

Middle East & Africa Bioprocessing Market Forecast to 2031 - Regional Analysis - by Product (Instruments and Consumables & Accessories), Scale of Operation (Commercial Operations and Clinical Operations), Process (Downstream Bioprocess and Upstream Bioprocess), Application (Monoclonal Antibodies, Vaccines, Recombinant Protein, Cell & Gene Therapy, and Others), and End User (Biopharmaceutical Companies, Contract Manufacturing Organization, and Others)

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Abstracts

The Middle East & Africa bioprocessing market was valued at US\$ 314.37 million in 2023 and is expected to reach US\$ 725.54 million by 2031; it is estimated to register a CAGR of 11.0% from 2023 to 2031.

Shift Toward Automated Cell Therapy Manufacturing Bolsters Middle East & Africa Bioprocessing Market

A rising number of cell therapies have shifted the production of cell therapy products from a small volume to a large volume worldwide. Increasing research activities in cell therapies have led to a rise in the demand for advanced manufacturing solutions. In view of this, many players are offering products to meet the needs of academic researchers and large biotechnology companies. For instance, the Lonza Cocoon and the CliniMACS Prodigy system from Miltenyi are designed to enable the automation of most sequential unit operations for a CAR-T process within a single system. In addition,

the evolution of cell therapy-from an academic and clinical setting to mass production and commercialization-is increasing the demand for automation in manufacturing. In May 2019, GE Healthcare launched the Chronicle web application to support the complete cell therapy workflow. Chronicle automation software is a good manufacturing practice-compliant digital solution designed to optimize complex cell therapy process development and manufacturing. Companies are also entering into strategic and technological developments for automation in cell therapy. For instance, in July 2020, Thermo Fisher Scientific Inc. and Lyell Immunopharma partnered to develop and manufacture processes to design effective cell therapies for cancer patients. Under this partnership, the companies aim to improve the fitness of T-cells and support the development of an integrated cGMP-compliant platform (system and software) along with reagents, consumables, and instruments. In March 2019, Lonza partnered with Israel's Sheba Medical Center to provide automated and closed CAR-T manufacturing using its point-of-care Cocoon cell therapy manufacturing platform. Automated procedures can drastically reduce the production cost and enhance staff productivity and retention rates. Other than these factors, automated processes restrict various possible sources of contamination in the manufacturing unit and eventually enhance process consistency, which results in overall good quality products by reducing manual errors. Thus, the increasing adoption of automation among cell therapy manufacturers and the growing product innovations in the field of cell therapy are likely to boost cell therapy bioprocessing or manufacturing.

Middle East & Africa Bioprocessing Market Overview

The Middle East & Africa bioprocessing market is segmented into Saudi Arabia, the UAE, South Africa, and the Rest of the Middle East & Africa. Saudi Arabia holds the largest share of the market in the Middle East & Africa. The increasing prevalence of cancer, growing incidence of immunological disorders, favorable initiatives by governments, and an upsurge in research and development activities are a few factors driving the market in this region. Saudi Arabian ministries are signing agreements with biotech companies for establishing production facilities in the country. In line with this, expansion strategies adopted by international companies to strengthen their presence in the Middle East & Africa are expected to benefit the bioprocessing market in the upcoming years.

Middle East & Africa Bioprocessing Market Revenue and Forecast to 2031 (US\$ Million)

Middle East & Africa Bioprocessing Market Segmentation

The Middle East & Africa bioprocessing market is categorized into product, scale of operation, process, application, end user, and country.

Based on product, the Middle East & Africa bioprocessing market is bifurcated into instruments and consumables & accessories. The instruments segment held a larger market share in 2023. Furthermore, the instruments segment is sub segmented into filtration devices, bioreactors, chromatography systems, centrifuge, drying devices, and others. Additionally, the bioreactors subsegment is categorized into pilot scale, full scale, and laboratory scale. Furthermore, the subsegment chromatography systems is segmented into liquid chromatography, gas chromatography, and others. Additionally, the consumables & accessories segment is sub segmented into reagents, cell culture media, chromatography resins, and others.

In terms of scale of operation, the Middle East & Africa bioprocessing market is bifurcated into commercial operations and clinical operations. The commercial operations segment held a larger market share in 2023.

By process, the Middle East & Africa bioprocessing market is bifurcated into downstream bioprocess and upstream bioprocess. The downstream bioprocess segment held a larger market share in 2023.

Based on application, the Middle East & Africa bioprocessing market is categorized into monoclonal antibodies, vaccines, recombinant protein, cell & gene therapy, and others. The monoclonal antibodies segment held the largest market share in 2023.

In terms of end user, the Middle East & Africa bioprocessing market is categorized into biopharmaceutical companies, contract manufacturing organization, and others. The biopharmaceutical companies segment held the largest market share in 2023.

By country, the Middle East & Africa bioprocessing market is segmented into Saudi Arabia, South Africa, the UAE, and the Rest of Middle East & Africa. Saudi Arabia dominated the Middle East & Africa bioprocessing market share in 2023.

Getinge AB, Thermo Fisher Scientific Inc, Sartorius AG, Corning Inc, Bio-Rad Laboratories Inc, Merck KGaA, 3M Co, Eppendorf SE, Agilent Technologies Inc, and Cytiva US LLC. are some of the leading companies operating in the Middle East & Africa bioprocessing market.

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