

#18-008 Report Overview



# Bioprocessing 2018 Market Analysis & Perspectives Report

September 2018



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# Bioprocessing 2018 Market Analysis & Perspectives

## Overview

Bio-manufacturing instruments and techniques have become influential in everything from generating high yield pharmaceutical precursors, to biofuel conversion from biomass.

Bioprocessing — the use of living organisms to create practical products and solutions — is currently being impacted by three ongoing trends in the industry: the emergence of continuous processing, the move towards single-use technologies and the focus on improved process productivity. This report specifically delves into different types of bioreactors, cell culture and media and supplements, filtration, and process chromatography, covering both upstream and downstream processes. Moving towards these goals has created many opportunities in a market that was over \$8 billion in 2017.

## Objectives of a Market Analysis & Perspective Publication

1. Provide subscribers with a detailed and concise global perspective of both upstream and downstream processes and what can aid continuous processing
2. Provide the reader with valuable market figures and representations using secondary sources
3. Reference for corporate planning, strategic marketing, business valuation, acquisition due diligence, and other business activities

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# Bioprocessing 2018 Market Analysis & Perspectives

## ■ Report Contents

### Introduction

- Background
- Executive Summary (Market Demand)
- Executive Summary (End-User Perspectives)
- Scope and Definitions
- Methodology

### Technology Overview

- Bioreactors
- Cell Culture Media and Supplements
- Filtration and Concentration
- Process Chromatography

### Recent Developments

### Market Demand

- Overall
- Bioreactors
  - Benchtop-Scale, Pilot-Scale, Production-Scale
  - Process Control, Sensors
  - Conventional, Single-use
- Cell Culture Media and Supplements
- Filtration and Concentration
- Process Chromatography
  - HPLC, LPLC, Membrane Adsorbers

### End-User Perspective

- Survey Demographics
- Bioprocessing Usage
- Pharma/Bio Production
- Bioprocess Instruments
- Vendors- Upstream Bioprocessing
- Vendors- Downstream Bioprocessing
- Budget

### Appendix

- End User Questionnaire

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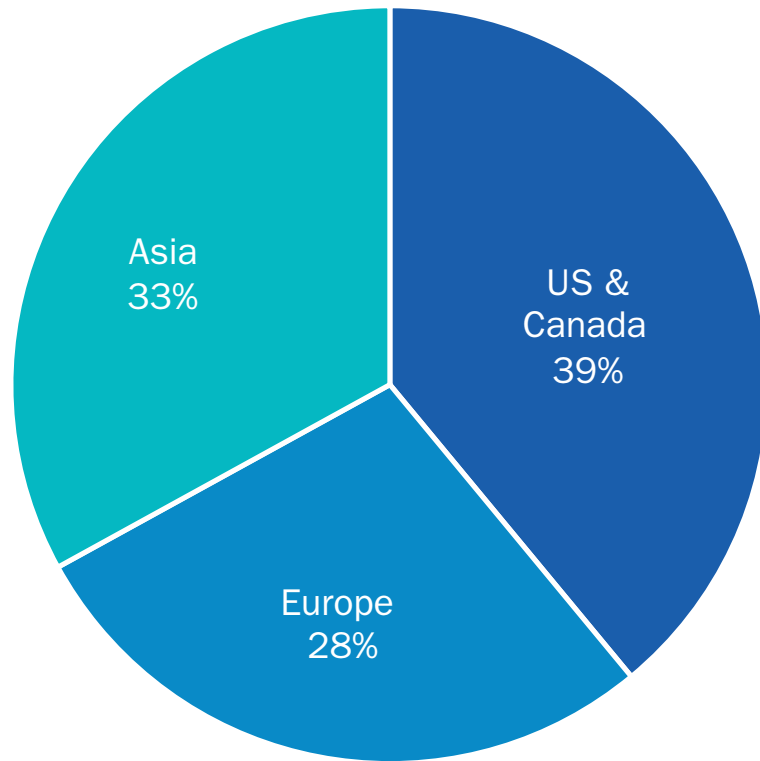
## ■ Methodologies

SDi provides detailed information on both the upstream and downstream phases of bioprocessing, how demand is distributed across industries and regions, and how the market will change in the future. The results of a **38-question** online survey of **more than 200 bioprocess end-users** from around the world is included, which provides substantive information on customer trends and opinions in the market. In addition, this report also includes an in-depth analysis of vendor shares in each area of the market. This report is the most accurate, detailed and concise market research document on the bioprocess market available anywhere.

