

Tangential Flow Filtration Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Product (Single Use Systems, Reusable Systems, Membrane Filters, Filtration Accessories), By Membrane Material (PES, Polyvinylidene Difluoride, Nylon, PTFE, Mixed Cellulose Ester & Cellulose Acetate, PCTE, Regenerated Cellulose, Other Membrane Materials), By Technique (Microfiltration, Ultrafiltration, Nanofiltration, Other Techniques), By Application (Final Product Processing, Raw Material Filtration, Cell Separation, Water Purification, Air Purification), By End User (Pharmaceutical & Biotechnology Companies, Contract Research Organization, Academic & Research Institutes), By Region and By Competition

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Abstracts

The Global Tangential Flow Filtration Market is anticipated to witness impressive growth during the forecast period. This can be ascribed to the rising advantages of tangential flow filtration over normal flow filtration, along with the increasing adoption of single-use technologies and growing research and development in pharma and biotech companies. Also, the growing usage of the TFF technology in different downstream

processes is expected to drive the growth of the market during the forecast period. Additionally, the advantages of tangential flow filtration (TFF) for using as a high-performance and reproducible operation in biotechnology research and increasing investments for the development of novel TFF products by major companies are driving the growth of the market during the forecast period. In September 2021, ABEC, a dominant player that delivers single-use integrated solutions & services for biopharmaceutical manufacturing, announced the launch of their new TFF system called Custom Single Run (CSR) Tangential Flow Filtration (TFF) system, in order to appreciably expand downstream productivity for their bioprocess customers. Brady Cole, the VP of Equipment Solutions at ABEC, mentioned in a statement that traditional single-use TFF systems are cramped to a much lower flow rate so as to avoid bursting. But their CSR TFF having flow rates of more than 240 liters per minute makes process times shorter to attain high product concentrations.

Increasing demand for biopharmaceuticals and biologics

Biopharmaceuticals and biologics have a significant impact on the growth of the global tangential flow filtration (TFF) market. Biopharmaceuticals and biologics require highly efficient and reliable purification processes to ensure that they are safe and effective for patients. TFF is one of the most commonly used methods for the purification of biopharmaceuticals and biologics, which is driving the demand for TFF systems. The complexity of biopharmaceuticals and biologics has driven innovation in TFF technology, leading to the development of new and improved TFF systems. These systems are designed to improve the efficiency, scalability, and reliability of the TFF process, which is essential for the production of biopharmaceuticals and biologics. The biopharmaceutical industry is growing rapidly, driven by the increasing prevalence of chronic diseases and the aging population. This growth is driving the demand for TFF systems as biopharmaceutical manufacturers require efficient and cost-effective purification processes. The development of new biopharmaceuticals and biologics requires extensive research and development, which drives the demand for TFF systems. TFF is essential for the purification of small molecules, making it an essential technology for biopharmaceutical research and development. The development and approval of several COVID-19 vaccines have been a major focus in the biologics industry in the past few years. Multiple vaccines have been developed using different platforms, including mRNA and viral vector technologies, and have been authorized for emergency use in many countries. There have been several new gene therapies approved in the past few years, including Zolgensma, a gene therapy for spinal muscular atrophy, and Luxturna, a gene therapy for inherited retinal dystrophy. Gene therapies use modified viruses to deliver a functional copy of a defective gene to

patients with genetic diseases. CAR-T cell therapies are a type of immunotherapy that involves modifying a patient's own T-cells to target and destroy cancer cells. Several CAR-T cell therapies have been approved in recent years, including Kymriah and Yescarta, which are used to treat certain types of leukemia and lymphoma.

Driving innovation in TFF technology

The complexity of biopharmaceuticals and biologics has driven innovation in TFF technology, leading to the development of new and improved TFF systems. These systems are designed to improve the efficiency, scalability, and reliability of the TFF process, which is essential for the production of biopharmaceuticals and biologics. Innovation in TFF technology is the development of new materials and membranes that can improve the efficiency and performance of TFF systems. For example, the use of high-performance polymeric membranes with improved fouling resistance and selectivity can lead to higher throughput and more efficient separation of target molecules. These innovations can make TFF technology more attractive to biopharmaceutical companies and other industries that require high-purity separations. Innovation in TFF technology is the development of new TFF systems that are more automated, efficient, and cost-effective. For example, the use of microfluidic devices, automated control systems, and integrated sensors can improve the precision and reproducibility of TFF separations while also reducing the time and cost required to perform these separations. These innovations can make TFF technology more accessible to a wider range of users, from small biotech startups to large pharmaceutical companies.

