Global Upstream Bioprocessing Market to Reach USD 18 Billion by 2032 Driven by Demand for Biopharmaceuticals

The global upstream bioprocessing market size is expected to reach USD 18.0 billion in 2032, and register a revenue CAGR of 7% during the forecast period.

Reports And Data

NEW YORK, NEW YORK, UNITED STATES, May 9, 2023 / EINPresswire.com/ -- The global Upstream Bioprocessing Market generated USD 9.79 billion in 2022, with an expected growth to USD 18.0 billion in 2032, and a revenue CAGR of 7% during the forecast period. The market's revenue growth is driven by an increase in chronic illness prevalence, growing demand for biopharmaceuticals, and advancements in upstream bioprocessing technology. Biopharmaceuticals, which are used to treat a variety of illnesses including cancer, diabetes, and autoimmune diseases, are in high demand and their need is expected to rise as the global population continues to age. The market is also being propelled by the technological advancements in upstream bioprocessing, such as single-use bioreactors, high-throughput screening, and automated cell culture systems, which has improved the efficiency and productivity of biopharmaceutical production.

However, the market revenue growth is hampered by several factors. The high cost of biopharmaceutical development limits patient access to these medications, which is a significant challenge for revenue growth. Additionally, the shortage of skilled workers in upstream bioprocessing limits the production of biopharmaceuticals and can restrain revenue growth. Chronic illness prevalence is also a contributing factor to market revenue growth, as chronic diseases such as diabetes, cancer, and cardiovascular conditions are major causes of death globally, accounting for approximately 60% of all fatalities, which is driving the demand for biopharmaceuticals.

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Segments Covered in the Report –

The global upstream bioprocessing market report offers a comprehensive analysis of the market trends from 2019 to 2032, along with historical data and revenue growth forecasts at global, regional, and country levels. The report segments the market based on product type, application, end-use, and region to provide a detailed overview of the industry.

In terms of product type, the global upstream bioprocessing market is segmented into cell culture media, bioreactors, filtration systems, and others. The report analyzes the revenue growth of each of these segments from 2019 to 2032.

The application segment of the market includes vaccines, monoclonal antibodies, recombinant proteins, and others. The report provides revenue growth forecasts for each of these segments from 2019 to 2032, along with an analysis of the market trends.

The end-use segment of the market is divided into biopharmaceutical companies, contract development and manufacturing organizations (CDMOs), academic and research institutes, and others. The report provides an overview of revenue growth for each of these segments from 2019 to 2032.

Finally, the report provides a regional analysis of the market, including revenue growth forecasts for North America, Europe, Asia-Pacific, Latin America, and the Middle East & Africa. The report includes country-level analysis for the United States, Canada, Mexico, Germany, the United Kingdom, France, Italy, Spain, Sweden, BENELUX, China, India, Japan, South Korea, Brazil, Saudi Arabia, UAE, South Africa, Israel, and Rest of MEA.

Overall, the report provides valuable insights into the global upstream bioprocessing market, including market trends, revenue growth forecasts, and segment analysis, which can help companies make informed decisions about their business strategies.

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Strategic Developments:
The year 2021 saw Thermo Fisher Scientific Inc. introduce the Gibco BioProduction Services Program, an all-inclusive suite of services catering to biopharmaceutical manufacturers. This program includes upstream and downstream process development, scale-up, and manufacturing services. Also in 2021, Thermo Fisher Scientific Inc. launched the Thermo Scientific HyPerforma Single-Use Fermentor (S.U.F.) System, which offers scalable and flexible options for microbial and cell culture applications, making biopharmaceutical manufacturing processes simpler and more efficient.

Merck KGaA announced the launch of its BioContinuum Platform in 2020, a connected, scalable, and flexible bioprocessing platform that optimizes the manufacturing processes of biologics and speeds up their development. In the same year, the company also introduced its Pellicon

Capsule with Ultracel Membrane, a new filtration product that enables more efficient and effective filtration of biologic materials, thanks to its high flow rates and a wide range of membrane pore sizes.

Danaher Corporation made a significant acquisition in 2019, completing the purchase of General Electric Company's Life Sciences division, which included GE Healthcare's bioprocess business. This acquisition added to Danaher's bioprocessing capabilities and product portfolio. That same year, Sartorius AG acquired a majority stake in Biological Industries, a manufacturer of cell culture media, to expand its product offerings in the upstream bioprocessing market and strengthen its position in the cell culture market.

In 2018, Lonza Group AG acquired a controlling stake in Octane Biotech Inc., a provider of bioprocessing equipment and services. This acquisition allowed Lonza to expand its product offerings in the upstream bioprocessing market and offer a complete end-to-end solution for biologics manufacturing. The same year, Lonza Group AG also launched the MODA-ESTM Platform, a software platform that streamlines and automates the environmental monitoring process in biopharmaceutical manufacturing, with advanced data analytics capabilities that improve the efficiency and accuracy of environmental monitoring workflows.

Also in 2018, Eppendorf AG launched the BioFlo 320 bioprocessing system, which is a scalable and customizable system for microbial and cell culture applications that offers advanced process control capabilities and simplifies and streamlines biopharmaceutical manufacturing processes. In 2020, Sartorius AG introduced the BIOSTAT STR Generation 3 bioreactor platform, which is fully scalable and customizable and features advanced process control capabilities that meet the needs of both research and industrial applications.

Competitive Landscape:
The global upstream bioprocessing market is a highly competitive space with a handful of key players vying for dominance. These players are heavily investing in research and development, mergers and acquisitions, and strategic partnerships to maintain their position and increase their market share.

Among the major companies operating in the global upstream bioprocessing market are Thermo Fisher Scientific Inc., Merck KGaA, Danaher Corporation, Sartorius AG, General Electric Company, Lonza Group AG, Eppendorf AG, Fujifilm Holdings Corporation, Becton, Dickinson and Company, and Corning Incorporated.

Thermo Fisher Scientific Inc. has launched various bioprocessing systems and services such as the Gibco BioProduction Services Program and the Thermo Scientific HyPerforma Single-Use Fermentor (S.U.F.) System to simplify biopharmaceutical manufacturing processes. Merck KGaA has launched the BioContinuum Platform to optimize manufacturing processes and accelerate the development of new biologics. Meanwhile, Danaher Corporation has expanded its bioprocessing capabilities and product portfolio with the acquisition of General Electric

Company's Life Sciences division, which includes GE Healthcare's bioprocess business.

Sartorius AG has acquired Biological Industries to strengthen its position in the cell culture market and expanded its product offerings in the upstream bioprocessing market. The company has also launched the BIOSTAT STR Generation 3 bioreactor platform, a fully scalable and customizable platform for biopharmaceutical manufacturing. Lonza Group AG has acquired Octane Biotech Inc. to expand its product offerings in the upstream bioprocessing market and provide a complete end-to-end solution for biologics manufacturing. The company has also launched the MODA-ESTM Platform, a new software platform designed to automate the environmental monitoring process in biopharmaceutical manufacturing.

Overall, these major players are driving innovation in the upstream bioprocessing market and are expected to continue expanding their product portfolios and market share through various strategic initiatives.

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