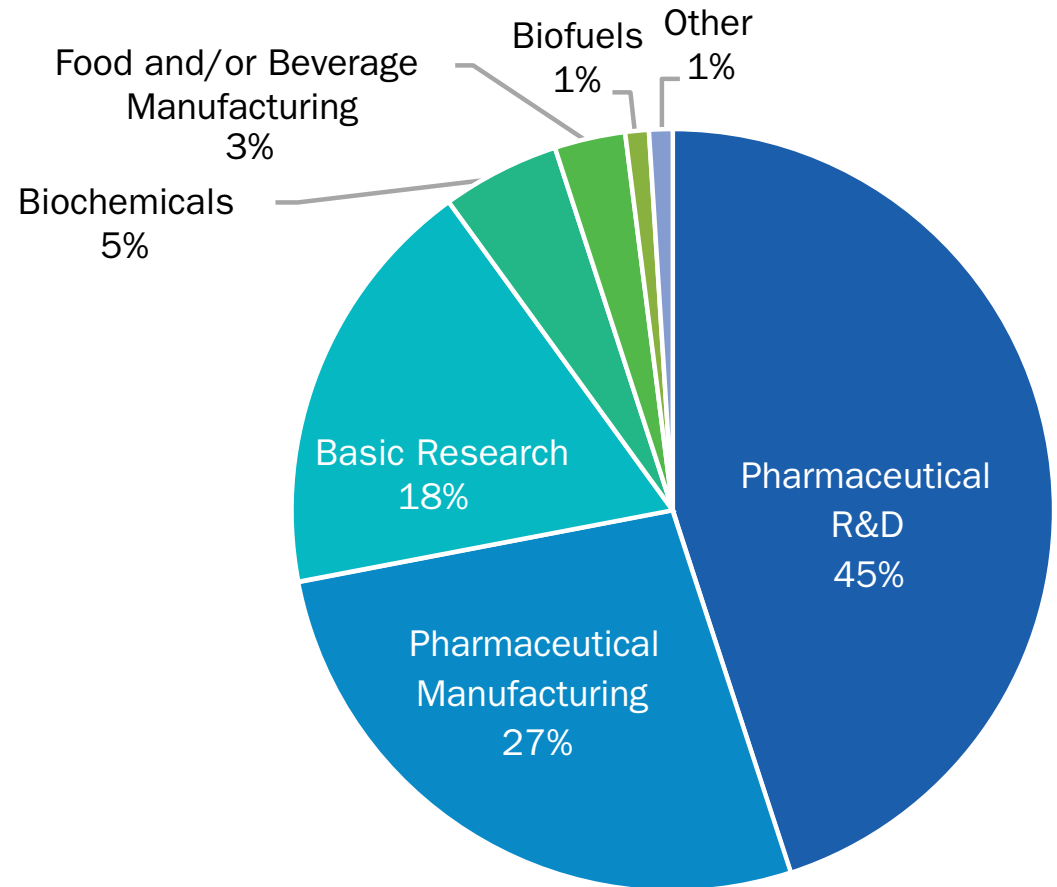
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## Sample Data

DEMOGRAPHICS



USAGE: ORGANIZATION FUNCTIONS (N=212)