Research and development of new biopharmaceuticals and biologics

Research activities play a significant role in the growth of the global tangential flow filtration (TFF) market. Research activities are essential for identifying new applications for TFF. As researchers better understand the capabilities and limitations of TFF, they can develop new and innovative applications for the technology, leading to new market opportunities. Research activities can help optimize TFF processes by identifying the best membrane materials, geometries, and operating conditions for specific applications. This leads to more efficient and effective TFF processes, reducing costs and improving performance. Research activities drive innovation in TFF technology, leading to the development of new and improved TFF systems. These systems are designed to be more efficient, scalable, and reliable, leading to increased adoption and use of TFF in the biopharmaceutical industry. Research activities can help researchers better understand the mechanisms behind TFF, leading to improved process control

and optimization. This leads to more efficient and effective TFF processes, reducing costs and improving performance. Research activities often involve collaboration and knowledge sharing between academic institutions, industry, and government. This collaboration can lead to the development of new TFF applications and technologies, as well as an improved understanding of TFF mechanisms.

Government support for the growth of the life science industry

Government support can play a significant role in the growth of the global tangential flow filtration (TFF) market. Governments can provide funding for the research and development of TFF technology. This can lead to the development of new and improved TFF systems and applications, driving innovation and growth in the market.

Governments can establish regulations and guidelines for TFF systems and applications, ensuring the safety and efficacy of TFF processes. Clear and consistent regulations can also reduce barriers to entry for new players in the market.

Governments can provide support for the commercialization of TFF technology, such as tax incentives or grants for companies that invest in TFF research and development.

This can incentivize companies to invest in TFF technology, leading to increased adoption and use of the technology in the biopharmaceutical industry. Governments can invest in infrastructure to support the growth of the TFF market, such as funding for the construction of TFF manufacturing facilities or upgrades to existing facilities. This can increase the capacity for TFF production, reducing costs and increasing efficiency.

Governments can negotiate international trade agreements that reduce barriers to the export and import of TFF technology and products. This can increase the market reach of TFF companies, leading to increased adoption and use of the technology globally.

Recent Developments

In February 2022, Pall Corporation launched its new range of Cadence single-pass TFF systems, which are designed for the continuous processing of biopharmaceuticals and other high-value products.

In January 2022, Sartorius AG announced a collaboration with the French biotech company, TreeFrog Therapeutics, to develop scalable cell culture systems for the production of induced pluripotent stem cells (iPSCs).

Allegro STR 1000 Single-Use Stirred Tank Bioreactor System (2019) – Pall Corporation launched the Allegro STR 1000 Single-Use Stirred Tank Bioreactor System, which incorporates TFF technology for continuous cell retention and

clarification during bioprocessing.

Mustang XT Acrodisc Unit (2019) - Merck KGaA launched the Mustang XT Acrodisc Unit, a single-use TFF device that enables efficient clarification and concentration of biopharmaceuticals.

SoloHill Engineering SoloStep Disposable TFF Capsules (2019) - SoloHill Engineering launched the SoloStep Disposable TFF Capsules, a line of single-use TFF capsules that are designed to be easy to use and cost-effective for small-scale bioprocessing applications.

XCell ATF 2.5 Automation System (2020) - Repligen Corporation launched the XCell ATF 2.5 Automation System, an automated TFF system that utilizes alternating tangential flow (ATF) technology to enable continuous cell culture perfusion.

