

# Downstream Processing Market will Grow at a Lucrative CAGR of 13% through 2020 - 2030

*Downstream Processing Market - Global Industry Analysis, Size, Share, Growth, Trends, and Forecast, 2020-2030*

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According to the report, the global [downstream processing market](#) was valued over US\$ 6.7 Bn in 2019. It is projected to expand at a rapid pace from 2020 to 2030. Downstream processing is a series of events that is carried out in the pharmaceutical industry for the recovery and purification of the desired yield. These procedures play a vital role in biopharmaceutical production, as these procedures help companies to reach optimum levels of products at low cost of production.



TMR Image

Downstream processing involves several procedures such as cell separation, filtration, product recovery, product extraction, purification, and treatment of product by chemical, physical, and biological means. Downstream processing is an integral step in the production of various biological and pharmaceutical products such as vaccines, recombinant proteins/enzymes, antibiotics, antibodies, hormones, diagnostic enzymes, industrial enzymes, natural fragrance, and flavor compounds.

The expansion of the global downstream processing market can be attributed to rise in the demand for vaccines for COVID-19, introduction of new products and solutions for microbial fermentation, and continuous expansion of biopharmaceutical and biotechnology industries. However, limitations & constraints in producing humanized peptides and stringent rules and regulations for validating filtration products are likely to restrain the downstream processing market in the short-term.

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North America dominated the global downstream processing market in 2019, and the trend is projected to continue during the forecast period. This can be ascribed to a large base of biopharmaceutical industries, high clinical research & development budget, and high demand for biotechnology products in the U.S.

Rise in Demand for Vaccines for COVID-19 to Drive Global Market

COVID-19 caused by coronavirus has been spreading rampantly across the globe. People infected with coronavirus experience symptoms of mild to moderate respiratory illnesses. The disease is known to spread through respiratory droplets of an infected person. Intense pressure as well as competition has been witnessed among leading players in the biopharmaceutical industry. As of January 24, 2021, around 99,857,603 people were infected with COVID-19, out of which 2,140,768 people have died. Rapid increase in the number of COVID-19 cases has led to intense pressure to develop vaccines against the virus across the globe.

As of date, the Sputnik-V from Russia, Pfizer, Inc. (BioNTech COVID-19 Vaccine) and Serum Institute of India's (Covishield), and Bharat Biotech's (Covaxin) have received emergency use approval from the respective governments in Russia, the U.S., and India. Presently, no perfect treatment or cure is available to treat the disease, and research & development activities are being carried out by leading players in the biopharmaceutical market, and all are expecting some positive outcomes very soon.

The WHO has facilitated and accelerated efforts on the development of COVID-19 vaccine on such a scale that has never been seen before in history. Several are developing COVID-19 vaccine candidates in different phases of clinical studies.

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A few companies having vaccine candidates in preclinical studies are Novavax, CureVac, GenereX Biotechnology, Vaxart, Medicago, Takis Biotech, Altimune, and Johnson & Johnson.

Consequently, leading players offering downstream processing equipment have received massive orders from biopharmaceutical companies in 2020, and the trend is likely to continue over the next three to four years.

Introduction of New Products and Solutions for Microbial Fermentation to Propel Global Market

Until recently, microbial fermentation processes were carried out in stainless steel fermenters at

pilot and production scale. This led to high cost of production and lack of flexibility in production process. Key suppliers, such as GE Healthcare and Sartorius Stedim Biotech have introduced single-use microbial fermentation systems for biopharmaceutical process development and production, with up to 1,000 liters working capacity.

In February 2018, ABEC introduced 1,000 liter working capacity single-use microbial fermenter for biopharmaceutical production. Likewise, new single-use and continuous bioprocessing systems are being introduced for downstream processes, such as BioSC and Cadence BioSMB continuous chromatography systems from GE Healthcare and Pall Life Sciences (Danaher Corporation).

Key players are also introducing automation technologies and solutions to integrate microbial fermentation systems to analyze and monitor culture process, and to increase efficacy of the production processes. For instance, GE Healthcare collaborated with Zenith Technologies and Emerson Process Management to offer automation solutions with its FlexFactory and KUBio biopharmaceutical manufacturing facilities.

These technological advances in biological products manufacturing systems are likely to fuel the adoption of upstream as well as downstream processing for production of biopharmaceuticals in the near future.

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### Purification Technique to Lead Global Market

In terms of technique, the global downstream processing market has been classified into solid-liquid separation, purification, and concentration & others. The purification segment dominated the global market in 2019, and the trend is projected to continue during the forecast period. Wide adoption of technologically advanced purification techniques, increase in volume of biological products, and significant rise in the demand for biological products are expected to drive the segment during the forecast period.

### Biopharmaceutical Manufacturers to be Major End Users

Based on end user, the global downstream processing market has been classified into biopharmaceutical manufacturers and contract manufacturing organizations. The biopharmaceutical manufacturers segment dominated the global market in 2019. The segment is projected to gain market share by the end of 2030. The expansion of the segment can be attributed to high clinical R&D and production budgets, large number of biopharmaceutical players, technical expertise, and a well-developed infrastructure.

### Downstream Processing Market: Prominent Regions

The global downstream processing market has been divided into five major regions: North America, Europe, Asia Pacific, Latin America, and Middle East & Africa. North America dominated the global downstream processing market in 2020, followed by Europe. Well-established biopharmaceutical industry, high clinical research & development budgets in North America, and rise in demand for biologic therapeutic products in the U.S. are factors driving the downstream processing market in North America.

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The market in Asia Pacific is projected to expand at a significant CAGR during the forecast period, owing to a large patient pool of chronic diseases and infections in India, China, Australia, and New Zealand, rise in per capita healthcare expenditure, rapid expansion of the biopharmaceutical industry in China and India, and increase in access to healthcare in the region.

The market in Latin America and Middle East & Africa is anticipated to expand at a moderate pace during the forecast period.

Key Players in Downstream Processing Market

The global downstream processing market is consolidated in terms of number of players. A few number of players account for significant share of the global market. Key players operating in the global downstream processing market include Danaher Corporation, Merck KGaA, Sartoris Stedim Biotech S.A., Thermo Fisher Scientific Inc., 3M Company, Lonza Group, Eppendorf AG, and Boehringer Ingelheim International GmbH.

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