

Bioprocess Containers Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The bioprocess containers market is anticipated to grow at a CAGR of 12.2% over the forecast period.

Initially, the emergence of the COVID-19 pandemic had a significant impact on the bioprocess containers market because lockdowns all over the globe affected the supply chain of instruments, raw materials, and other necessary products but research & development activities came into focus for the development of a vaccine against COVID-19. There was also huge investments by the various private as well as government entities in the area for the vaccines which had a significant impact on the market because bioprocess containers played a very crucial role in the vaccine development and production. For instance, data from PubMed published in July 2021 stated that Coalition for Epidemic Preparedness Innovations (CEPI) invested USD 5.6 billion in developing COVID-19 vaccines and about USD 51.1 billion was spent on advanced purchase agreements (APAs). Hence, with such huge investments, the pandemic had a considerable positive impact on the market studied.

The major factors attributing to the market's growth include the rising global prevalence of cancer and immunological disorder cases that necessitate the requirement for vaccines and biologics, coupled with the increased preference for immunotherapy and chemotherapy that fuels the demand for bioprocess containers. For instance, according to the April 2022 report of the American Cancer Society, biologics are used in the treatment of cancer in many ways and are being used widely for the treatment.

Additionally, in August 2022, Innovent Biologics of China and Paris-based Sanofi invested USD 2.42 billion in the biopharma group to jointly develop two cancer drugs in China. As per Innovent Biologics, SAR408701, or tusamitamab ravtansine, would be used to treat lung, gastric and other cancers, while SAR444245, or non-alpha IL-2, was under phase-II studies for skin cancer, head, and neck tumors, among others. Hence, the growing burden of cancer and funding in therapeutics development are expected to boost growth in the studied market.

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In addition, the other business expansion initiatives by the companies in the area, such as expansion, mergers, acquisitions, and collaborations, are further expected to fuel growth in the bioprocess containers market over the forecast period. For instance, in June 2022, the Rare Disease division of AstraZeneca, Alexion, announced to spend about EUR 65 million (USD 68.20 million) to expand its manufacturing capabilities in Ireland over the next 18 months, the investment will be used by the company to build up its biologics manufacturing capacity and increase R&D initiatives in the country. Bioprocess containers are readily integrated in various high-performance systems during the production of biologics. Hence, owing to the above-mentioned factors, the demand for bioprocess containers is expected to increase over the forecast period and the market is expected to grow.

Furthermore, vaccines are one of the most important forms of biologics that are used in the treatment of various medical conditions, and companies are investing heavily in the development of vaccines for many diseases including rare ones which are further expected to boost the market growth. For instance, in October 2021, the Swedish investment company, Flerie Invest, invested USD 52 million to establish an innovation hub for advanced vaccines and biological drugs in Matfors in northern Sweden. During vaccine production, better liquid handling equipment is required that can manage the necessity of no-contamination. These parameters are fulfilled by the bioprocess containers which is boosting the demand for the same during vaccine production.

Therefore, due to the above-mentioned factors, the bioprocess containers market is expected to grow over the forecast period. However, the high cost associated with the equipment coupled with impurity issues related to leachable and extractable and strict regulatory regulations are expected to restrain the growth of the bioprocess containers market during the forecast period.

Bioprocess Containers Market Trends

2D Bioprocess Containers Segment is Expected to Hold the Major Market Share in the Market Over the Forecast Period

The 2D bioprocess containers segment is anticipated to hold a significant share of the market studied due to their capacity to expedite the existing biopharmaceutical production process and the fact that they are helpful for media preparation, fluid management, and storage of the produce.

For cell harvesting and delivering bulk drug products and bulk drug precursors, 2D bioprocess containers are used widely. Hence, with the investment in the development and expansion of biologics production, the demand for 2D bioprocess containers is expected to increase, which is anticipated to boost the segment's growth. Several companies offer advanced 2D bioprocess containers, such as Thermo Fisher, CellBios, and Cole-Palmer.

The rising investment in developing and producing more biologics is compelling the bioprocess container manufacturers to enhance their offerings and expand their capacity, which is expected to impact the 2D bioprocess containers segment positively. For instance, in February 2022, ALLpaQ Packaging Group announced the launch of its new range of ALLpaQ 500 PLUS Bioprocess Container. The company announced that the investment in bioprocess containers is made to lead the market and fulfill the client's requirements.

Hence, the segment is expected to witness strong growth in the coming years due to the key companies investing in the bioprocessing containers business.

North America Region is Expected to Occupy a Major Market Share in the Market Over the Forecast Period

The North American region is home to some of the largest pharmaceuticals and biopharmaceutical companies that are actively engaged in biologics development and production.