Market Segmentation

Global Tangential Flow Filtration market can be segmented by product, membrane material, technique, application, end-user, region, and competitive landscape. Based on the product, the market can be segmented into Single Use Systems, Reusable Systems, Membrane Filters, and Filtration Accessories. Based on membrane material, the market can be segmented into PES, Polyvinylidene Difluoride, Nylon, PTFE, Mixed cellulose ester & cellulose acetate, PCTE, Regenerated Cellulose, and Other membrane materials. Based on the technique, the market can be differentiated into Microfiltration, Ultrafiltration, Nanofiltration, and Other Techniques. Based on application, the market can be segmented into Final product processing, Raw material filtration, Cell separation, Water purification, and Air purification. Based on the end user, the market can be differentiated into Pharmaceutical & Biotechnology companies, Contract research organizations, and Academic & Research institutes. Regionally, North America dominates the market among Asia Pacific, Europe, Middle East & Africa, and South America. Among the different countries, the United States dominates the Global Tangential Flow Filtration Market on account of the growing well-developed laboratories in the country.

Market Players

Merck KGAA., Danaher Corporation, Sartorius AG, Parker Hannifin Corporation,

Repligen Corporation, Alfa Laval Corporate AB., Andritz, Meissner Filtration Products Inc., Cole Parmer Instrument Company Inc., and Sterlitech Corporation are some of the leading players operating in the Global Tangential Flow Filtration Market.

Report Scope:

In this report, Global Tangential Flow Filtration Market has been segmented into the following categories, in addition to the industry trends, which have also been detailed below:

Tangential Flow Filtration Market, By Product:

Single-use systems

Reusable Systems

Membrane Filters

Filtration Accessories

Tangential Flow Filtration Market, By Membrane Material:

PES

Polyvinylidene Difluoride

Nylon

PTFE

Mixed Cellulose Ester & Cellulose Acetate

PCTE

Regenerated Cellulose

Other Membrane Materials

Tangential Flow Filtration Market, By Technique:

Microfiltration

Ultrafiltration

Nanofiltration

Other Techniques

Tangential Flow Filtration Market, By Application:

Final Product Processing

Raw Material Filtration

Cell Separation

Water Purification

Air Purification

Tangential Flow Filtration Market, By End User:

Pharmaceutical & Biotechnology Companies

Contract Research Organization

Academic & Research Institutes

Tangential Flow Filtration Market, By Region:

North America

United States

Canada

Mexico

Europe

France

Germany

United Kingdom

Italy

Spain

Asia Pacific

China

India

Japan

South Korea

Australia

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 Tangential Flow Filtration Market.

Available Customizations:

With the given market data, TechSci 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 TANGENTIAL FLOW FILTRATION MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Product (Single use systems, Reusable Systems, Membrane Filters, Filtration Accessories)
 - 5.2.2. By Membrane Material (PES, Polyvinylidene Difluoride, Nylon, PTFE, Mixed cellulose ester & cellulose acetate, PCTE, Regenerated Cellulose, Other membrane

materials)

5.2.3. By Technique (Microfiltration, Ultrafiltration, Nanofiltration, Other Techniques)

5.2.4. By Application (Final product processing, Raw material filtration, Cell separation, Water purification, Air purification)

5.2.5. By End User (Pharmaceutical & Biotechnology companies, Contract research organization, Academic & Research institutes)

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

5.2.7. By Company (2022)

5.3. Market Map

5.3.1 By Product

5.3.2 By Membrane Material

5.3.3 By Technique

5.3.4 By Application

5.3.5 By End user

5.3.6 By Region

6. NORTH AMERICA TANGENTIAL FLOW FILTRATION MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Product (Single use systems, Reusable Systems, Membrane Filters, Filtration Accessories)

6.2.2. By Membrane Material (PES, Polyvinylidene Difluoride, Nylon, PTFE, Mixed cellulose ester & cellulose acetate, PCTE, Regenerated Cellulose, Other membrane materials)

6.2.3. By Technique (Microfiltration, Ultrafiltration, Nanofiltration, Other Techniques)

6.2.4. By Application (Final product processing, Raw material filtration, Cell separation, Water purification, Air purification)

6.2.5. By End User (Pharmaceutical & Biotechnology companies, Contract research organization, Academic & Research institutes)