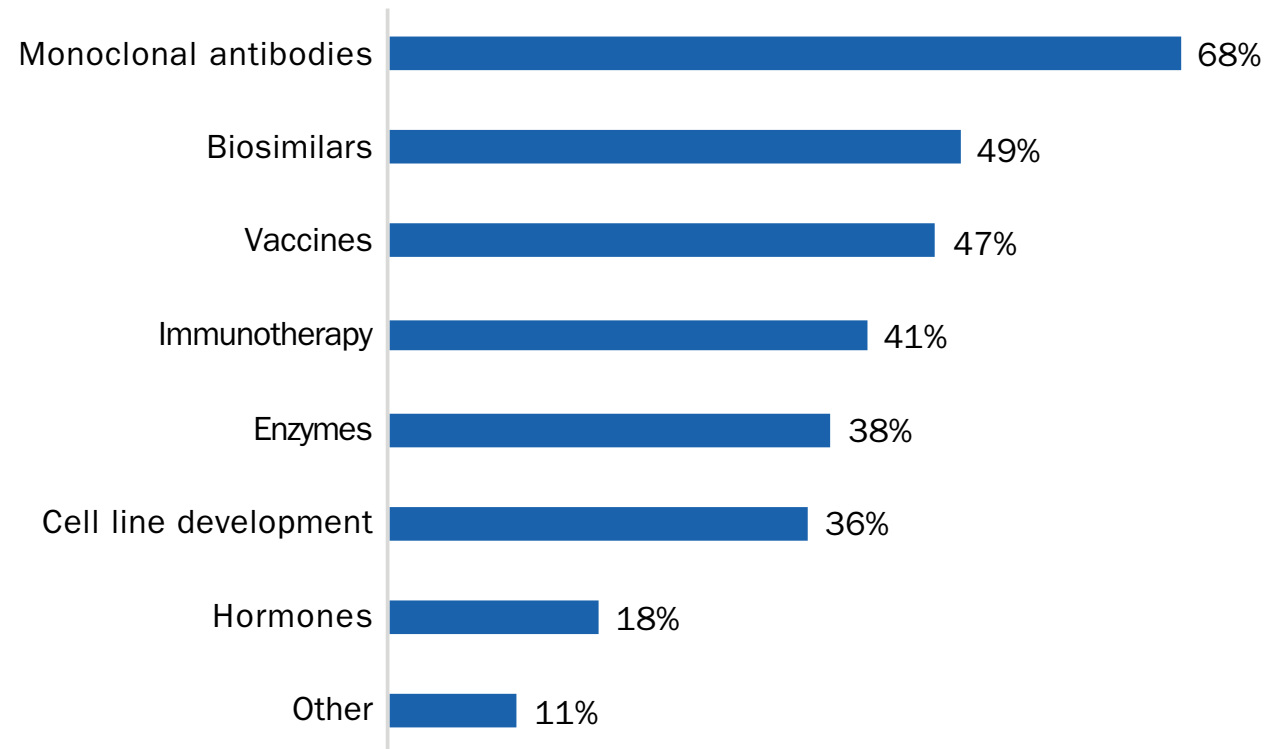


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WHICH OF THE FOLLOWING DOES YOUR ORGANIZATION RESEARCH OR PRODUCE USING BIOPROCESSING?

