3. By End Use

9. SOUTH AMERICA PREPARATIVE AND PROCESS CHROMATOGRAPHY MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Product (Process Chromatography, Preparative Chromatography)
 - 9.2.2. By Type (Liquid Chromatography, Gas Chromatography, Thin Layer Chromatography, Paper Chromatography, Gel-permeation Chromatography, Hydrophobic Interaction Chromatography)
 - 9.2.3. By End-use (Food, Nutraceutical, Others)

- 9.2.4. By Country
- 9.3. South America: Country Analysis
 - 9.3.1. Brazil Preparative and Process Chromatography Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Product
 - 9.3.1.2.2. By Type
 - 9.3.1.2.3. By End Use
 - 9.3.2. Argentina Preparative and Process Chromatography Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Product
 - 9.3.2.2.2. By Type
 - 9.3.2.2.3. By End Use
 - 9.3.3. Colombia Preparative and Process Chromatography Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Product
 - 9.3.3.2.2. By Type
 - 9.3.3.2.3. By End Use

10. MIDDLE EAST AND AFRICA PREPARATIVE AND PROCESS CHROMATOGRAPHY MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Product (Process Chromatography, Preparative Chromatography)
 - 10.2.2. By Type (Liquid Chromatography, Gas Chromatography, Thin Layer Chromatography, Paper Chromatography, Gel-permeation Chromatography, Hydrophobic Interaction Chromatography)
 - 10.2.3. By End-use (Food, Nutraceutical, Others)
 - 10.2.4. By Country
- 10.3. MEA: Country Analysis
 - 10.3.1. South Africa Preparative and Process Chromatography Market Outlook
 - 10.3.1.1. Market Size & Forecast

- 10.3.1.1.1. By Value
- 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Product
 - 10.3.1.2.2. By Type
 - 10.3.1.2.3. By End Use
- 10.3.2. Saudi Arabia Preparative and Process Chromatography Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value
 - 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Product
 - 10.3.2.2.2. By Type
 - 10.3.2.2.3. By End Use
- 10.3.3. UAE Preparative and Process Chromatography Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Value
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Product
 - 10.3.3.2.2. By Type
 - 10.3.3.2.3. By End Use

11. MARKET DYNAMICS

- 11.1. Drivers
- 11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

- 12.1. Recent Development
- 12.2. Mergers & Acquisitions
- 12.3. Product Launches

13. GLOBAL PREPARATIVE AND PROCESS CHROMATOGRAPHY MARKET: SWOT ANALYSIS

14. PORTER'S FIVE FORCES ANALYSIS

- 14.1. Competition in the Industry
- 14.2. Potential of New Entrants

- 14.3. Power of Suppliers
- 14.4. Power of Customers
- 14.5. Threat of Substitute Products

15. COMPETITIVE LANDSCAPE

- 15.1. Business Overview
- 15.2. Product Offerings
- 15.3. Recent Developments
- 15.4. Financials (As Reported)
- 15.5. Key Personnel
- 15.6. SWOT Analysis
 - 15.6.1 GE Healthcare.
 - 15.6.2 Danaher Corporation
 - 15.6.3 Merck KGaA
 - 15.6.4 Bio-Rad Laboratories Inc.
 - 15.6.5 Thermo Fisher Scientific Inc.
 - 15.6.6 Shimadzu Corporation
 - 15.6.7 Agilent Technologies
 - 15.6.8 Waters Corporation
 - 15.6.9 Novasep Holding S.A.S
 - 15.6.10 Sartorius AG.

16. STRATEGIC RECOMMENDATIONS

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