Cell Culture Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The cell culture market is expected to witness a CAGR of 11.0% over the forecast period (2022-2027).

With the onset of COVID-19, many biotech and pharmaceutical firms, government organizations in various countries, and research institutes started to focus on the development of effective vaccines and new therapeutics to overcome the situation. Cell culture may serve as a potential platform for the development of novel vaccines for the treatment of COVID-19. Additionally, initiatives taken by the market players in such directions also led to a significant impact on the market's growth. For instance, in January 2021, Captivate Bio launched its portfolio of cell culture tools to assist in the fight against COVID-19 and other emerging diseases in the United States. Thus, COVID-19 had a pronounced impact on the growth of the market.

The major factors such as the growing demand for personalized medicine coupled with the rise in the demand for vaccines, biopharmaceuticals, and artificial organs coupled with the advancement in technology and the launch of products and consumables are driving the growth of the market over the forecast period.

According to GLOBOCAN Statistics, there were an estimated 19.3 million new cases of cancer around the world in the year 2020, and it is projected to reach 30.2 million by 2040. Such an increasing burden of cancer creates the need for precision medicine, so the demand for cell culture is expected to increase over the coming years as cell culture plays a vital role in the development of personalized medicine. Additionally, increasing research and development in pharmaceuticals and biopharmaceuticals also contributes largely to the growth of the market. For instance, according to the European Federation of Pharmaceutical Industries and Associations, 2022 report, the pharmaceutical industry in Europe incurred expenses of EUR 39,656 million for its research and development, and for 2022, this expense is expected to be EUR 41,500 million. Such an increasing focus on research and development creates the need for cell cultures for testing the effectiveness of the drug and thus drives the growth of the market.

The launch of products is also expected to drive the growth of the market. For instance, in March 2021, Thermo Fisher Scientific launched its new Gibco Human Plasma-like Medium (HPLM). It is one of the first types of cell culture medium that mimics the

metabolic profile of human plasma and is designed to provide researchers with a realistic view of cell growth within the human body. ?

Additionally, the launch of technologically advanced and innovative products also propels the growth of the market. For instance, in February 2022, Nucleus Biologics launched Krakatoa. It is an innovative, one of the first to market media makers that helps researchers to manufacture cell culture media at the point of use.

Thus, owing to the abovementioned factors, the cell culture market is expected to show considerable growth over the forecast period. However, the high cost associated with cell-based research and the lack of infrastructure for cell-based research in emerging economies may impede the growth of the market.

Cell Culture Market Trends

Drug Development Segment is Expected to Witness Rapid Growth Over the Forecast Period.

Cell culture is an integral part of medical research and drug discovery. Drug development is a time-consuming and costly procedure that is completed in multiple stages, from target identification to lead discovery and optimization, preclinical validation, and clinical trials, culminating in approval for clinical use. Cell-based high throughput screening (HTS) is currently being carried out on cultured cells propagated in two dimensions (2D) on plastic surfaces optimized for tissue culture. With the emergence of 3D cell culture, the process of HTS has become easier and more accurate.

Furthermore, the support from the governments of different countries for drug discovery is also contributing to the growth of the segment. For instance, in July 2020, the Union Government of India launched the Drug Discovery Hackathon "Nishank". This Hackathon is a first-of-its-kind national initiative for supporting the drug discovery process and is supported by various departments as well as market players.

Additionally, the initiatives taken by the market players are also expected to boost the growth of the market segment. For instance, in November 2021, Merck signed a Memorandum of Understanding (MoU) with GI Innovation, to facilitate biomedicine development in Korea. As per the MoU, Merck provides technologies and services, including the CHOZN platform, cell culture media, and downstream process development, to promote research and development of critical life-saving cancer treatments, as well as drugs for allergy-related conditions. Such initiatives also contribute to the growth of the segment.

Thus, owing to the abovementioned factors, the market segment is expected to project significant growth over the forecast period.

North America Dominates the Global Cell Culture Market Over the Forecast Period

North America is currently dominating the cell culture market and is expected to follow the same trend over the forecast period. This is majorly attributed to the growing demand for personalized medicine coupled with the rise in the demand for vaccines, biopharmaceuticals, and artificial organs, and the presence of key players in the market.

According to the American Cancer Society's 2022 statistics, there will be an estimated 1,918,030 new cases of cancer in the United States in 2022. Such an increasing burden of diseases such as cancer creates the need for precision medicine, which leads to the increase in demand for cell culture products and consumables for their development and hence drives the growth of the market.

The launch of products by the market players is also expected to drive the growth of the market. For instance, in December 2020,

eNuvio Canada launched one of the first completely reusable 3D cell culture microplates, namely the EB-Plate. Such launches are expected to propel the growth of the market in the region. Additionally, in February 2022, KromaTiD launched a comprehensive suite of cell and blood culture growth, isolation, processing, and quality control services. The launch of such products and services by the companies also boosts the demand for cell culture products and consumables and is thus expected to drive the growth of the market.

Thus, owing to the abovementioned factors, the studied market in the North American region is expected to show considerable growth over the forecast period.

Cell Culture Market Competitor Analysis

The cell culture market is moderately competitive and consists of several major players. In terms of market share, a few of the major players currently dominate the market. The presence of major market players, such as Thermo Fisher Scientific, Danaher Corporation, Sartorius AG, Merck KGaA, and others, also increases the overall competitive rivalry of the market. Additionally, the product advancements and improvements in cell culture platforms by the major players are also increasing the competition.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

Table of Contents:

5.1.1 Product
5.1.1.1 Biosafety Equipment
5.1.1.2 Centrifuges
5.1.1.3 Cryostorage Equipment
5.1.1.4 Culture Systems/Bioreactors
5.1.1.5 Incubators
5.1.1.6 Pipetting Instruments
5.1.1.7 Others
5.1.2 Consumables
5.1.2.1 Media
5.1.2.2 Sera
5.1.2.3 Reagents
5.2 By Application
5.2.1 Biopharmaceuticals
5.2.2 Drug Development
5.2.3 Gene Therapy
5.2.4 Tissue Culture and Engineering
5.2.5 Vaccine Production
5.2.6 Other Applications
5.3 Geography
5.3.1 North America
5.3.1.1 United States
5.3.1.2 Canada
5.3.1.3 Mexico
5.3.2 Europe
5.3.2.1 Germany
5.3.2.2 United Kingdom
5.3.2.3 France
5.3.2.4 Italy
5.3.2.5 Spain
5.3.2.6 Rest of Europe
5.3.3 Asia-Pacific
5.3.3.1 China
5.3.3.2 Japan
5.3.3.3 India
5.3.3.4 Australia
5.3.3.5 South Korea
5.3.3.6 Rest of Asia-Pacific
5.3.4 Middle East
5.3.4.1 GCC
5.3.4.2 South Africa
5.3.4.3 Rest of Middle East
5.3.5 South America
5.3.5.1 Brazil
5.3.5.2 Argentina
5.3.5.3 Rest of South America

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