6.2.6. By Country

6.3. North America: Country Analysis

6.3.1. United States Tangential Flow Filtration 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 Membrane Material
- 6.3.1.2.3. By Technique
- 6.3.1.2.4. By Application
- 6.3.1.2.5. By End User
- 6.3.2. Canada Tangential Flow Filtration 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 Membrane Material
 - 6.3.2.2.3. By Technique
 - 6.3.2.2.4. By Application
 - 6.3.2.2.5. By End User
- 6.3.3. Mexico Tangential Flow Filtration 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 Membrane Material
 - 6.3.3.2.3. By Technique
 - 6.3.3.2.4. By Application
 - 6.3.3.2.5. By End User

7. EUROPE TANGENTIAL FLOW FILTRATION MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Product (Single use systems, Reusable Systems, Membrane Filters, Filtration Accessories)
 - 7.2.2. By Membrane Material (PES, Polyvinylidene Difluoride, Nylon, PTFE, Mixed cellulose ester & cellulose acetate, PCTE, Regenerated Cellulose, Other membrane materials)
 - 7.2.3. By Technique (Microfiltration, Ultrafiltration, Nanofiltration, Other Techniques)
 - 7.2.4. By Application (Final product processing, Raw material filtration, Cell separation, Water purification, Air purification)
 - 7.2.5. By End User (Pharmaceutical & Biotechnology companies, Contract research organization, Academic & Research institutes)
 - 7.2.6. By Country

7.3. Europe: Country Analysis

7.3.1. France Tangential Flow Filtration 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 Membrane Material

7.3.1.2.3. By Technique

7.3.1.2.4. By Application

7.3.1.2.5. By End User

7.3.2. Germany Tangential Flow Filtration 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 Membrane Material

7.3.2.2.3. By Technique

7.3.2.2.4. By Application

7.3.2.2.5. By End User

7.3.3. United Kingdom Tangential Flow Filtration 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 Membrane Material

7.3.3.2.3. By Technique

7.3.3.2.4. By Application

7.3.3.2.5. By End User

7.3.4. Italy Tangential Flow Filtration 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 Membrane Material

7.3.4.2.3. By Technique

7.3.4.2.4. By Application

7.3.4.2.5. By End User

7.3.5. Spain Tangential Flow Filtration 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 Membrane Material
 - 7.3.5.2.3. By Technique
 - 7.3.5.2.4. By Application
 - 7.3.5.2.5. By End User

8. ASIA-PACIFIC TANGENTIAL FLOW FILTRATION MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Product (Single use systems, Reusable Systems, Membrane Filters, Filtration Accessories)
 - 8.2.2. By Membrane Material (PES, Polyvinylidene Difluoride, Nylon, PTFE, Mixed cellulose ester & cellulose acetate, PCTE, Regenerated Cellulose, Other membrane materials)
 - 8.2.3. By Technique (Microfiltration, Ultrafiltration, Nanofiltration, Other Techniques)
 - 8.2.4. By Application (Final product processing, Raw material filtration, Cell separation, Water purification, Air purification)
 - 8.2.5. By End User (Pharmaceutical & Biotechnology companies, Contract research organization, Academic & Research institutes)
 - 8.2.6. By Country
- 8.3. Asia-Pacific: Country Analysis
 - 8.3.1. China Tangential Flow Filtration 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 Membrane Material
 - 8.3.1.2.3. By Technique
 - 8.3.1.2.4. By Application
 - 8.3.1.2.5. By End User
 - 8.3.2. India Tangential Flow Filtration 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 Membrane Material
- 8.3.2.2.3. By Technique
- 8.3.2.2.4. By Application
- 8.3.2.2.5. By End User
- 8.3.3. Japan Tangential Flow Filtration 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 Membrane Material
 - 8.3.3.2.3. By Technique
 - 8.3.3.2.4. By Application
 - 8.3.3.2.5. By End User
- 8.3.4. South Korea Tangential Flow Filtration 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 Membrane Material
 - 8.3.4.2.3. By Technique
 - 8.3.4.2.4. By Application
 - 8.3.4.2.5. By End User
- 8.3.5. Australia Tangential Flow Filtration 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 Membrane Material
 - 8.3.5.2.3. By Technique
 - 8.3.5.2.4. By Application
 - 8.3.5.2.5. By End User

9. SOUTH AMERICA TANGENTIAL FLOW FILTRATION MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Product (Single use systems, Reusable Systems, Membrane Filters, Filtration Accessories)