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The high demand for biopharmaceutical products owing to the high burden of chronic diseases and government initiatives is also expected to boost the market growth. For instance, in May 2021, Quebec became the fourth Canadian province to implement a mandatory biosimilar switching program. With some exceptions, the province is switching to a policy of allowing only biosimilars on lists of approved biologics, if available. Hence, such initiatives promote the adoption of biologics which is expected to have a significant positive impact on the bioprocess containers market and fuel growth in the market.

In the North American region, the United States is expected to hold a very significant market share in the bioprocess containers market owing to the massive investment in biologics and the high number of biologics approval in the country coupled with the rising burden of chronic diseases. For instance, in July 2021, Cytiva and Pall Corporation planned to invest about USD 1.5 billion over two years to expand their capacity to meet the growing demand for biotechnology products. As per the press release by Cytiva, over USD 600 million would be invested in chromatography resins, over USD 400 million in cell culture media, over USD 300 million in single-use technology, for example, bioreactors, and over USD 200 million for the expansion of their sites across China and the rest of the Asia-Pacific region, Europe, and the United States.

Similarly, in April 2022, Catalent revealed its plan to invest about USD 350 million at its facility in Bloomington, Indiana, to expand biologics drug substance and product manufacturing capabilities. The project will serve the industry's robust biologics pipeline across various modalities with new bioreactors, syringe filling lines, and additional lyophilization capacity, supported by quality control laboratories and complex automated packaging.

Therefore, due to the above-mentioned factors, the North American region is expected to hold a significant share of the bioprocess containers market, with the United States being a major market for bioprocess containers over the forecast period.

Bioprocess Containers Market Competitor Analysis

The global bioprocess containers market is moderately concentrated in terms of competition. Some prominent players currently dominating the market in terms of market share are acquiring the products, entering into partnerships with other companies to consolidate their global market positions, and launching new products. Some companies currently dominating the market are Thermo Fisher Scientific Inc, Danaher Corporation (Cytiva), Saint-Gobain S.A, Lonza Group AG, and Avantor Inc.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

4.1 Market Overview

4.2 Market Drivers

4.2.1 Increasing Demand for Biologics and Lower Risk of Cross-Contamination

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- 4.2.2 Vaccine Production Using Single-Use Disposable Technologies
- 4.3 Market Restraints
 - 4.3.1 High Cost of Equipments Coupled with Impurity Issues Related to Leachables and Extractables
 - 4.3.2 Stringent Regulatory Framework for Manufacturing Facilities with Bioprocess Containers
- 4.4 Porter's Five Forces Analysis
 - 4.4.1 Threat of New Entrants
 - 4.4.2 Bargaining Power of Buyers/Consumers
 - 4.4.3 Bargaining Power of Suppliers
 - 4.4.4 Threat of Substitute Products
 - 4.4.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION

- 5.1 By Type of Containers
 - 5.1.1 2D Bioprocess Containers
 - 5.1.2 3D Bioprocess Containers
 - 5.1.3 Other Containers and Accessories
- 5.2 By Application
 - 5.2.1 Upstream Process
 - 5.2.2 Downstream Process
 - 5.2.3 Process Development
- 5.3 By End-User
 - 5.3.1 Biopharmaceutical Companies
 - 5.3.2 Life Science R&D Companies
 - 5.3.3 Other End-Users
- 5.4 By Geography
 - 5.4.1 North America
 - 5.4.1.1 United States
 - 5.4.1.2 Canada
 - 5.4.1.3 Mexico
 - 5.4.2 Europe
 - 5.4.2.1 Germany
 - 5.4.2.2 United Kingdom
 - 5.4.2.3 France
 - 5.4.2.4 Italy
 - 5.4.2.5 Spain
 - 5.4.2.6 Rest of Europe
 - 5.4.3 Asia-Pacific
 - 5.4.3.1 China
 - 5.4.3.2 Japan
 - 5.4.3.3 India
 - 5.4.3.4 Australia
 - 5.4.3.5 South Korea
 - 5.4.3.6 Rest of Asia-Pacific
 - 5.4.4 Middle East
 - 5.4.4.1 GCC
 - 5.4.4.2 South Africa
 - 5.4.4.3 Rest of Middle East

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- 5.4.5 South America
 - 5.4.5.1 Brazil
 - 5.4.5.2 Argentina
 - 5.4.5.3 Rest of South America

6 COMPETITIVE LANDSCAPE

- 6.1 Company Profiles
 - 6.1.1 Thermo Fisher Scientific Inc.
 - 6.1.2 Cytiva
 - 6.1.3 Saint-Gobain S.A
 - 6.1.4 Lonza Group AG
 - 6.1.5 Avantor Inc
 - 6.1.6 Merck KGaA
 - 6.1.7 Sartorius AG
 - 6.1.8 CellBios Healthcare and Lifesciences Pvt Ltd
 - 6.1.9 Cole-Parmer Instrument Co
 - 6.1.10 Biomass Sensor Singapore Pte

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

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