

## **Global Downstream Processing - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The Global Downstream Processing Market size is estimated at USD 40.78 billion in 2025, and is expected to reach USD 75.47 billion by 2030, at a CAGR of 13.1% during the forecast period (2025-2030).

The initial phase of the pandemic has had a substantial impact on the growth of the single-use bioprocessing market owing to the significant decline in manufacturing processes and restricted demand and supply of drugs. With the increasing number of COVID-19 cases, the demand for effective drugs and vaccines were increased which has increased the adoption of downstream processing systems and technology by biopharmaceutical companies due to fewer chances of contamination and reduced sterilization tests between the batches. This impacted the market growth during the pandemic.

The factors attributing to the market growth are the increasing demand for the biotechnology sector globally, rising research and development expenditure in biopharmaceutical companies, and an increase in the prominence of contract manufacturing companies.

With the increasing pharmaceutical spending on research and development, adoption of various business strategies, and advanced technology, downstream processing is being increasingly adopted in the biopharmaceutical industry, boosting market growth over the forecast period. According to the data published by the Congressional Budget Office, in 2021, it has been observed that pharmaceutical industries have spent nearly USD 200 billion on research and development in 2020 globally compared to USD 83 million in 2019. Thus, the increasing investment in research and development by the companies further increases the capabilities of the company to adopt innovative bioprocess technologies, resulting in the adoption of continuous downstream processing systems for multicomponent separations, perfusion chromatography systems, high-throughput process development, and high-resolution membrane systems, thereby increasing market growth.

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Several advantages offered by downstream processing, such as high efficiency, reduce costs, and generally dominated by chromatographic separations and membrane filtrations are also contributing to the market growth.

Also, the rising utilization of filters in assessing viral inactivation is expected to increase the market growth. For instance, according to an article published in May 2020, titled 'Approaches to Purification, Analysis, and Characterization of Antibody-Based Therapeutics', it has been observed that the final two steps of downstream processing for antibodies often involve the two fundamental biopharmaceutical production technologies of virus filtration and ultrafiltration. Additionally, with current developments like continuous processing and increased monoclonal antibody (mAb) concentrations, virus filters have developed to better meet the needs of the biopharmaceutical industry. Furthermore, as per the same source, parvovirus-retentive filters are now utilized for the development of new mAb processes. Thus, the increased usage of virus filters in the production of antibodies and related biotherapeutics and recent advances in the use of filters is expected to increase the demand for downstream processing which in turn is anticipated to boost the market growth.

However, the high cost of instruments and purification bottleneck are expected to restrain the market growth over the forecast period.

### Downstream Processing Market Trends

#### Antibodies Production is Expected to Dominate the Downstream Processing Market During the Forecast Period

The antibodies segment is expected to witness significant growth in the downstream processing market over the forecast period owing to the factors such as rising demand for antibiotics for the treatment of several disorders, and growing demand for monoclonal antibodies. For instance, according to an article published in August 2022, titled 'Recent Advances and Future Directions in Downstream Processing of Therapeutic Antibodies', continuous and semi-continuous downstream processes are being investigated as alternatives to batch processes due to the increased adoption of perfusion methods for antibody production. In addition, the development of downstream processes is increasingly using statistical and mechanistic modeling techniques, which allows for a deeper knowledge of chromatographic unit activities.

In addition, antibiotic resistance is on the rise, which increases the demand for developing antibodies that act against resistant strains. This is expected to increase the adoption of downstream processing in antibody production, thereby fueling market growth.

Furthermore, the rising company activities for developing products for efficient purification of antibodies are also contributing to the market growth. For instance, in January 2021, Cytiva launched HiScreen Fibro Prisma for early monoclonal antibody (mAb) purification process development. The Fibro technology uses an open porous adsorbent material made of cellulose fibers for efficient mass transfer. The Fibro technology enables rapid cycling chromatography which accelerates research and process development and boosts output in large-scale manufacturing.

Thus, owing to the aforementioned factors, the market is expected to grow significantly during the forecast period.

#### North America Dominates the Market and Expects to do Same Over the Forecast Period

North America is expected to hold a significant market share in the downstream processing market owing to the factors such as the increasing adoption of downstream bioprocessing in antibodies production in the industry, rising government initiatives in promoting bioprocess technologies, and the presence of a well-established healthcare infrastructure.

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The rising government funding and investment for advancing the manufacturing process in biopharmaceutical industries are also contributing to market growth. For instance, in July 2021, the National Institute for Innovation in Manufacturing Biopharmaceuticals (NIIMBP) received two grants totaling USD 153 million from the National Institute of Standards and Technology (NIST) of the United States Department of Commerce. Also, as part of the American Rescue Plan, the National Institute of Standards and Technology (NIST) gives NIIMBL USD 83 million over three years to assist in research and development aimed at halting, preparing for, and responding to coronavirus epidemics.

The rising company activities and increasing focus on adopting various business strategies such as a merger, acquisition, and expansion of the facility to withhold their position in the market are also contributing to the market growth. For instance, in April 2022, Merck entered into an agreement with Wuxi National High-tech Industrial Development Zone. Under the agreement, Merck expands its single-use manufacturing center in Wuxi, East China's Jiangsu province. Also, in March 2022, Thermo Fisher Scientific Inc., invested USD 97 million to expand its clinical research operations in Richmond, Virginia. The facilities support increasing demand across biopharma for consistent, high-quality laboratory services to accelerate drug development. Similarly, in April 2021, Thermo Fisher Scientific launched the HyPeak chromatography system, a single-use chromatography system for bioprocessing, with significant functions in therapeutic protein as well as vaccine development.

Thus, owing to the aforementioned factors, the market is expected to grow significantly during the forecast period.

### Downstream Processing Industry Overview

The downstream processing market is highly fragmented with the presence of a considerable number of companies that are significantly contributing to the market growth. The market players are investing massive amounts to transform their product lines in the market. Likewise, with varying technology the need for better technology infrastructures are rising, to cater to the need of the customers, market participants are continuously inventing new products. Some of the key players in the market are Lonza Group, Thermo Fisher Scientific Inc., Danaher Corporation, Sartorius Stedim Biotech S.A., Merck KGaA (Merck Millipore), 3M Company, and Eppendorf AG.

### Additional Benefits:

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

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