

Sterile Filtration Market - Growth, Trends, Impact Of Covid-19, and Forecasts (2023 - 2028)

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Report description:

The sterile filtration market is expected to register a CAGR of 8% over the forecast period.

The global spread of COVID-19 had a significant impact on the market because sterilization or filtration is critical for the removal of microbes, such as bacteria, fungi, viruses, and protozoa, that may contaminate medicinal drugs, vaccines, or alternative substances, chemicals, food, and other products, posing health risks. The growing demand for COVID-19 vaccines and treatment medications propelled the sterile filtration market during the pandemic. According to an article published in the Computational and Structural Biotechnology Journal in May 2021, there were 184 vaccine candidates in preclinical research and 88 under clinical trials. The sterile filtering method is an important step in the aseptic process for recovering COVID-19 vaccine candidates since it supports high selectivity and effective vaccine candidates. Thus, COVID-19 enhanced the demand for sterile filtration techniques and is expected to follow the same trend over the forecast period, as sterile filtration is one of the important procedures in drug formulation development.

The market is driven by the rising prevalence of chronic diseases and the the growing pharmaceutical and biopharmaceutical industries. Chronic diseases include cancer, cardiovascular, neurological and others diseases, and are expected to propel the growth of the market. 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, and 608,570 Americans died from it. Thus, the high burden of chronic diseases and high investments in life science research and development are expected to drive market growth.

With increasing expenditures by biotechnology and pharmaceutical businesses in expanding their product lines and geographical reach in single-use technologies, the need for sterile filtration is predicted to increase, bolstering the growth of the analyzed market. For instance, in July 2021, Cytiva and Pall Corporation revealed a USD 1.5 billion investment over the next two years to

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meet the rising demand for biotechnology solutions, with over USD 300 million allocated for single-use technologies, such as bioreactor and single-use filters, to expand operations in the United States and the United Kingdom.

Thus, all the above-mentioned factors are expected to boost the market over the forecast period. However, the high cost of sterile filtration may restrain market growth.

Sterile Filtration Market Trends

Cartridge Filter Segment Expected to Exhibit Significant Market Growth

Cartridge filters are expected to grow because of their high dirt-holding capacity, extended service life, cost-effectiveness, reliability, and good performance. Cartridge filters are tubular filtration equipment used in various industries for filtration, ranging from pre-filtering high-purity water to final product processing and chemical filtration. They are widely used in wastewater treatment as they are effective against small contaminants.

Biopharmaceutical and pharmaceutical companies boost their research and development spending significantly. According to the data published by the Congressional Budget Office in 2021, pharmaceutical sectors were expected to spend over USD 200 billion on research and development in 2020, up from USD 83 billion in 2019. Thus, increased investments in research and development by corporations boost the company's ability to adopt innovative technologies and filtration systems, hence improving market growth.

Furthermore, technological developments and increased product approvals, as well as partnerships by key players, assist market expansion. For instance, in October 2021, the Industrial Gas Filtration and Generation Division of Parker Hannifin Corporation launched two new aftermarket cartridge filters. These filters are designed to meet special applications to help customers improve their bottom line. These launches are expected to increase the demand for cartridge filters, hence boosting the growth of the segment.

Thus, the aforementioned factors are expected to boost the growth of segment over the forecast period.

North America is Expected to Hold a Significant Share in the Market and Expected to do Same in the Forecast Period

North America is expected to hold a significant share of the market in the membrane filters segment due to factors such as rising research and development expenditure and increasing technological advancements in sterile filters. Various pharmaceutical businesses and government organizations recently increased their R&D spending, which is expected to boost market growth throughout the forecast period. For instance, as per the annual reports-2021 of 3M Company, in 2021, it invested USD 1.994 billion in research and development, compared to USD 1.878 billion in 2020. Danaher Corporation invested USD 1,742 million in its research and development in 2021, compared to USD 1,348 million in 2020. This is expected to increase the adoption of new technologies in filtration systems, which provide better accuracy and reduce fouling parameters, thereby fueling the market growth.

The presence of key market participants and advanced technology for product development are expected to establish the dominance of this area. For instance, in October 2021, the United States National Institute for Innovation in Manufacturing Biopharmaceuticals (NIIMBL) approved a USD 3 million grant for six new biopharmaceutical manufacturing devices. North Carolina State University, the University of Massachusetts, the University of Georgia, the University of Michigan, the University of Delaware, and Carnegie Mellon University are among the institutions that will receive funding. The increase in regional R&D investments is expected to boost market growth.

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New product launches of membrane filters and related filtering systems are likely to fuel market growth over the forecast period in the region. For instance, in November 2021, DuPont Water Solutions (DWS) introduced the TapTec LC HF-4040 reverse osmosis membrane filter, which is meant to combine high flow rates with reliability to be used in commercial buildings.

Sterile Filtration Market Competitor Analysis

The market for sterile filters is moderately competitive with the presence of global and local companies. With the rising use of sterile filters, few small to mid-sized companies are expected to enter the market and are believed to gain substantial shares in the future. The well-known companies in the sterile filtration market are Danaher Corporation, Merck KGaA, ThermoFisher Scientific Inc., Sartorius AG, GE Healthcare, 3M, Cole-Parmer Instrument Company, LLC, Sterlitech Corporation, Eaton Corporation, and Porvair Filtration Group.

Additional Benefits:

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

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