

Exosome Diagnostics and Therapeutics Market by Type (Diagnostics, Therapeutics), Product & Service (Instruments, Kits, Reagents), Source (Stem Cells, Blood, Blood Plasma, Urine), Application (Cancer, Musculoskeletal, CVD) - Global Forecast to 2032

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Abstracts

The exosome diagnostics market is projected to grow from USD 59 million in 2024 to USD 2,347 million by 2029 at a CAGR of 108.9%. However, the candidates for exosome-based therapeutics are expected to be launched in the market from 2029 onwards. Thus, collectively exosome diagnostics and therapeutics market is expected to generate USD 59 million by 2024 and projected to reach USD 6,848 million in 2032 at a CAGR of 81.2%. Increasing number of clinical trials is expected to support the segment growth. Exosome-based therapies utilize vesicles released by cells to deliver therapeutic payloads. These vesicles offer advantages such as enhanced cargo bioavailability and the ability to cross biological barriers such as the blood-brain barrier. Despite these benefits, exosome therapies have not yet received regulatory approval. This is attributed to the challenges of standardizing exosome isolation and purification methods, scaling production, safety assurance, and regulatory processes. Companies such as Regeneus Ltd (Australia), CUREXSYS (Germany), and Direct Biologics LLC (US) are the key players in this segment that are focused on developing exosome-based therapeutics for clinical indications.

“Instruments & services segment is expected to grow at the fastest pace during the forecast period.”

Exosome characterization is done precisely through flow cytometry, nanoparticle tracking analysis, and ultracentrifugation in exosome diagnoses and treatments. The rising demand for exosome characterization & enrichment services is expected to

support market growth. Some market players operating in the exosome diagnostics and therapeutics market also use their patented/proprietary technologies to offer end-to-end exosome services, including engineering, characterization, and purification. These players provide support services from a commercial viewpoint, targeted toward scalable exosome manufacturing and analysis from potential diagnostic samples such as blood, urine, and saliva.

“The urine source segment accounted for the largest share in the exosome diagnostics and therapeutics market in 2023.”

Rapid commercialization of urine sample-based diagnostic tests is set to drive market. Urinary exosomes, released by cells in the urine system, represent an emerging route for diagnosing and monitoring renal disorders. Their distinct characteristics, such as the capacity to shield their molecular cargo from degradation and contamination, make them primary candidates for renal dysfunction and structural injury biomarkers. The non-invasive method of urine collection and the stability and sufficiency of urinary exosomes highlight its potential for early disease detection and diagnosis.

“Cancer is expected to emerge as the dominant application segment in the exosome therapeutics market.”

Growing focus on oncology therapeutics is expected to propel the market growth. Exosomes also play a critical role in cancer therapy as carriers of therapeutic cargo, delivering drugs, RNA interference molecules, or immunomodulatory agents to target cancer cells. The University of Texas MD Anderson Cancer Center in Texas (US) is conducting clinical trials (NCT03608631) to study the optimal dosage effects and effects of mesenchymal stromal cells-derived exosomes with KrasG12D siRNA (iExosomes) in treating participants with pancreatic cancer with KrasG12D mutation. Despite these developments, challenges such as optimizing the exosome isolation technology and ensuring efficient delivery of therapeutic cargo to tumors are expected to hinder market growth during the forecast period.

North America dominates the global exosome diagnostics and therapeutics market throughout the forecast period.

The exosome diagnostics and therapeutics market is segmented into four regions: North America, Europe, the Asia Pacific (APAC), and the Rest of the World. As of April 2024, only one exosome-based diagnostic product has been approved and is available in the US. The US has thus emerged as a key revenue source for the global exosome

diagnostics and therapeutics market, in turn making North America the dominant region in the market.

Breakdown of supply-side primary interviews by company type, designation, and region:

By Respondent: Supply Side (70%), Demand side (30%)

By Designation: C-level (55%), Director-level (20%), and Others (25%)

By Region: North America (50%), Europe (20%), AsiaPacific (20%), and Rest of the World(10%)

List of Companies Profiled in the Report

Bio-Techne (US)

NanoFCM Inc. (UK)

System Biosciences, LLC. (US)

Capital Biosciences, Inc. (US)

AMSBIO (UK)

INOVIQ (Australia)

Direct Biologics LLC (US)

Regeneus Ltd (Australia)

CUREXSYS (Germany)

Aegle Therapeutics (US)

Mercy Bioanalytics (US)

multimmune GmbH (Germany)

RION (US)

Exogenus Therapeutics (Portugal)

Everzom (France)

Kimera Labs (US)

NanoSomiX, Inc. (US)

Exonox Biosciences, Inc. (Taiwan)

Capricor Therapeutics, Inc. (US)

Evov Therapeutics (US)

ILIAS Biologics Inc. (Korea)

Research Coverage

This report studies the exosome diagnostics and therapeutics market based on type, product & service, source, application, end user, and region. The report also analyzes factors (such as drivers, restraints, opportunities, and challenges) affecting the market growth. It evaluates the opportunities and challenges in the market for stakeholders and provides details of the competitive landscape for market leaders. The report also studies micro markets with respect to their growth trends, prospects, and contributions to the total exosome diagnostics and therapeutics market. The report forecasts the revenue of the market segments with respect to four major regions.

Reasons to Buy the Report:

The report provides insights on the following pointers:

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Market Drivers: The key factors driving the overall market growth emerging potential of exosome-based liquid biopsy, increasing collaborations & commercialization initiatives, and growing outsourcing of exosome

manufacturing activities.

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the exosome diagnostics and therapeutics market.

Market Penetration: Comprehensive information on exosome diagnostics and therapeutics offered by the top 21 players in the market. The report analyzes the exosome diagnostics and therapeutics market by type, product & service, application, source, end user, and region.

Market Development: Comprehensive information about lucrative emerging markets. The report analyzes the markets for various products/types of exosome diagnostics and therapeutics across key geographic regions.

Market Diversification: Exhaustive information about untapped geographies, recent developments, and investments in the exosome diagnostics and therapeutics market

Competitive Assessment: In-depth assessment of market shares and strategies of the leading players in the exosome diagnostics and therapeutics market

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