

North America 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 North America bioprocessing market was valued at US\$ 12,440.60 million in 2023 and is expected to reach US\$ 35,950.43 million by 2031; it is estimated to register a CAGR of 14.2% from 2023 to 2031.

Increasing Prevalence of Chronic Diseases Fuels North America Bioprocessing Market

The sedentary life of older people has boosted the prevalence of lifestyle disorders, such as obesity and diabetes. Inherited genes can also express these conditions along with other health concerns such as cardiovascular disease (CVDs), Alzheimer's disease, and depression. As per the National Council on Aging, Inc., 80% of adults (aged 65 and more) are reported to suffer from at least one chronic condition in their lifetime. According to the Centers for Disease Control and Prevention (CDC), approximately 6 of 10 people in the US suffered from at least one serious disease, and 4 of 10 people had two or more chronic conditions in 2020. According to WHO, in 2020,

there were more adults over 60 than children under five. The percentage of the global population over 60 will almost double from 12% to 22% between 2015 and 2050. Numerous chronic disorders, such as dementia, osteoarthritis, cancer, stroke, and cardiovascular disease, are known to be associated with aging. CVDs, such as angina pectoris, atherosclerosis, and acute myocardial infarction caused because of hectic lifestyles, are among the significant causes of mortality across the world. As per the World Heart Foundation, mortality caused due to CVD has surged by 60% over the past 30 years (1990-2020). 20.5 million deaths were recorded in 2021 due to CVDs. Diabetes is one of the life-threatening chronic diseases with no functional cure. Diabetes of all types can cause various complications in different body parts, thereby increasing the overall risk of death. According to the International Diabetes Federation, the number of diabetic cases in North America is anticipated to grow from 46 million in 2017 to 62 million by 2045. Additionally, 425 million people had diabetes in 2017, and the number is anticipated to reach 629 million by 2045 worldwide, which is an increase of about 35%. As per the Global Cancer Observatory (GLOBOCAN) estimates published in 2020, 19.3 million cancer cases were reported across the world. The number of cases was significantly high in the US, China, and India. Similarly, as per the World Health Organization data published in February 2022, ~10 million people across the world have succumbed to death due to cancer. An upsurge in the incidence of cancer indicates the need for innovative cancer treatments. Monoclonal antibodies represent a promising class of targeted anticancer agents that enhance the natural ability of immune systems to suppress cancer cell activity and eliminate cancer cells. Antibody-drug conjugates (ADCs) have also shown promising results in cancer treatment. The recognition of biosimilars as efficient and safe by specialists, patients, primary care clinicians, and other healthcare professionals is propelling its demand. Biosimilars have been proven to improve the quality of life for millions of patients. They are impactful and cost-effective options for treating many diseases, including chronic skin conditions (such as psoriasis and atopic dermatitis), bowel diseases (such as Crohn's disease, irritable bowel syndrome, and colitis), diabetes, autoimmune disease, cancer, kidney conditions, and arthritis. Biosimilar developers are adopting advanced bioprocessing technologies to achieve lower manufacturing costs, which is an important factor in determining the final consumer prices. Nearly all biosimilar developers are using modern, cutting-edge bioprocessing techniques. Therefore, with the growing prevalence of chronic diseases, the demand for biosimilars to treat life-threatening illnesses is spurring, thereby propelling the demand for bioprocessing.

North America Bioprocessing Market Overview

Growing incidences of genetic and cellular disorders are leading to increasing demand

for cell therapies. The Pharmaceutical Research and Manufacturers Association (PhRMA)'s report on the cell & gene therapy pipeline (published in 2020), revealed that there are 400 cell and gene therapies in development for targeting a variety of diseases and conditions from cancer to genetic disorders to neurologic conditions in the US. In April 2023, Cytiva launched X-platform bioreactors to simplify upstream bioprocessing operations with single-use products. Initially, these bioreactors were available in the sizes of 50 L and 200 L. The X-Platform bioreactors are now equipped with Figurate automation solution software, and they can increase process efficiency through ergonomic improvements, production capacity, and simplified supply chain operations.

The growth of the biopharmaceutical sector, mainly due to technological advancements, increasing flexibility, and low operational costs, also benefits the bioprocessing market in the US. As per the International Trade Administration (ITA), the US is the largest market for biopharmaceuticals and the global leader in R&D. According to the PhRMA, companies in the US account for nearly 50% of the global biopharmaceutical R&D work, and they have succeeded in developing many novel medicines for which they hold intellectual property rights. Thus, the increasing R&D investments by US-based biopharmaceutical and biotechnology companies to improve outcomes of clinical trials and ensure patient safety, and the growing traction toward precision medicine with rising investments by the US government contribute to the growth of the bioprocessing market in the US.

North America Bioprocessing Market Revenue and Forecast to 2031 (US\$ Million)

North America Bioprocessing Market Segmentation

The North America bioprocessing market is categorized into product, scale of operation, process, application, end user, and country.

Based on product, the North America 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 sub segment 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 North America bioprocessing market is bifurcated into commercial operations and clinical operations. The commercial operations segment held a larger market share in 2023.

By process, the North America 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 North America 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 North America 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 North America bioprocessing market is segmented into the US, Canada, and Mexico. The US dominated the North America 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, Repligen Corp, Entegris Inc, Agilent Technologies Inc, and Cytiva US LLC. are some of the leading companies operating in the North America bioprocessing market.

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