

Global Lipid Nanoparticle Raw Materials Market Size Study & Forecast, by Product (Ionizable lipids, Reagents, Other raw materials), By Disease Indication (Cancer, Infectious Diseases, Blood Diseases, Others), By Application (Therapeutics, Research), By End-use (Pharmaceutical & Biotechnology Companies, Academic & Research Institutes, Others), and Regional Analysis, 2023-2030

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Abstracts

Global Lipid Nanoparticle Raw Materials Market is valued at approximately USD 212.47 million in 2022 and is anticipated to grow with a healthy growth rate of more than 5.66% over the forecast period 2023-2030. Lipid nanoparticles (LNPs) are microscopic spherical structures composed of lipid molecules, designed to transport drugs, genes, or therapeutic agents into cells. Lipid nanoparticle raw materials are the components utilized in the creation and manufacturing of lipid nanoparticles (LNPs). Their significance in the medical field is growing rapidly as they offer a versatile platform for delivering a diverse range of molecules that might pose challenges in terms of cellular penetration. The growing demand for drugs utilizing lipid nanoparticles as delivery systems, increasing focus on nanotechnology, growing demand for drug delivery systems, along the rising prevalence of joint ventures and partnerships among market players are the most prominent factors that are propelling the market demand across the globe. Additionally, the rising prevalence of chronic diseases like cancer, cardiovascular disorders, and autoimmune conditions is anticipated to further bolster market growth. The rise in incidences of cancer influences the need for raw materials for Lipid Nanoparticles (LNPs) within the pharmaceutical and biotechnology sectors. According to the American Cancer Society for 2024 estimated 2,001,140 new cancer

cases and 611,720 cancer-related deaths in the U.S. The increase in cancer prevalence fuels the demand for effective cancer treatments. LNPs present a promising avenue for delivering anticancer drugs, offer their capacity to compress diverse drugs, improve drug solubility, and augment drug delivery to tumour sites. This surge in demand propels the need for raw materials essential in LNP synthesis.

Moreover, government funding is crucial for R&D projects aimed at developing novel lipid nanoparticle-based products, such as drug delivery systems for a variety of therapeutic uses. Furthermore, the market's expansion is propelled by leading players' increasing investment in research and development capabilities, which in turn fosters technical improvements, expands market prospects, and promotes innovation. For instance, in June 2022, Evonik announced plans to build a new, large-scale pharmaceutical lipid synthesis factory in the United States with a total investment of USD 220 million. The U.S. government has provided up to USD 150 million for this initiative with financing from the Biomedical Advanced Research and Development Authority (BARDA). Furthermore, the rise in pharmaceutical research and development, as well as the expanding applications in gene therapy and vaccines presents various lucrative opportunities over the forecasting years. However, the high development costs, along with the stringent regulations related to the approval and commercialization are hindering the market growth throughout the forecast period of 2023-2030.

The key regions considered for the Global Lipid Nanoparticle Raw Materials Market study include Asia Pacific, North America, Europe, Latin America, and Middle East & Africa. North America dominated the market in 2022 owing to the rapid growth of the pharmaceutical and biotechnology sectors. Additionally, growing investments in research and development by pharmaceutical companies and biotech enterprises in the United States and Canada are driving the demand for lipid nanoparticle-based drug delivery systems. The shift towards biologics and gene therapy products in North America has created new opportunities for lipid nanoparticle-based delivery systems. These nanoparticles are effective carriers for nucleic acids, including mRNA, siRNA, and gene-editing tools, to address diverse diseases. The approval of mRNA vaccines for COVID-19 has further underscored the promising potential of lipid nanoparticles in gene therapy applications. Moreover, Asia Pacific is expected to grow at the highest CAGR over the forecast years. The surge in economic activity, leading to growing healthcare expenditure and increased investments in medical research and development is significantly propelling the market demand across the region. Also, there is a rising demand for innovative drug delivery systems as healthcare infrastructure advances and access to medical services broadens, which is propelling the demand for lipid nanoparticles and, in turn, augments market expansion. Moreover, governments

across the Asia Pacific region are increasingly bolstering research and development initiatives in the life sciences sector through grants, subsidies, and incentives. For instance, Initiatives like China's 'Made in China 2025' plan and India's 'Biotechnology Industry Research Assistance Council' (BIRAC) are actively promoting innovation and entrepreneurship in biotechnology. This supportive environment fosters investments in lipid nanoparticle research and development, thereby contributing significantly to market growth.

Major market players included in this report are:

Merck KGaA

Echelon Biosciences

BroadPharm

Avanti Polar Lipids

Tebubio

CordenPharma International

Creative Biolabs

Biopharma PEG Scientific Inc.

NOF AMERICA CORPORATION

Polysciences, Inc.

Recent Developments in the Market:

In July 2023, Cytiva launched a formulation system tailored to streamline the seamless manufacturing of lipid nanoparticle medicines throughout both clinical and commercial phases. This system simplifies operations, fostering efficient and holistic production of lipid nanoparticle-based medications from initial development to full commercialization. Cytiva's formulation system for lipid nanoparticle medicines is poised to have a positive market impact by improving efficiency, accelerating development, expanding market reach, providing a

competitive advantage, and ensuring regulatory compliance, ultimately benefiting both companies and patients.

In July 2023, ModernaTX, Inc. and McGill University announced their strategic collaboration aimed at advancing research in lipid nanoparticle (LNP) technology. The collaboration encompasses two innovative projects concentrating on the exploration of specific facets of LNP properties, potentially including their characteristics or comparisons to naturally occurring particles. The collaboration between ModernaTX, Inc. and McGill University is driving innovation, attract funding, boost competitiveness, and leading for regulatory approvals in lipid nanoparticle technology, leading to significant market impact.

Global Lipid Nanoparticle Raw Materials Market Report Scope:

Historical Data – 2020 - 2021

Base Year for Estimation – 2022

Forecast period - 2023-2030

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Segments Covered - Product, Disease Indication, Application, End-use, Region

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent to up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define the market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within countries involved in the study.

The report also caters to detailed information about the crucial aspects such as driving factors & challenges that will define the future growth of the market. Additionally, it also incorporates potential opportunities in micro markets for stakeholders to invest along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segment of the market are explained below:

By Product:

Ionizable lipids

Reagents

Other raw materials

By Disease Indication:

Cancer

Infectious Diseases

Blood Diseases

Others

By Application:

Therapeutics

Research

By End-use:

Pharmaceutical & Biotechnology Companies

Academic & Research Institutes

Others

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

Saudi Arabia

South Africa

Rest of Middle East & Africa

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