

Laboratory Filtration - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Laboratory Filtration Market size is estimated at USD 3.77 billion in 2024, and is expected to reach USD 5.31 billion by 2029, growing at a CAGR of 7.12% during the forecast period (2024-2029).

The outbreak of COVID-19 has impacted the laboratory filtration market. The increasing demand for vaccine development and manufacturing during the pandemic has increased the adoption of laboratory filtration. Various filtration techniques are used for the manufacturing of vaccines. For instance, according to the NCBI research study published in April 2021, new purification and filtration methods were streamlined for vaccine manufacturing to scale up production during the COVID-19 pandemic. The same source also stated that researchers at Michigan Technological University created new processes to improve the purification and filtration step, which accounts for 50.0% to 70.0% of a vaccine's manufacturing costs. Laboratory filtration equipment is an essential requirement for carrying out vaccine filtration procedures. Thus, such an increase in initiatives favoring vaccinations may increase vaccine production, which in turn may propel the demand for laboratory filtration. Therefore, the pandemic positively impacted the market and is expected to continue the upward trend over the forecast period.

The launch of new, transforming, and innovative technology in lab filtration, an increase in initiatives favoring vaccinations, favorable patient demographics, and growing vaccinations of newborns and children are the major drivers for the market. For instance, in October 2021, the 'Tika Express program was launched to speed up vaccination in VisakhaAgency. The mobile vans carried the health staff to far-flung areas, where vaccines are administered to people on the spot by organizing camps. Additionally, in August 2022, National Immunization Awareness Month was conducted to raise awareness about how important vaccination is to prevent chronic and fatal diseases. Furthermore, in November 2022, Touchligh is furthering the pre-clinical development of its proprietary doggybone DNA vaccine platform. Its latest research is financed by a new grant from the Bill & Melinda Gates Foundation. The Bill & Melinda Gates Foundation awarded Touchlight USD 2.4 million in funding to further the

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preclinical development of its doggybone DNA vaccine platform. Such an increase in initiatives favoring vaccinations may increase vaccine production, propelling the demand for laboratory filtration. Thus, considerable market growth is expected over the forecast period.

The favorable patient demographics and growing vaccinations of newborns and children are also driving the market growth. For instance, according to data published by the American Academy of Pediatrics, in March 2022, more than 1 million people in the United States have long-term hepatitis B infections, and people who are infected with hepatitis B as a baby have a 90% chance of developing serious, chronic conditions like liver cancer in their lifetime. As per the same source, chickenpox infects 4 million people in the United States every year. More than 10,000 were hospitalized, and more than 100 died. A mild case can cause a child to miss school for a week or more. Additionally, the polio virus is still circulating outside the United States, and unvaccinated children are at risk. To overcome and reduce morbidity, mortality, and economic toll, there is a growing vaccination for newborns and children, which is expected to accelerate the manufacturing rate of vaccines. Since laboratory filtration is an essential step for vaccine manufacturing, thus increasing rate of vaccine manufacturing is expected to propel the demand for laboratory filtration, thereby surging the market growth.

However, the reuse of sterilizing-grade filters and the high cost of specialized filters is likely to impede the market growth over the forecast period.

Laboratory Filtration Market Trends

Ultrafiltration Segment is Expected to Witness Significant Growth Over the Forecast Period

Ultrafiltration is the process of separating extremely small particles and dissolved molecules from liquids. The primary basis for separation is the size of the molecules, although the permeability of the filter can be affected by the sample's chemical, molecular or electrostatic properties. To be separated by ultrafiltration, molecules must differ in size by at least an order of magnitude and have a molecular weight between 1 kDa and 1000 kDa. Ultrafiltration membranes can be used to clean the filtrate or collect the retentate. It is typically used to separate proteins from buffer components for buffer exchange, concentration, or desalting.

The advantages and wide applicability of ultrafiltration, such as protein purification and isolation, vaccine manufacturing, and increased investments in research and development, are the major drivers for segment growth. For instance, according to the NCBI research study published in January 2021, proteins could be beneficial in their concentrated products or isolates, of which membrane filtration methods such as ultrafiltration include application in a wide range of protein sources. Furthermore, the advantages of ultrafiltration technology, such as the high product throughput and ability to generate rapid results, also boost the use of ultrafiltration. Moreover, traditional techniques such as chromatography require complex instrumentation support to run efficiently and yield low throughput of product at an extremely high cost owing to which ultrafiltration technique is becoming more popular as it overcomes such disadvantages.

The increased demand for vaccines is also anticipated to propel the segment's growth. For instance, in February 2022, Union Minister for Health and Family Welfare Dr. Mansukh Mandavia launched the National Polio Immunization Drive for 2022 in India by administering polio drops to children below five years of age in the Ministry of Health and Family Welfare. Thus, increased demand for vaccines is expected to surge vaccine production, propelling segment growth as vaccine ultrafiltration is one of the essential steps in the production and manufacture of vaccines. Therefore, the advantages of ultrafiltration, wide applicability, and increased vaccine production are anticipated to propel the segment growth over the forecast period.

North America is Expected to Witness Considerable Growth Over the Forecast Period

North America is expected to witness considerable growth over the forecast period. The growth is due to increasing research

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work and rising investments in research and development by the public and private sectors. For instance, as per the report published by Research America in January 2022, the estimated Medical and Health R&D Investment in the United States was more than USD 245,127 million in 2021, whereas in 2020, it was around USD 221,438 million. It also reported that the investment in R&D by industrial players has also increased from the previous years. In 2021, the investment by industry was more than USD 161,766 million, whereas, in 2020, it was around USD 148,205 million. Therefore, increased investment indicates that both public and private sectors are focusing on developing new and advanced products, which may create new opportunities for the laboratory filtration market. Therefore, these factors are anticipated to promote market growth in North America.

The key product launches, high concentration of market players or manufacturer's presence in the region, and acquisition & partnerships among major players are the major drivers for the market. In addition, increased investments by biopharmaceutical companies in R&D in the United States are also driving the growth of the laboratory filtration market in the country. For instance, in October 2021, the United States National Institute for Innovation in Manufacturing Biopharmaceuticals (NIIMBL) approved a USD 3.0 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. Further, 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 combines high flow rates with reliability. Therefore, owing to increased investments in research and development and product launches in the country, considerable market growth is expected in the United States over the forecast period.

Laboratory Filtration Industry Overview

The Laboratory Filtration Market competition is set to intensify, as several key players are focusing on the expansion of their laboratory filtration portfolio through acquisition and collaboration with companies. The market studied is expected to open up several opportunities for new players, as well as currently established market leaders. The competitive landscape includes an analysis of a few international and local companies that hold market shares and are well known, including 3M Company, Merck KGaA, Danaher Corporation (Pall Corporation), Sartorius Group, and GVS S.p.A among others.

Additional Benefits:

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

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