

Global Continuous Bioprocessing - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Global Continuous Bioprocessing Market size is estimated at USD 201.81 million in 2024, and is expected to reach USD 574.41 million by 2029, growing at a CAGR of 23.27% during the forecast period (2024-2029).

In recent times, countries have faced a huge threat of COVID-19. As per the World Health Organization (WHO), coronavirus disease is an infectious disease, and most people infected with the COVID-19 virus will experience mild to moderate respiratory illness. Most pharmaceutical and biotechnological companies have reallocated their resources in research and development (R&D) departments toward identifying new molecules or leads for the treatment of COVID-19. This has impacted the research and development activities of biopharmaceuticals for other chronic diseases. In the early phase of the pandemic, due to the lockdown measures, trade restrictions, and high infection rate, many pharmaceutical and biotechnology companies were hit, and their work was impacted, especially R&D activities, as the clinical and other types of trials were delayed by more than six months.

According to the study 'Impact of COVID19 on Operational Activities of Manufacturing Organizations-A Case Study and Industry 4.0-Based Survive-Stabilise-Sustainability (3S) Framework,' published in March 2021, restrictions imposed by local authorities have had the highest impact on operational activities, followed by unavailability of transport and unavailability of workers; scarcity of raw materials increased workload and decrease in working days have had a significant impact on the biopharmaceutical organizations. Increase in machine failures, overproduction, and insufficient production to fulfill demand, also had an impact on operational activities, thus leaving a significant impact on the market.

The factors propelling the studied market growth are the growing adoption of continuous processing, increasing technological advancements in the continuous processing space, and increasing demand for biopharmaceuticals. Along with it, increasing investments and government initiatives boosting biomanufacturing will also contribute positively to market growth.

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Continuous bioprocessing is being readily adopted as one of the future forms of biomanufacturing production because it operates on the same scale in both clinical production and commercialization, using flexible infrastructure that can respond quickly to changing market pressures. The use of flexible infrastructures such as single-use flow paths and small surgical vessels with the same bioreactor size will reduce significant investment while making technology transfer operations easier and maintaining quality profiles. Additionally, the rising burden of chronic diseases such as cancer, neurological disorders, cardiovascular diseases, rare diseases, and others will propel the demand for biopharmaceuticals, thereby driving the continuous bioprocessing market. For instance, as per the 2020 statistics by GLOBOCAN 2020, an estimated number of 19,292,789 people were diagnosed with cancer in 2020. As per the same source mentioned above, the number of people suffering from cancer is estimated to reach 30.2 million by 2040. Thus, the growing burden of cancer globally will significantly increase the demand for biosimilars, thus driving the market.

Moreover, rising investments in the studied market will also lead to lucrative growth of the market. For instance, in September 2021, Gamma Biosciences made a strategic investment in Nirrin Technologies, a provider of next-generation sensors and analytics for real-time, in-process monitoring and analysis in upstream and downstream bioprocessing applications and continuous processing for the biopharma and life science industries. However, strict regulations for continuous bioprocessing and high equipment costs are expected to hinder the market growth.

Continuous Bioprocessing Market Trends

Research and Development Segment is Expected to Account for the Largest Market Share During the Forecast Period

The research and development segment is expected to grow significantly during the study period due to the increasing research and development expenditure, rising demand for biopharmaceuticals, the establishment of new facilities, and technological advancements in the segment.

For instance, in March 2021, Transcenta announced a breakthrough in its continuous perfusion cell culture platform by achieving volumetric productivity of over 6 g/L per day while maintaining process and product quality attributes in a state of control for a 4-week culture. This productivity improvement represents a 15-fold increase in drug substance output per year as compared to the same cell line in the conventional fed-batch process. This can increase the productivity of single-use bioreactors by approximately 130 kg or 1.3 metric tons of total drug substance per year. Thus, such advancements and increasing productivity through continuous bioprocessing will lead to lucrative growth of the market.

Furthermore, in March 2021, The United States Pharmacopeia (USP) and Phlow Corp. collaborated to build a new laboratory that will develop test methods and standards for continuous manufacturing. This establishment is focused on product development, tech transfer, and drug application filings using continuous manufacturing to foster wider adoption of continuous manufacturing by generic drugs and other pharmaceutical manufacturers. Moreover, the establishment of continuous biomanufacturing facilities which are focused on research and development activities will also contribute to the market growth. Thus, due to the above-mentioned factors, the studied segment is expected to contribute to the significant growth of the market.

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

The primary driving factors for the growth of the North American continuous processing markets are the increasing burden of chronic diseases, product launches, key strategic initiatives by market players, the establishment of continuous bioprocessing facilities, and technological advancement in the studied market.

The United States within North America is expected to hold a significant share of the studied market during the study period. For

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instance, according to the estimates of the 2022 American Cancer Society, Inc., about 236,740 new cases of lung cancer will be diagnosed in the country in 2022. The same source also states that 79,000 new cases of kidney cancer and 13,920 deaths will be reported in 2022 from Kidney cancer. The high burden of cancer is expected to boost the demand for biosimilar and other biopharmaceuticals, thus driving the continuous bioprocessing market.

In March 2022, Phlow Corp., a U.S.-based essential medicines public benefit company, entered into strategic alliances with both Virginia Commonwealth University's (VCU) Medicines for All Institute and AMPAC Fine Chemicals to provide contract continuous manufacturing research and development (R&D) services for small molecule pharmaceutical products. Such partnerships will ramp up the operation of continuous manufacturing facilities, thus, driving the market.

The study 'A Comparative Investment Analysis of Batch Versus Continuous Pharmaceutical Manufacturing Technologies,' published in January 2022, suggested that continuous manufacturing has the potential to make manufacturing of oral solid dosage pharmaceuticals more economically attractive in the country than foreign manufacturing of those products. Thus, studies indicating the economic benefits in the US will boost the continuous manufacturing process in the country, which will significantly contribute to the market growth. Therefore, due to the above-mentioned factors, the studied market is expected to lead to lucrative growth in the market.

Continuous Bioprocessing Industry Overview

The continuous bioprocessing market is fairly competitive and consists of several major players. In terms of market share, a few of the major players are currently dominating the market. Some of the companies which are currently dominating the market are 3M, Thermo Fisher Scientific, Merck KGaA, Sartorius AG, Eppendorf SE, and others.

Additional Benefits:

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

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