

Antisense & RNAi Therapeutics Market Report by Technology (RNA Interference, Antisense RNA), Route of Administration (Intravenous Route, Subcutaneous Route, Intrathecal Route, Pulmonary Delivery, Intraperitoneal Injection, and Others), Application (Oncology, Cardiovascular Diseases (CVDs), Respiratory Disorders, Renal Diseases, Neurodegenerative Disorders, Genetic Disorders, Infectious Diseases, and Others), and Region 2024-2032

<https://marketpublishers.com/r/A63E27B03B69EN.html>

Date: August 2024

Pages: 147

Price: US\$ 3,899.00 (Single User License)

ID: A63E27B03B69EN

Abstracts

The global antisense & RNAi therapeutics market size reached US\$ 1.7 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 3.2 Billion by 2032, exhibiting a growth rate (CAGR) of 7.25% during 2024-2032. The market is experiencing steady growth driven by the increasing prevalence of genetic and chronic diseases globally necessitates innovative treatments, supportive regulatory environments across major markets to expedite the approval and commercialization of new therapies, and continuous technological advancements in drug delivery systems.

Antisense & RNAi Therapeutics Market Analysis:

Major Market Drivers: The market is driven by powerful technological drivers such as rapid advancements in drug delivery systems, which increased therapeutic impact on cells and targeting specificity, and a high incidence of genetic disorders and chronic diseases, which requires the use of cutting-edge

therapeutic modalities.

Key Market Trends: One of the major antisense & RNAi therapeutics industry trends is its tight association with the personalization of medicine based on unique genetic profiles and aimed at improving patient outcomes.

Geographical Trends: According to the antisense & RNAi therapeutics market analysis, North America dominates the market for Antisense & RNAi Therapeutics due to its excellent healthcare infrastructure, high healthcare spending, and friendly regulatory environment.

Competitive Landscape: This is a dynamic market with a pool of traditional drug market players such as top pharmaceutical companies and innovators that have established themselves. The competitive space will have to determine the battle for patents of owned technologies, achieving the green light from the regulatory authorities, and making new collaborations.

Challenges and Opportunities: The antisense & RNAi therapeutics market research report shows that the industry's major challenge is the high cost and complexity of developing and managing RNAi and antisense-based therapies. The latter is also an opportunity since it will transform the sector into loci of innovation and low-cost drug discovery resulting in breakthroughs in untreated genetic diseases.

Antisense & RNAi Therapeutics Market Trends:

Technological advancements in drug delivery systems

In this market, one of the major drivers is the continuing developments of drug delivery methods. These technologies allow RNA molecules to be delivered to relevant cells cleanly and efficiently, in a pattern that avoids degradation and hence provided enhanced efficacy in terms of therapy. For example, lipid nanoparticles and conjugate technologies enabled the previously negligible cellular uptake and balance of antisense oligonucleotides or siRNA. It increases delivery while enhancing the degree of similarity in which therapeutics are suitable to target specific human material, which is critical in cancer, disorders, and viral infections, among other things. The antisense & RNAi therapeutics market forecast indicates that these treatments will gain substantial research attention and financial investment. For instance, Novartis acquired DTx

Pharma in July 2023, which is a biotechnology company concentrating on short-interfering RNA therapy for neuroscience indications. Similarly, these acquisitions are creating a positive market outlook.

Increasing prevalence of genetic disorders and chronic diseases

The accelerating incidences of genetic and chronic diseases among the masses is significantly supporting the antisense & RNAi therapeutics market growth. Huntington's, certain types of cancer, and a wide range of hereditary genetic conditions are just a few examples of prevalent illnesses with few efficient treatments, which create demand for antisense & RNAi therapeutics. Along with this, Antisense and RNAi treatment options provide a new avenue as candidate disease-predisposing genes' repressors. On one hand, the new drugs have the best prospects of being included in clinical practice. On the other – by having the ability to target specific genes, they represent a new treatment modality for patients with conditions that are currently unmanageable using conventional pharmacological methods. This, in turn, generates a clear need for continued investment in new biopharmaceutical R&D projects.

