

Middle East & Africa Pharmaceutical Membrane Filters Market Size and Forecast (2021 - 2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Technology (Microfiltration, Ultrafiltration, Reverse Osmosis, and Nanofiltration), Design (Hollow Fiber, Spiral Wound, Tubular System, and Plate and Frame), Material [Polyethersulfone (PES), Polysulfone (PS), Cellulose-Based Membranes, Polytetrafluoroethylene (PTFE), Polyvinyl Chloride (PVC), Polyacrylonitrile (PAN), and Others], and End User (Pharmaceutical and Biotech Industries and CROs and CDMOs)

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Abstracts

The Middle East & Africa (MEA) pharmaceutical membrane filters market is poised for significant growth, with projections indicating an increase from US\$ 508.2 million in 2024 to US\$ 1,052.0 million by 2031. This growth trajectory reflects a compound annual growth rate (CAGR) of 11.0% over the forecast period from 2024 to 2031.

Several factors are driving this expansion, particularly in key markets such as Saudi Arabia, the United Arab Emirates (UAE), and South Africa. The region is experiencing a surge in healthcare investments, an increase in pharmaceutical manufacturing capabilities, and the establishment of more stringent regulatory standards. Saudi Arabia and the UAE are leading the charge in biotechnology advancements, which has resulted in a heightened demand for membrane filtration solutions that ensure product

quality and safety. In South Africa, the growth of pharmaceutical production, especially in the generics sector, is further fueling the need for effective filtration technologies.

The broader MEA region is benefiting from increased healthcare sector investments and the strengthening of regulatory frameworks that mandate high-quality filtration systems. As pharmaceutical manufacturing continues to expand, the demand for membrane filters is expected to rise, driven by both local production and the region's growing role in the global pharmaceutical supply chain. This collective growth trajectory ensures sustained market expansion for membrane filters in the Middle East and Africa.

Market Segmentation Analysis

The MEA pharmaceutical membrane filters market can be segmented by technology, design, material, and end user.

By Technology: The market is divided into Microfiltration, Ultrafiltration, Reverse Osmosis, and Nanofiltration. Microfiltration is anticipated to hold the largest market share in 2024.

By Design: The segmentation includes Hollow Fiber, Spiral Wound, Tubular System, and Plate and Frame, with Hollow Fiber expected to dominate the market share in 2024.

By Material: The materials used in membrane filters include Polyethersulfone (PES), Polysulfone (PS), Cellulose-Based Membranes, Polytetrafluoroethylene (PTFE), Polyvinyl Chloride (PVC), Polyacrylonitrile (PAN), among others. Polyethersulfone (PES) is projected to lead the market in 2024.

By End User: The market is segmented into Pharmaceutical and Biotech Industries, and Contract Research Organizations (CROs) and Contract Development and Manufacturing Organizations (CDMOs), with the pharmaceutical and biotech industries holding the largest share in 2024.

Market Outlook

The pharmaceutical industry in emerging markets, particularly India and China, is rapidly expanding, transforming these nations into global drug manufacturing hubs.

Their competitive advantages, such as cost-effective production, skilled labor, favorable government policies, and increasing domestic demand, are driving large-scale pharmaceutical production. Consequently, the need for advanced membrane filtration systems has surged, ensuring drug purity, regulatory compliance, and manufacturing efficiency.

Pharmaceutical companies are increasingly seeking membrane filtration solutions that balance efficiency with affordability. This trend has led to the adoption of high-performance, scalable filtration systems that optimize production costs through reusable or single-use membranes, energy-efficient designs, and high-throughput filtration technologies. As exports to highly regulated markets like the US and Europe rise, pharmaceutical firms in India and China must adhere to stringent filtration standards, further driving demand for advanced membrane filtration solutions.

