

Single-Use Assemblies Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 110 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The single-use assemblies market is projected to register a CAGR of 19.5% during the forecast period.

There was a significant impact of COVID-19 on the single-use assemblies market as there was growing adoption of single-use technology for research activities in COVID-19 vaccine development. Many players focused on R&D activities to develop a vaccine requiring single-use assemblies. The suppliers struggled to keep up with demand during the pandemic, propelling the market growth of single-use assemblies. For instance, according to the article published in Bioprocess International in May 2021, single-use bioprocess systems and materials were in high demand during the COVID-19 pandemic as essential resources for the development and industrial manufacture of potential vaccines and treatments. The platforms used to create innovative vaccines, such as mRNA, DNA, and viral vectors, were generally constructed using single-use technologies due to the speed and flexibility required. The high demand for single-use assemblies might have positively impacted the market growth during the pandemic. Furthermore, post-pandemic, the demand was still persistent due to the increased adoption of single-use assemblies during the development and manufacture of COVID-19 and other diseases therapies by the biopharmaceutical and pharmaceutical companies driving the market growth. Thus, the market is expected to witness stable growth over the next 3-4 years.

Factors driving the market growth include rapid and easy implementation, a low risk of cross-contamination, increased R&D investment by biopharmaceutical companies, and a growing biologics market. The adoption of single-use assemblies in the global biopharmaceutical community has increased over time due to its advantages, such as the decreased chances of cross-contamination hazards, simplified cleaning procedures, and customized solutions by using single-use assemblies. This helps accelerate drug development and the manufacturing process.

Increased R&D investment by biopharmaceutical companies is also contributing to the growth of the single-use assembly market.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

There is a vast increase in R&D spending and the introduction of new drugs in developed nations. For instance, according to the EFPIA, the estimated R&D expenditure of European pharmaceutical companies in 2021 was EUR 41,500 million. Therefore, such a considerable R&D expenditure is expected to drive market growth due to the increased adoption of single-use assemblies in development, testing, and scaling in research, driving the market growth.

Furthermore, rising initiatives from the market players, such as partnerships and acquisitions, are also expected to propel the market growth. For instance, in June 2021, Avantor acquired RIM Bio, a Chinese maker of single-use bioprocess bags and assemblies for biopharmaceutical production. By this acquisition, Avantor will access RIM's Changzhou, China, facility, making it Avantor's one of the first single-use production units in Africa, the Middle East, and Asia (AMEA) region. Avantor intends to differentiate its services for single-use clients by leveraging RIM's exclusive technology and short lead times. Such instances lead to increased adoption of single-use assemblies across different geographies, bolstering the market growth.

Therefore, the advantages of single-use assemblies over traditional processes and increased biopharmaceutical R&D activities propel market growth. However, issues related to extractables and leachables are expected to hamper the market growth.

Single-Use Assemblies Market Trends

Biopharmaceutical & Pharmaceutical Companies Segment Accounted Significant Market Share

Biopharmaceutical and pharmaceutical companies extensively use single-use assemblies and consumables, including aseptic bottle transfers, single-use manifolds, and custom tube kits, to streamline the upstream process. The amount of money spent on research and development by biopharmaceutical and pharmaceutical firms has increased to a large extent.

The rising adoption of single-use assemblies in biopharmaceutical manufacturing is expected to further drive this segment's growth. A study published in Wiley Online Library shows that using single-use assemblies has become essential in biopharma processing research, scale-up, and commercial biomanufacturing. Therefore, the importance of single-use assemblies in biopharmaceutical and pharmaceutical research is expected to drive segment growth due to increased adoption.

In addition, the key market players' rising initiatives by expanding their services are expected to drive market growth. For instance, in September 2022, Merck strengthened its manufacturing capabilities for single-use assemblies to produce Covid-19 vaccines and other lifesaving therapies by investing more than EUR 130 million in Molsheim, France. Such initiatives are expected to drive segment growth due to the increased adoption of single-use assemblies by pharmaceutical and biopharmaceutical companies in developed nations.

