

Client overview

A major specialty chemicals company asked SAL to review the market landscape of the chemicals used in upstream bioprocessing. They were interested in the chemicals used to produce biological drugs including recombinant proteins and antibodies.

Part of the landscape included exploring the manufacturing technologies employed in biomanufacturing. The company wanted to understand the suppliers and buyers of cell culture chemicals with a view to increasing their own offerings to the pharmaceutical industry. They asked SAL to provide quantitative market data to assist them with their decision making process.



The search

SAL identified the biomanufacturing technologies and chemicals used to produce biologic drugs by reviewing scientific and product literature and trade press articles. This was complemented with interviews with industry experts and professionals. cGMP chemical suppliers were identified from databases and industry news sites. Quantitative data on market size was calculated from values of manufacturing capacity (millions of litres of cell

culture media per year). SAL provided a final report describing the cell culture media products used in biomanufacturing and the major suppliers of these formulations. SAL also profiled the chemical ingredients used in cell culture media and found example suppliers of pharmaceutical-grade chemicals. Chemical list prices and data on chemical concentrations in media products were used to identify the highest value chemicals. The report also discussed future trends. After considering the findings, the client happily decided that upstream bioprocessing was not an area they wanted to pursue further.

Outcome

SAL provided information on 9 major manufacturers of cell culture media. The report described the biological function, concentration, and price of **17 classes of chemicals** used in cell culture products and included profiles of **36 pharma-grade chemical suppliers.**

The report also identified the **highest value chemicals used in upstream bioprocessing** with SAL's recommendations for next steps.

"...SAL's report helped us make a decision..."

"...really good data and story, and now we can draw a line under it..."