The long-term growth of pharmaceutical manufacturing in these emerging economies is expected to sustain high demand for filtration technologies, supported by increasing healthcare needs, government incentives, and the rise of biosimilars and personalized medicine. Additionally, as sustainability becomes a priority, companies are shifting towards eco-friendly filtration systems that reduce waste, lower energy consumption, and enhance operational efficiency. As India and China solidify their positions as global pharmaceutical powerhouses, advanced membrane filtration technologies will be crucial in ensuring drug safety, quality, and cost efficiency, presenting significant opportunities for both domestic and international membrane filter manufacturers.

Country Insights

By country, the MEA pharmaceutical membrane filters market is segmented into South Africa, Saudi Arabia, the UAE, and the Rest of Middle East & Africa. South Africa is expected to hold the largest market share in 2024.

South Africa stands out as one of the largest pharmaceutical markets in Africa, characterized by a strong presence of both multinational and domestic drug manufacturers. The biopharmaceutical market in South Africa is predominantly led by multinational corporations (MNCs) such as Pfizer, GlaxoSmithKline (GSK), Johnson & Johnson, Sanofi, and AbbVie. These companies often collaborate with local firms to effectively distribute their products within the country. The South African pharmaceutical sector comprises approximately 265 manufacturers, with a significant portion serving the private sector. The demand for sterile and high-purity drugs, particularly in the production of generics, biosimilars, and vaccines, is driving the pharmaceutical

membrane filters market in South Africa. Government initiatives aimed at expanding local drug production and reducing reliance on imports are further bolstering this demand.

Contents

1. INTRODUCTION

- 1.1 Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights
- 2.2 Market Attractiveness

3. RESEARCH METHODOLOGY

- 3.1 Secondary Research
- 3.2 Primary Research
 - 3.2.1 Hypothesis formulation:
 - 3.2.2 Macroeconomic factor analysis:
 - 3.2.3 Developing base number:
 - 3.2.4 Data Triangulation:
 - 3.2.5 Country-level data:

4. PHARMACEUTICAL MEMBRANE FILTERS MARKET LANDSCAPE

- 4.1 PEST Analysis

5. MIDDLE EAST & AFRICA PHARMACEUTICAL MEMBRANE FILTERS MARKET - KEY MARKET DYNAMICS

- 5.1 Market Drivers
- 5.2 Market Restraints
- 5.3 Market Opportunities
- 5.4 Future Trends
- 5.5 Impact of Drivers and Restraints:

6. PHARMACEUTICAL MEMBRANE FILTERS MARKET - MIDDLE EAST & AFRICA MARKET ANALYSIS

- 6.1 Middle East & Africa Pharmaceutical Membrane Filters Market Revenue (US\$)

Million), 2024 - 2031

6.2 Middle East & Africa Pharmaceutical Membrane Filters Market Forecast and Analysis

7. MIDDLE EAST & AFRICA PHARMACEUTICAL MEMBRANE FILTERS MARKET REVENUE ANALYSIS - BY TECHNOLOGY

7.1 Microfiltration

7.1.1 Overview

7.1.2 Microfiltration: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.2 Ultrafiltration

7.2.1 Overview

7.2.2 Ultrafiltration: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.3 Reverse Osmosis

7.3.1 Overview

7.3.2 Reverse Osmosis: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.4 Nanofiltration

7.4.1 Overview

7.4.2 Nanofiltration: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8. MIDDLE EAST & AFRICA PHARMACEUTICAL MEMBRANE FILTERS MARKET REVENUE ANALYSIS - BY DESIGN

8.1 Hollow Fiber

8.1.1 Overview

8.1.2 Hollow Fiber: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.2 Spiral Wound

8.2.1 Overview

8.2.2 Spiral Wound: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.3 Tubular System

8.3.1 Overview

8.3.2 Tubular System: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.4 Plate and Frame

8.4.1 Overview

8.4.2 Plate and Frame: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9. MIDDLE EAST & AFRICA PHARMACEUTICAL MEMBRANE FILTERS MARKET REVENUE ANALYSIS - BY MATERIAL

