

# Single-Use Technologies for Biopharmaceuticals: Global Markets

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- The global market for single-use technologies for biopharmaceuticals is expected to grow from \$6.5 billion in 2024 and is projected to reach \$11.2 billion by the end of 2029, at a compound annual growth rate (CAGR) of 11.6% during the forecast period of 2024 to 2029.
- The North American market for single-use technologies for biopharmaceuticals is expected to grow from \$2.0 billion in 2024 and is projected to reach \$3.4 billion by the end of 2029, at a CAGR of 10.6% during the forecast period of 2024 to 2029.
- The Asia-Pacific market for single-use technologies for biopharmaceuticals is expected to grow from \$1.8 billion in 2024 and is projected to reach \$3.3 billion by the end of 2029, at a CAGR of 13.3% during the forecast period of 2024 to 2029.



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# Chapter 1: Executive Summary

## Market Outlook



**MARKET SIZE**

The global single-use technologies for biopharmaceuticals market was valued at \$REDACTED billion in 2023, and is expected to reach \$REDACTED billion at the end of 2029.



**MARKET GROWTH**

The global single-use technologies for biopharmaceuticals market is expected to grow at a compound annual growth rate (CAGR) of REDACTED% from 2024 through 2029.



**LARGEST MARKET REGION**

REDACTED accounted for REDACTED% of the market in 2023.



**MARKET DRIVERS/OPPORTUNITIES**

- Growing demand for personalized medicine.
- Increasing product launches.
- Growing adoption for monoclonal antibodies manufacturing.
- Single-use systems in downstream operations.



**MARKET RESTRAINTS/CHALLENGES**

- Stringent regulations and validation requirements.
- Disposal of plastic waste.
- Integration challenges.



**ESG TRENDS**

- The biopharmaceutical single-use technologies industry's ESG goals are focused on reducing carbon footprint, improving healthcare access and creating sustainable supply chains.



### EMERGING TECHNOLOGIES

- Real-time monitoring (RTM) of operations.
- Miniaturization of bioreactor systems.
- Integration of automation and robotics.



### LEADING COMPANIES

- Sartorius AG.
- Danaher Corp.
- Merck KGaA.
- Thermo Fischer Scientific Inc.
- Eppendorf SE.

Source: BCC Research

## Scope of Report

This report summarizes the single-use technologies market, including a market snapshot and company profiles of key players. It provides a comprehensive market breakdown with in-depth information regarding each segment. The overview section of the report describes market trends and dynamics, including drivers, challenges and opportunities for the market. It provides information on emerging technologies and developments in the industry. It analyzes critical market players' financials, product portfolios and recent activities.

BCC Research analyzed and made projections of each market and its applications, along with forecasts for the next five years. The report also features profiles of leading companies in the biopharmaceutical single-use technologies industry, including Sartorius AG, Danaher Corp, Merck KGaA and Thermo Fisher Scientific Inc.

The market is segmented by geographical region into North America, Europe, Asia-Pacific and the Rest of the World (RoW). Regional analysis is further broken down by country as:

- North America: The U.S., Canada and Mexico.
- Europe: Germany, the U.K., France, Italy, Spain and the Rest of Europe.
- Asia-Pacific: China, Japan, India, South Korea, Australia and the Rest of Asia-Pacific.

Data for market estimates have been provided for 2021 and 2022 as the historical years, 2023 as the base year and forecast through 2029.

## Market Insights

In 2023, the global market for single-use technologies for biopharmaceuticals was valued at \$REDACTED billion. The market is forecast to grow at a compound annual growth rate (CAGR) of REDACTED% to reach \$REDACTED billion at the end of 2029.

The increasing demand for personalized medicine and the growing number of single-use product launches in bioprocessing operations drive the market’s growth. The integration challenges and regulatory validation requirements challenge the market’s growth.

This report segments the global market by technology type, component type, application, end user and region. By technology type, REDACTED held the REDACTED market share in 2023, and this segment is expected to grow at a CAGR of REDACTED% during the forecast period.

In terms of application, the REDACTED segment is forecast to grow at a CAGR of REDACTED% during the forecast period. This segment accounted for REDACTED% of the market in 2023, reaching a value of \$REDACTED billion through 2029.

The REDACTED segment accounted for REDACTED% of the market by component type in 2023. It is expected to grow at a CAGR of REDACTED% during the forecast period, reaching a value of \$REDACTED billion by the end of 2029.

REDACTED held the REDACTED regional market share with REDACTED% in 2023. Increasing research and development (R&D) activities in cell and gene therapies and the significant regional presence of single-use systems companies are responsible for the large share.

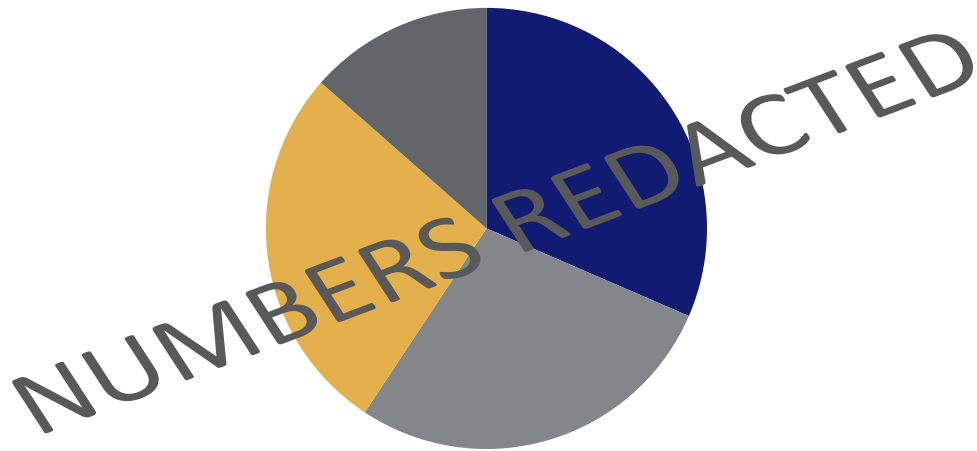
Leading companies in the global market include Danaher Corp, Thermo Fisher Scientific Inc., Sartorius AG and Merck KGaA.

Summary Table:  
Global Market for Single-Use Technologies for Biopharmaceuticals, by Region,  
Through 2029  
(\$ Millions)

Region	2021	2022	2023	2024	2029	CAGR% 2024-2029
North America	1,501.1					
Asia-Pacific	1,259.3					
Europe	1,301.4					
RoW	619.6					
Total*	4,681.3					

Source: BCC Research

Summary Figure  
Global Market Shares of Single-Use Technologies for Biopharmaceuticals,  
by Region, 2023  
(%)



Source: BCC Research

## *About BCC Research*

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- Biotechnology and pharma companies.
- Contract development and manufacturing organizations (CDMOs)
- Life Sciences products and service providers
- Universities and Research Institutions.
- Venture capitals and other investors.

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**BCC Research Team** possesses expertise and experience in life and physical science domains. They specialize in offering valuable business insights, including industry analysis, competitor intelligence, strategic and financial analysis, and opportunity assessment. The team has in-depth knowledge of various sectors, including healthcare, biotechnology, pharmaceuticals, IT, automation, advanced materials, and energy. They are proficient in qualitative and quantitative market intelligence providing clients with actionable insights. With a vast understanding of the competitive landscape, the team can support clients in making data-driven decisions to help them achieve a competitive edge in their respective markets.

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