Supportive regulatory environment for novel therapies

The antisense & RNAi therapeutics demand is impelled by the supportive regulatory environment. For instance, in October 2023, The Food and Drug Administration's Office of Orphan Products Development announced the availability of funds for fiscal year (FY) 2024 to help underwrite the costs of conducting natural history studies on rare diseases and conditions. The stated goal of this RFA is "to advance scientific rigor and collaboration for the benefit of patients with rare diseases or conditions." In addition, global health authorities, such as the FDA and EMA, are introducing faster review processes for any new therapies, inclusive of RNAi and antisense technology. Meanwhile, regulatory incentives like orphan drug status, accelerated approval, and priority review vouchers gain even more relevance since they give pharmaceutical companies even more incentive to put effort into the development of antisense and RNAi therapies.

Antisense & RNAi Therapeutics Market Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on technology, route of administration and application.

Breakup by Technology:

RNA Interference

siRNA

miRNA

Antisense RNA

Antisense RNA accounts for the majority of the antisense & RNAi therapeutics market share

The report has provided a detailed breakup and analysis of the market based on the technology. This includes RNA Interference (siRNA, and miRNA), and Antisense RNA. According to the antisense & RNAi therapeutics market report, Antisense RNA represented the largest segment.

Antisense RNA technology is the leader in the Antisense & RNAi Therapeutics market due to its mature methodology and the longest history of clinical application. Antisense RNA acts based on synthetic RNA molecules adhering to specific mRNA sequences, and it results in the blockade of target genes responsible for disease. In addition, the broadest possible range of applications from genetic pathologies to chronic diseases of various origins, including cancer, primarily has ensured its leader position. Apart from this, unlike other RNAi technologies, the leaders have already spent up to two years of widespread use, which allowed the investment of large resources in research and developing mechanisms of action and delivery. Moreover, some antisense therapeutic agents are already on the RNAi technology market with active FDA registration, which ultimately confirms their effectiveness and encourages further investment. All these factors contribute to ensuring a steady drill with the most significant share; even more, promising drugs already filed to proliferation can be observed in the antisense subfield. Thus, this technology leads the RNA based therapeutics market and lays the foundation for breakthroughs in this field.

Breakup by Route of Administration:

Intravenous Route

Subcutaneous Route

Intrathecal Route

Pulmonary Delivery

Intraperitoneal Injection

Others

Pulmonary delivery holds the largest share of the industry

A detailed breakup and analysis of the market based on the route of administration have also been provided in the antisense & RNAi therapeutics market report. This includes intravenous route, subcutaneous route, intrathecal route, pulmonary delivery, intraperitoneal injection, and others. According to the report, pulmonary delivery accounted for the largest antisense & RNAi therapeutics market share.

In the Antisense & RNAi therapeutics market, pulmonary delivery has taken the lead in terms of administration channels. There are several justifications, including direct utilization in curing respiratory conditions, in which localized delivery significantly increases the effectiveness. Thus, the ability to access the lungs and carry therapeutic agents is effective in treating diseases such as respiratory syncytial virus and pulmonary arterial hypertension as well as directing to lung cancer. It enabled high concentration of the solution on the site of the disease, limited systemic, hence lower side effects, improved patient adherence, and the overall effectiveness of treatment. Moreover, innovative inhalers and solutions that allow efficient drug delivery to lung tissues are also an important aspect. Due to the increasing load, there is pressure to make therapy as effective and targeted as possible. Therefore, pulmonary delivery serves as a key development focus of the RNAi technology market and directs the overall investment and innovation quotas.

