

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

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Report description:

The cell isolation market was estimated at USD 8,946.0 million in 2021. It is expected to expand at a CAGR of 17.09% during the forecast period.

The COVID-19 pandemic has created a lucrative opportunity for researchers to study and understand the new infectious virus and develop treatments and diagnostic tools for it. Several pharmaceutical and biotech giants have been conducting rapid and extensive R&D activities to develop novel vaccines, therapies, and testing kits. This factor has significantly boosted the demand for cell isolation tools in research applications. For instance, in February 2021, the National Institute of Health of the United States launched an initiative worth USD 1.5 billion for over four years to fund investigations on "Long COVID: Long-term Effects of COVID-19". Therefore, due to such developments, the COVID-19 pandemic is expected to significantly impact the market's growth.

Cell isolation plays an important role in various applications, including biologics design and development, therapeutic protein production, in-vitro diagnostics, and other research applications. The rising prevalence of chronic and infectious diseases, such as cancer and COVID-19, and continuous government initiatives to improve the biotechnology industry are the major driving factors contributing to the market's growth. For instance, according to the American Cancer Society's 2021 report, about 1.9 million cancer cases (970,250 in males and 927,910 in females) were diagnosed in 2021 in the United States. Thus, the use of cell isolation products is expected to increase over the years for the detection, diagnosis, and administration of proper therapies to the patient. This factor may, in turn, boost the growth of the market studied.

The new investments in biotechnology and life sciences are also expected to have a significant impact on the growth of the market. These new investments may drive the demand for cell isolation products and services and lead to advancements in the cell isolation technology with ongoing research activities. For instance, in August 2021, Hyderabad (India)-based Sai Life Sciences, a contract R&D and manufacturing organization, revealed its plan of investing about INR 450 crore at its integrated R&D campus in Hyderabad by 2023, in order to expand and enhance its R&D and manufacturing facilities and other activities.

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Technological advancements and innovations in the area of cell isolation or separation are expected to augment the growth of the market. These advancements may increase the efficiency of the products and reduce their cost, thus leading to greater adoption of cell isolation products like instruments and kits. For instance, in March 2022, Thermo Fisher Scientific introduced the new, fully-customizable Gibco CTS Xenon Electroporation System, which enables large-scale cell therapy development and clinical manufacturing. Gibco CTS Xenon Electroporation System complements Thermo Fisher Scientific's portfolio of end-to-end cell therapy solutions. Hence, such innovations and product launches are expected to fuel growth in the cell isolation market during the forecast period.

However, factors such as strict regulations and compliance with cell isolation products by different countries are expected to restrain the growth of the cell isolation market during the forecast period.

Cell Isolation Market Trends

Human Cell Segment is Expected to Hold a Significant Market Share in the Cell Isolation Market During the Forecast Period

Rising focus on human and cancer research and varied applications of isolated human cells in biopharmaceutical development, clinical trials, and research are among the major factors contributing to the largest share of the market. Favorable reimbursement policies pertaining to personalized medicine in developed countries also boost the demand for human cell isolation.

Various government bodies across the region have increased their support for such research activities due to their importance. Some of the applications of isolating human cells include conducting molecular analysis of specific cell populations and isolating immune cells from peripheral blood, preparing a sample of blood separated from plasma, and studying the effects of drug candidates on cell types.

Various initiatives by key market players are expected to boost the market's growth during the forecast period. For instance, in May 2022, Akadeum Life Sciences Inc. announced the expansion of its cell isolation product portfolio with a new human B cell isolation product and updated protocol for its existing human isolation kits. Similarly, in April 2022, Applied Cells Inc. and STEMCELL Technologies announced their collaboration to deliver a new high-performance cell separation solution that combines Applied Cells' MARS platform with STEMCELL's EasySep immunomagnetic cell separation kits. This partnership will help researchers worldwide to automate and increase the efficiency of isolating high-quality cells from a wide range of sample types, such as whole blood, bone marrow, apheresis products, and dissociated tissue. STEMCELL's cell isolation reagents will broaden the applications of the MARS platform and support the specialized requirements of researchers who need to isolate extremely low-frequency cancer cells from human samples. Thus, such factors are expected to boost the segment's growth.

North America is Expected to Hold a Significant Market Share in the Cell Isolation Market During the Forecast Period

The North American region is expected to occupy a significant share of the cell isolation market due to well-established pharmaceutical and biotech industries and the high adoption of technologically advanced solutions in the United States. Extensive research activities by research universities in the field of cell therapies have also created a huge demand for cell separation solutions.

The high prevalence of chronic and infectious diseases, including the COVID-19 outbreak, has led to an increase in the demand for cell isolation solutions for research and clinical applications. For instance, according to the 2021 report of the International Diabetes Federation, the number of people with diabetes living in North America and the Caribbean region is expected to increase from 50.5 million in 2021 to 63 million by 2045. Thus, the demand for cell isolation products is anticipated to increase in North America for therapeutics and research purposes, fueling growth in the market studied.

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The United States is expected to hold a significant share of the North American cell isolation market due to the presence of some of the largest pharmaceutical companies in the country, robust life sciences R&D infrastructure, and high prevalence of chronic diseases in the country. In May 2022, the University of Texas Medical Branch (UTMB) received USD 56 million grant from the National Institute of Allergy and Infectious Diseases (NIAID). The UTMB partnered with Novartis, dubbed the UTMB-Novartis Alliance for Pandemic Preparedness (UNAPP), focusing on the coronavirus, flavivirus, and henipavirus, three major classes of viruses with pandemic potential. Therefore, due to such developments, the United States is expected to hold a major share in the cell isolation market over the forecast period.

Cell Isolation Market Competitor Analysis

The cell isolation market is competitive and consists of several market players offering advanced products in the area. In terms of market share, a few of the major players are currently dominating the market, including Becton, Dickinson & Company, Merck KGaA, Thermo Fisher Scientific, Bio-Rad Laboratories Inc., Terumo Corporation, and Danaher Corporation.

Additional Benefits:

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

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