Additionally, the increasing per capita healthcare expenditure in the countries is expected to increase the accessibility of innovative drugs. Hence, companies are spending more on the research and development of drugs due to their increasing demand. Thus there is a rising need for single-use assemblies in pharmaceutical and biopharmaceutical companies.

Therefore, factors such as the rising adoption of single-use assemblies in biopharmaceutical research and rising investments from the key market players are expected to drive the growth of the biopharmaceutical and pharmaceutical companies segment at a significant pace over the forecast period.

North America Holds a Significant Market

The factors accounting for the significant share of the market include the well-established biopharmaceutical sector, widespread availability of single-use assemblies supplied by regional market leaders, and rising biologics and biosimilar manufacturing.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

The supportive domestic environment and sophisticated biopharmaceutical and pharmaceutical sectors in the United States contribute a significant share of the single-use assembly market.

In July 2021, Cytiva and Pall Corporation invested USD 1.5 billion to meet the growing demand for biotechnology solutions. This expansion will increase the manufacture of essential products used to make biological medicines, such as single-use technologies, including bioreactor bags for growing cells used to create personalized medication and syringe filters for scientific research. Such investments are further expected to drive the growth of the market studied in North America due to the rise in the adoption of single-use assemblies to manufacture biologics.

Furthermore, according to the Canadian Institute for Health Information 2022, the total healthcare expenditure was increasing in Canada and was USD 3,08,043 million in 2021. Such a significant expenditure on healthcare in Canada is expected to drive the growth of the market studied as there would be increasing spending on innovative drugs, leading to increasing pharmaceutical and biopharmaceutical research, thereby raising the adoption of single-use assemblies.

Therefore, factors such as rising R&D expenditure and advancements in healthcare, among others, are expected to drive market growth in North America.

Single-Use Assemblies Market Competitor Analysis

The single-use assembly market is moderately competitive and consists of many significant players. In terms of market share, a few major players dominate the market. The market is driven by factors such as the rising launch of single-use assemblies, increased research and development adoption, and pharmaceutical manufacturing. Some companies operating in the market are Sartorius AG, Thermo Fisher Scientific, Danaher Corporation, Merck KGaA, Avantor Inc., Parker Hannifin Corporation, and Saint-Gobain.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions & 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 Rapid Implementation and Low Risk of Cross-contamination

4.2.2 Increasing R&D Investment by Biopharmaceutical Companies

4.2.3 Growing Biologics Market

4.3 Market Restraints

4.3.1 Issues Related to Extractables & Leachables

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

4.4 Industry Attractiveness - Porter's Five Forces Analysis

4.4.1 Threat of New Entrants

4.4.2 Bargaining Power of Buyers

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 Product Type

5.1.1 Filtration Assemblies

5.1.2 Bag Assemblies

5.1.3 Bottle Assemblies

5.1.4 Mixing System Assemblies

5.2 By Application

5.2.1 Cell Culture and Mixing

5.2.2 Filtration

5.2.3 Storage

5.2.4 Sampling

5.2.5 Fill-finish Application

5.2.6 Other Applications (Aseptic Transfer and Fluid Management)

5.3 By End-user

5.3.1 Biopharmaceutical and Pharmaceutical Companies

5.3.2 Contract Research and Contract Manufacturing Organizations

5.3.3 Academic and Research Institutes

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

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 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
 - 6.1.2 Sartorius AG
 - 6.1.3 Danaher (Pall Corporation)
 - 6.1.4 Merck KGaA
 - 6.1.5 Avantor
 - 6.1.6 Lonza
 - 6.1.7 Parker Hannifin Corporation
 - 6.1.8 Saint-Gobain
 - 6.1.9 Repligen Corporation
 - 6.1.10 Corning Incorporated
 - 6.1.11 Entegris
 - 6.1.12 Antylia Scientific (Cole-Parmer)

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

**Single-Use Assemblies Market - Growth, Trends, Covid-19 Impact, and Forecasts
(2023 - 2028)**

Market Report | 2023-01-23 | 110 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-02"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