Breakup by Application:

Oncology

Cardiovascular Diseases (CVDs)

Respiratory Disorders

Renal Diseases

Neurodegenerative Disorders

Genetic Disorders

Infectious Diseases

Others

The report has provided a detailed breakup and analysis of the market based on the application. This includes oncology, cardiovascular diseases (CVDs), respiratory disorders, renal diseases, neurodegenerative disorders, genetic disorders, infectious diseases, and others.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

North America leads the market, accounting for the largest antisense & RNAi therapeutics market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North

America represents the largest regional market for antisense & RNAi therapeutics.

North America is the largest regional segment in the Antisense & RNAi therapeutics market. This prominence is primarily due to the region's mature biotechnological and pharmaceutical research infrastructure. Additionally, unprecedented support from various national governments and other global health organizations has created a conducive environment for research and the advanced development required to progress antisense and RNAi therapy platforms. According to the antisense & RNAi therapeutics market analysis, the presence of several leading biotech and pharmaceutical companies in the region, which has created fierce competition and promoting innovation, has accelerated development opportunities as well as product launch. Additionally, North America's proactive regulatory environment, the exceptional participation of the FDA, which has fast-tracked many RNA-based drugs for several genetic and chronic disease conditions, supports the RNA based therapeutics market. Moreover, the high prevalence of target diseases, including cancer and genetic disorders, in the region creates antisense & RNAi therapeutics demand. Thus, North America leads the Antisense & RNAi Therapeutics market, as a dominant player in technology development and also as the primary market for RNA-based therapeutic products.

Competitive Landscape:

The market research report has also provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the major market players in the antisense & RNAi therapeutics industry include:

Anylam Pharmaceuticals Inc.

Arbutus Biopharma Corporation

Arrowhead Pharmaceuticals Inc.

Benitec Biopharma Ltd.

Bio-Path Holdings Inc.

Dicerna Pharmaceuticals Inc. (Novo Nordisk A/S)

Ionis Pharmaceuticals Inc.

OliX Pharmaceuticals Inc.

Phio Pharmaceuticals Corp.

Sarepta Therapeutics Inc.

Silence Therapeutics

Sirnaomics Inc.

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

The major players in the market are increasingly involved in research and development to diversify their genetic therapy portfolios. They are actively engaging in strategic partnerships, taking over small biotech companies, or collaborating with academic institutions and R&D centers to capitalize on emerging and disruptive technologies and fast-track drug development. In confluence with this, considering the high costs and development risks, companies make significant investments in clinical trials to guarantee their effectiveness and safety in a wider applications portfolio, especially in AINM diseases. Collaboration with the regulatory bodies enhances the companies' competitive performance and guides them along the way to bring new drugs faster. This initiative is vital for creating competitive advantages and a positive antisense & RNAi therapeutics market outlook.

Antisense & RNAi Therapeutics Market News:

April 08, 2024: OliX Pharmaceuticals Inc., a leading developer of RNA interfering therapeutics in the treatment area of severe diseases including fibro-inflammatory and metabolic diseases, disclosed that the Company has gotten approval from the Alfred Human Research Ethics Committee to commence the Phase 1 clinical trial of drug candidate OLX75016 (candidate of OLX702A for NASH treatment).

June 21, 2023: Arbutus Biopharma Corporation provided the first data from the empirical study on RNA interference therapy, nucleos(t)ide analogue (NA), and

pegylated interferon alfa-2a therapy in patients with chronic hepatitis B virus at the EASL Conference 2023.

Key Questions Answered in This Report

1. How big is the global antisense & RNAi therapeutics market?
2. What is the expected growth rate of the global antisense & RNAi therapeutics market during 2024-2032?
3. What are the key factors driving the global antisense & RNAi therapeutics market?
4. What has been the impact of COVID-19 on the global antisense & RNAi therapeutics market?
5. What is the breakup of the global antisense & RNAi therapeutics market based on the technology?
6. What is the breakup of the global antisense & RNAi therapeutics market based on the route of administration?
7. What are the key regions in the global antisense & RNAi therapeutics market?
8. Who are the key players/companies in the global antisense & RNAi therapeutics market?

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