9.1 Polyethersulfone (PES)

9.1.1 Overview

9.1.2 Polyethersulfone (PES): Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.2 Polysulfone (PS)

9.2.1 Overview

9.2.2 Polysulfone (PS): Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.3 Cellulose-Based Membranes

9.3.1 Overview

9.3.2 Cellulose-Based Membranes: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.4 Polytetrafluoroethylene (PTFE)

9.4.1 Overview

9.4.2 Polytetrafluoroethylene (PTFE): Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.5 Polyvinyl Chloride (PVC)

9.5.1 Overview

9.5.2 Polyvinyl Chloride (PVC): Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.6 Polyacrylonitrile (PAN)

9.6.1 Overview

9.6.2 Polyacrylonitrile (PAN): Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.7 Others

9.7.1 Overview

9.7.2 Others: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10. MIDDLE EAST & AFRICA PHARMACEUTICAL MEMBRANE FILTERS MARKET REVENUE ANALYSIS - BY END USER

10.1 Pharmaceutical and Biotech Industries

10.1.1 Overview

10.1.2 Pharmaceutical and Biotech Industries: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.2 CROs and CDMOs

10.2.1 Overview

10.2.2 CROs and CDMOs: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

11. MIDDLE EAST & AFRICA PHARMACEUTICAL MEMBRANE FILTERS MARKET - COUNTRY ANALYSIS

11.1 Middle East & Africa

11.1.1 Middle East & Africa Pharmaceutical Membrane Filters Market Revenue and Forecast and Analysis - by Country

11.1.1.1 Middle East & Africa Pharmaceutical Membrane Filters Market Revenue and Forecast and Analysis - by Country

11.1.2.2 South Africa: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

11.1.2.2.1 South Africa: Middle East & Africa Pharmaceutical Membrane Filters Market Share - by Technology

11.1.2.2.2 South Africa: Middle East & Africa Pharmaceutical Membrane Filters Market Share - by Design

11.1.2.2.3 South Africa: Middle East & Africa Pharmaceutical Membrane Filters Market Share - by Material

11.1.2.2.4 South Africa: Middle East & Africa Pharmaceutical Membrane Filters Market Share - by End User

11.2.3.3 Saudi Arabia: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

11.2.3.3.1 Saudi Arabia: Middle East & Africa Pharmaceutical Membrane Filters Market Share - by Technology

11.2.3.3.2 Saudi Arabia: Middle East & Africa Pharmaceutical Membrane Filters Market Share - by Design

11.2.3.3.3 Saudi Arabia: Middle East & Africa Pharmaceutical Membrane Filters Market Share - by Material

11.2.3.3.4 Saudi Arabia: Middle East & Africa Pharmaceutical Membrane Filters Market Share - by End User

11.3.4.4 United Arab Emirates: Middle East & Africa Pharmaceutical Membrane

Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

11.3.4.4.1 United Arab Emirates: Middle East & Africa Pharmaceutical Membrane Filters Market Share - by Technology

11.3.4.4.2 United Arab Emirates: Middle East & Africa Pharmaceutical Membrane Filters Market Share - by Design

11.3.4.4.3 United Arab Emirates: Middle East & Africa Pharmaceutical Membrane Filters Market Share - by Material

11.3.4.4.4 United Arab Emirates: Middle East & Africa Pharmaceutical Membrane Filters Market Share - by End User

11.4.5.5 Rest of Middle East & Africa: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

11.4.5.5.1 Rest of Middle East & Africa: Middle East & Africa Pharmaceutical Membrane Filters Market Share - by Technology