9.2.2. By Membrane Material (PES, Polyvinylidene Difluoride, Nylon, PTFE, Mixed cellulose ester & cellulose acetate, PCTE, Regenerated Cellulose, Other membrane materials)

9.2.3. By Technique (Microfiltration, Ultrafiltration, Nanofiltration, Other Techniques)

9.2.4. By Application (Final product processing, Raw material filtration, Cell separation, Water purification, Air purification)

9.2.5. By End User (Pharmaceutical & Biotechnology companies, Contract research organization, Academic & Research institutes)

9.2.6. By Country

9.3. South America: Country Analysis

9.3.1. Brazil Tangential Flow Filtration 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 Membrane Material

9.3.1.2.3. By Technique

9.3.1.2.4. By Application

9.3.1.2.5. By End User

9.3.2. Argentina Tangential Flow Filtration 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 Membrane Material

9.3.2.2.3. By Technique

9.3.2.2.4. By Application

9.3.2.2.5. By End User

9.3.3. Colombia Tangential Flow Filtration 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 Membrane Material

9.3.3.2.3. By Technique

9.3.3.2.4. By Application

9.3.3.2.5. By End User

10. MIDDLE EAST AND AFRICA TANGENTIAL FLOW FILTRATION MARKET

OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Product (Single use systems, Reusable Systems, Membrane Filters, Filtration Accessories)

10.2.2. By Membrane Material (PES, Polyvinylidene Difluoride, Nylon, PTFE, Mixed cellulose ester & cellulose acetate, PCTE, Regenerated Cellulose, Other membrane materials)

10.2.3. By Technique (Microfiltration, Ultrafiltration, Nanofiltration, Other Techniques)

10.2.4. By Application (Final product processing, Raw material filtration, Cell separation, Water purification, Air purification)

10.2.5. By End User (Pharmaceutical & Biotechnology companies, Contract research organization, Academic & Research institutes)

10.2.6. By Country

10.3. MEA: Country Analysis

10.3.1. South Africa Tangential Flow Filtration 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 Membrane Material

10.3.1.2.3. By Technique

10.3.1.2.4. By Application

10.3.1.2.5. By End User

10.3.2. Saudi Arabia Tangential Flow Filtration 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 Membrane Material

10.3.2.2.3. By Technique

10.3.2.2.4. By Application

10.3.2.2.5. By End User

10.3.3. UAE Tangential Flow Filtration 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 Membrane Material
- 10.3.3.2.3. By Technique
- 10.3.3.2.4. By Application
- 10.3.3.2.5. By End User

11. MARKET DYNAMICS

11.1. Drivers

- 11.1.1 Growing demand for lab automation activities
- 11.1.2 Growing adoption of lab informatics by biobanks
- 11.1.3 Growing introduction of technologically advanced software services

11.2. Challenges

- 11.2.1 Lack of integration standards for laboratory informatics
- 11.2.2 Stringent Regulations

12. MARKET TRENDS & DEVELOPMENTS

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

13. GLOBAL TANGENTIAL FLOW FILTRATION 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 Merck KGAA

15.6.2 Danaher Corporation

15.6.3 Sartorius AG

15.6.4 Parker Hannifin Corporation

15.6.5 Repligen Corporation

15.6.6 Alfa Laval Corporate AB

15.6.7 Andritz

15.6.8 Meissner Filtration Products Inc.

15.6.9 Cole Parmer Instrument Company Inc.

15.6.10 Sterlitech Corporation

16. STRATEGIC RECOMMENDATIONS

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Product name: Tangential Flow Filtration Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Product (Single Use Systems, Reusable Systems, Membrane Filters, Filtration Accessories), By Membrane Material (PES, Polyvinylidene Difluoride, Nylon, PTFE, Mixed Cellulose Ester & Cellulose Acetate, PCTE, Regenerated Cellulose, Other Membrane Materials), By Technique (Microfiltration, Ultrafiltration, Nanofiltration, Other Techniques), By Application (Final Product Processing, Raw Material Filtration, Cell Separation, Water Purification, Air Purification), By End User (Pharmaceutical & Biotechnology Companies, Contract Research Organization, Academic & Research Institutes), By Region and By Competition

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