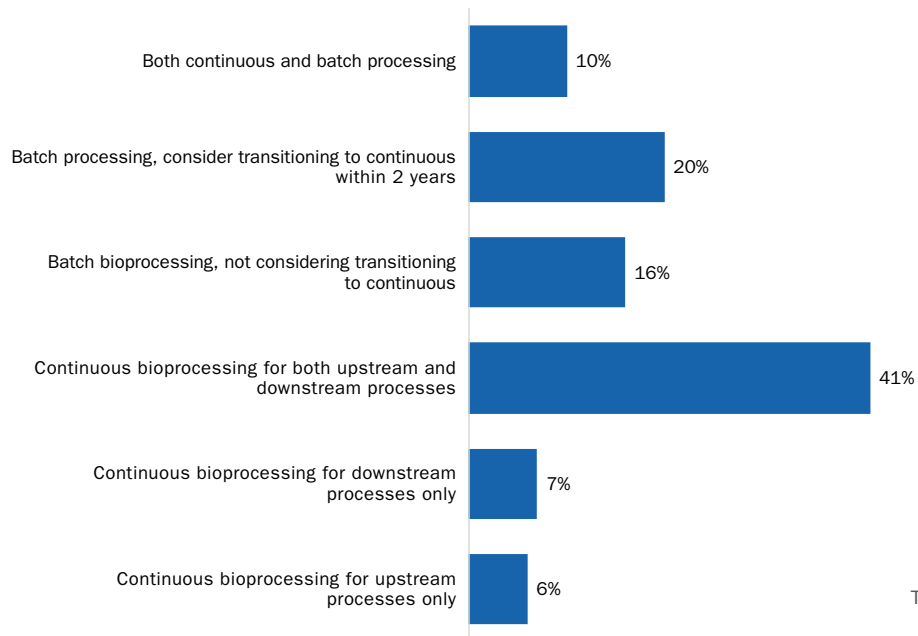


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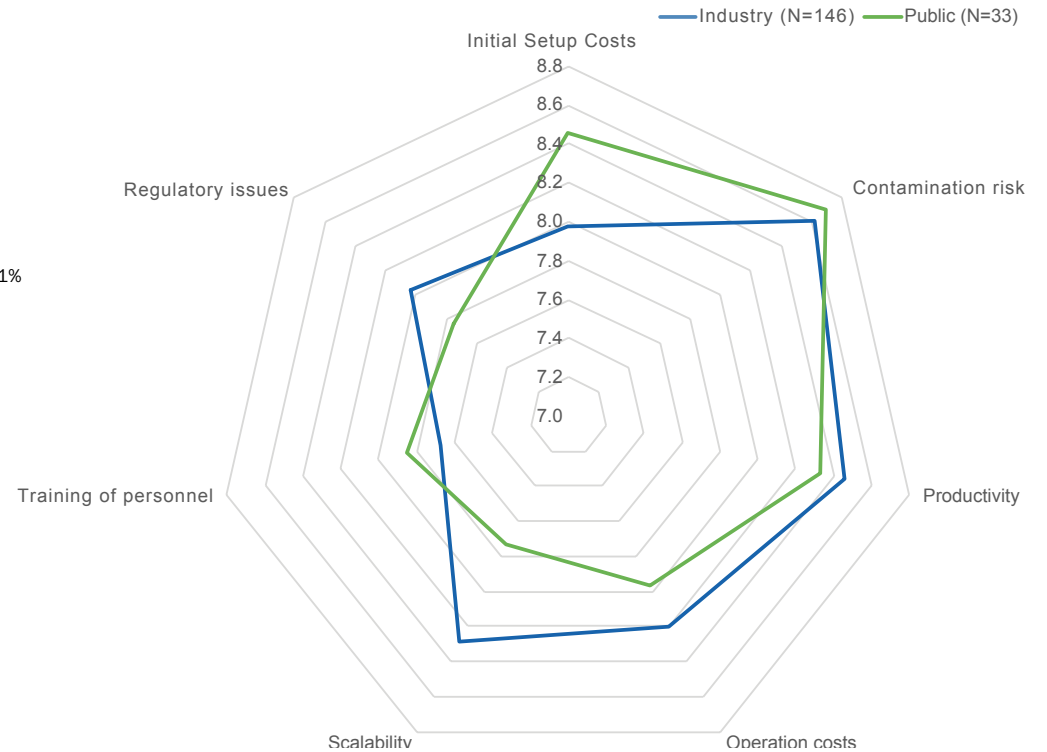
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## HOW DO YOU USE CONTINUOUS BIOPROCESSING?



## MOST IMPORTANT CONSIDERATIONS TO TRANSITION TO CONTINUOUS BIOPROCESSING





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### Developed by a Team of Experts

Our questionnaires are developed by a multidisciplinary team of scientists, industry veterans and market research experts with years of experience. These professionals understand that survey questions need to be asked in a way that ensures the answers will directly address the business challenges you face. Once the surveyed data is collected, this same team creates a unique report that presents the reader with a thorough understanding of the topic, and the scientific and business implications of the results based on sophisticated statistical analytics.

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## Carefully Selected Survey Participants

When others promote results from their online surveys, they fail to mention the uncontrolled nature of their broadcast email invitations. To provide you with the most valid and accurate results possible, the respondents to our surveys are members of our unique online panel – The Science Advisory Board® - which consists of thousands of verified life science and biomedical professionals who have agreed to take part in our surveys, focus groups and other market research activities. These respondents are carefully selected based on their professional qualifications, market segments and geographic regions. We can even select them based on the products they use and their preferred suppliers.

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## **About Strategic Directions International**

part of Science and Medicine Group

**Strategic Directions International (SDi)** is the leading business intelligence firm in the highly specialized field of analytical and life science instruments. Its client list includes virtually every major analytical instrumentation company in the United States, Europe, and Japan. Founded in 1981, the Los Angeles-based company has published hundreds of market reports and provided proprietary consulting services for a multitude of clients. In September 2014, SDi was acquired by BioInformatics Inc, the leading research and advisory firm serving life science markets. As of 2018, both companies operate independently as members of the Science and Medicine Group. However, since the content of market research publications produced by SDi and BioInformatics is often complementary, collaboration on certain aspects of their development and/or marketing is not uncommon. The library of market knowledge and data that SDi has cultivated over the years has been researched by senior consultants and a team of expert scientific market researchers who actively update and cross-check information through both primary and secondary sources. In order to bring its clients a fresh, sophisticated view of the life science and analytical instrument industry, SDi produces two types of market research publications on a regular basis: Market Analyses and Perspective and Tactical Sales and Marketing.

For more information about SDi's product and service offerings, please visit [www.strategic-directions.com](http://www.strategic-directions.com), call **703.778.3080 x19**, or email [reports@strategic-directions.com](mailto:reports@strategic-directions.com)