11.4.5.5.2 Rest of Middle East & Africa: Middle East & Africa Pharmaceutical Membrane Filters Market Share - by Design

11.4.5.5.3 Rest of Middle East & Africa: Middle East & Africa Pharmaceutical Membrane Filters Market Share - by Material

11.4.5.5.4 Rest of Middle East & Africa: Middle East & Africa Pharmaceutical Membrane Filters Market Share - by End User

13 INDUSTRY LANDSCAPE

13.1 Overview

13.2 New Product Development

13.3 Merger and Acquisition

13.4 Other Strategic Developments

14 COMPANY PROFILES

14.1 Thermo Fisher Scientific Inc

14.1.1 Key Facts

14.1.2 Business Description

14.1.3 Products and Services

14.1.4 Financial Overview

14.1.5 SWOT Analysis

14.1.6 Key Developments

14.2 Parker Hannifin Corporation

14.2.1 Key Facts

14.2.2 Business Description

- 14.2.3 Products and Services
- 14.2.4 Financial Overview
- 14.2.5 SWOT Analysis
- 14.2.6 Key Developments
- 14.3 Asahi Kasei Corp
 - 14.3.1 Key Facts
 - 14.3.2 Business Description
 - 14.3.3 Products and Services
 - 14.3.4 Financial Overview
 - 14.3.5 SWOT Analysis
 - 14.3.6 Key Developments
- 14.4 3M Co
 - 14.4.1 Key Facts
 - 14.4.2 Business Description
 - 14.4.3 Products and Services
 - 14.4.4 Financial Overview
 - 14.4.5 SWOT Analysis
 - 14.4.6 Key Developments
- 14.5 Merck KGaA
 - 14.5.1 Key Facts
 - 14.5.2 Business Description
 - 14.5.3 Products and Services
 - 14.5.4 Financial Overview
 - 14.5.5 SWOT Analysis
 - 14.5.6 Key Developments
- 14.6 GEA Group AG
 - 14.6.1 Key Facts
 - 14.6.2 Business Description
 - 14.6.3 Products and Services
 - 14.6.4 Financial Overview
 - 14.6.5 SWOT Analysis
 - 14.6.6 Key Developments
- 14.7 Sartorius AG
 - 14.7.1 Key Facts
 - 14.7.2 Business Description
 - 14.7.3 Products and Services
 - 14.7.4 Financial Overview
 - 14.7.5 SWOT Analysis
 - 14.7.6 Key Developments

14.8 W L Gore & Associates Inc

- 14.8.1 Key Facts
- 14.8.2 Business Description
- 14.8.3 Products and Services
- 14.8.4 Financial Overview
- 14.8.5 SWOT Analysis
- 14.8.6 Key Developments

14.9 Alfa Laval AB

- 14.9.1 Key Facts
- 14.9.2 Business Description
- 14.9.3 Products and Services
- 14.9.4 Financial Overview
- 14.9.5 SWOT Analysis
- 14.9.6 Key Developments

14.10 Repligen Corp

- 14.10.1 Key Facts
- 14.10.2 Business Description
- 14.10.3 Products and Services
- 14.10.4 Financial Overview
- 14.10.5 SWOT Analysis
- 14.10.6 Key Developments

14.11 Membrane Solutions, LLC

- 14.11.1 Key Facts
- 14.11.2 Business Description
- 14.11.3 Products and Services
- 14.11.4 Financial Overview
- 14.11.5 SWOT Analysis
- 14.11.6 Key Developments

14.12 Danaher Corp

- 14.12.1 Key Facts
- 14.12.2 Business Description
- 14.12.3 Products and Services
- 14.12.4 Financial Overview
- 14.12.5 SWOT Analysis
- 14.12.6 Key Developments

14.13 Koch Industries Inc

- 14.13.1 Key Facts
- 14.13.2 Business Description
- 14.13.3 Products and Services

- 14.13.4 Financial Overview
- 14.13.5 SWOT Analysis
- 14.13.6 Key Developments
- 14.14 TAMI Industries S.A.S
 - 14.14.1 Key Facts
 - 14.14.2 Business Description
 - 14.14.3 Products and Services
 - 14.14.4 Financial Overview
 - 14.14.5 SWOT Analysis
 - 14.14.6 Key Developments
- 14.15 Meissner Filtration Products, Inc.
 - 14.15.1 Key Facts
 - 14.15.2 Business Description
 - 14.15.3 Products and Services
 - 14.15.4 Financial Overview
 - 14.15.5 SWOT Analysis
 - 14.15.6 Key Developments

15. APPENDIX

- 15.1 About The Insight Partners

List Of Tables

LIST OF TABLES

Table 1. Middle East & Africa Pharmaceutical Membrane Filters Market Segmentation

Table 3. Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Table 4. Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Technology

Table 5. Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Design

Table 6. Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Material

Table 7. Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End User

Table 8. Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Country

Table 9. South Africa: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Technology

Table 10. South Africa: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Design

Table 11. South Africa: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Material

Table 12. South Africa: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End User

Table 13. Saudi Arabia: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Technology

Table 14. Saudi Arabia: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Design

Table 15. Saudi Arabia: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Material

Table 16. Saudi Arabia: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End User

Table 17. United Arab Emirates: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Technology

Table 18. United Arab Emirates: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Design

Table 19. United Arab Emirates: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Material

Table 20. United Arab Emirates: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End User

Table 21. Rest of Middle East & Africa: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Technology

Table 22. Rest of Middle East & Africa: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Design

Table 23. Rest of Middle East & Africa: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Material

Table 24. Rest of Middle East & Africa: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End User

List Of Figures

LIST OF FIGURES

- Figure 1. Middle East & Africa Pharmaceutical Membrane Filters Market Segmentation - Country
- Figure 2. PEST Analysis
- Figure 4. Middle East & Africa Pharmaceutical Membrane Filters Market - Key Market Dynamics
- Figure 5. Impact Analysis of Drivers and Restraints
- Figure 6. Middle East & Africa Pharmaceutical Membrane Filters Market Revenue (US\$ Million), 2024 - 2031
- Figure 7. Middle East & Africa Pharmaceutical Membrane Filters Market Share (%) - by Technology, 2024 and 2031
- Figure 8. Microfiltration: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 9. Ultrafiltration: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 10. Reverse Osmosis: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 11. Nanofiltration: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 12. Middle East & Africa Pharmaceutical Membrane Filters Market Share (%) - by Design, 2024 and 2031
- Figure 13. Hollow Fiber: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 14. Spiral Wound: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 15. Tubular System: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 16. Plate and Frame: Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 17. Middle East & Africa Pharmaceutical Membrane Filters Market Share (%) - by Material, 2024 and 2031
- Figure 18. Polyethersulfone (PES): Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 19. Polysulfone (PS): Middle East & Africa Pharmaceutical Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 20. Cellulose-Based Membranes: Middle East & Africa Pharmaceutical

Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 21. Polytetrafluoroethylene (PTFE): Middle East & Africa Pharmaceutical

Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 22. Polyvinyl Chloride (PVC): Middle East & Africa Pharmaceutical Membrane

Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 23. Polyacrylonitrile (PAN): Middle East & Africa Pharmaceutical Membrane

Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 24. Others: Middle East & Africa Pharmaceutical Membrane Filters Market -

Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 25. Middle East & Africa Pharmaceutical Membrane Filters Market Share (%) -
by End User, 2024 and 2031

Figure 26. Pharmaceutical and Biotech Industries: Middle East & Africa Pharmaceutical
Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 27. CROs and CDMOs: Middle East & Africa Pharmaceutical Membrane Filters
Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 28. Middle East & Africa Pharmaceutical Membrane Filters Market Breakdown by
Key Countries, 2024 and 2031 (%)

Figure 29. South Africa: Middle East & Africa Pharmaceutical Membrane Filters Market -
Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 30. Saudi Arabia: Middle East & Africa Pharmaceutical Membrane Filters Market
- Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 31. United Arab Emirates: Middle East & Africa Pharmaceutical Membrane
Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 32. Rest of Middle East & Africa: Middle East & Africa Pharmaceutical
Membrane Filters Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

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