

# Global Protein A Resin - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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## Abstracts

The Global Protein A Resin Market size is estimated at USD 1.17 billion in 2024, and is expected to reach USD 1.78 billion by 2029, growing at a CAGR of 8.69% during the forecast period (2024-2029).

According to Cancer Facts and Figures 2023 by the American Cancer Society, the number of new cancer cases in the United States was estimated to be 1.95 million in 2023, of which 1.01 million were male and 0.94 million were female. Similarly, according to the February 2022 update by the World Health Organization, cancer prevalence was high, and it was evident in the most common types of cancer in terms of new cases. The rising burden of cancer is augmenting the demand for antibodies to manage disease complications, which is expected to drive the market's growth over the forecast period.

The number of drug discoveries and research and development activities is increasing. Monoclonal antibodies are at the forefront of modern drug development, particularly in oncology, autoimmune diseases, and infectious diseases. Its targeted nature and high efficacy have led to a surge in the development of new mAb-based therapies. This necessitates a robust and scalable purification process, making protein A resin critical for biopharmaceutical companies. For instance, according to a report published by the Society of Biological Engineering Journal in February 2023, the increased demand for efficient purification methods in the biopharmaceutical industry, where increasing drug discoveries and R&D activities fuel the need for protein A chromatography, boosted the growth of the protein A resin market. The ability to reuse protein A resins across multiple products in GMP facilities can reduce costs and improve efficiency, further propelling market growth.

According to a report published by the Monoclonal Antibody Journal in January 2024, the growing focus on monoclonal antibody therapeutics, evidenced by an increase in drug discoveries and R&D activities, is driving the demand for protein A resin, a key component in antibody purification. As more antibodies are developed for clinical use and regulatory approval, such as lecanemab (Leqembi) for Alzheimer's disease and talquetamab (Talvey) for cancer, the need for effective purification processes using protein A resin is becoming more critical.

While several factors contribute to the growth of the market, the high costs associated with protein A resin are expected to impede the growth of the market over the forecast period.

### Protein A Resins Market Trends

#### Pharmaceutical and Biopharmaceutical Companies are Expected to Dominate the End User Segment

Pharmaceutical and biopharmaceutical companies mainly use proteins as the principal target, and thus, protein analysis has a very important role in drug discovery and development in the pharma and biotech industries. The common application of protein analysis involves target identification, evaluation, identification of efficacy and toxicity biomarkers from readily accessible biological fluids, and investigations into mechanisms of drug action or toxicity. This, in turn, is expected to grow significantly due to a large number of ongoing drug development projects in pharmaceutical and biopharmaceutical projects across the world.

A rise in government funding for pharmaceutical research and development and technological advancements in the area of analytical instruments are expected to drive the growth of the segment. Also, increasing life science R&D expenditure, progressing drug discovery, and an increase in the adoption of chromatography are key factors driving the growth of the protein A resin market in the pharmaceutical and biopharmaceutical industries. For instance, in April 2024, Merck planned to invest around USD 324.67 million (EUR 300 million) for the development of a new, advanced research center in Darmstadt, Germany, dedicated to providing research solutions for manufacturing antibodies, mRNA applications, and additional products required for biotechnological production, among other things. In November 2022, Otsuka Pharmaceutical Co. Ltd (Otsuka) inaugurated the Osaka Research Center for drug discovery. It is a research facility focused on drug discovery in Minoh City, Osaka

Prefecture, Japan. Thus, increasing investments in the development of research and manufacturing facilities focused on antibodies will generate the need for protein A resins, driving the growth of the market.

Increasing agreements for products and expansions to address the demand from the pharmaceutical and biopharmaceutical industries are also expected to contribute to the market's growth. For instance, in November 2023, Purolite, an Ecolab company, and Repiligen Corporation extended their agreement until 2032 to supply five high-performance ligands for bioprocessing. Furthermore, in January 2023, Ecolab Inc. started the expansion of the Purolite business with the addition of a new biologics resin manufacturing facility in Landenberg, Pennsylvania. With this, the company aims to strengthen the supply for global pharmaceutical and biotech customers by developing and producing lifesaving clinical and commercial-scale therapeutics for patients worldwide. Such initiatives demonstrate that pharmaceutical and biopharmaceutical companies generate a high demand for protein A resin, which is expected to boost the growth of the segment during the forecast period.

### North America is Expected to Hold a Significant Share in the Market Over the Forecast Period

The market for protein A resin in North America is expected to experience lucrative growth owing to factors such as the rising burden of infectious and chronic diseases, technological advancements in the market, and increasing research and development expenditure on pharmaceutical and biological research. In addition, product launches and strategic initiatives by key market players contribute to market growth.

The biopharmaceutical industry in the United States is expanding rapidly, with an increasing focus on developing biologics such as monoclonal antibodies (mAbs) for therapeutic purposes. Protein A resins play a crucial role in the purification of these antibodies, driving the demand for such resins. For instance, according to ClinicalTrial.gov, as of March 2024, there were 1,248 clinical studies reported for monoclonal antibodies in the United States. Thus, a high number of clinical trials indicates a robust biopharmaceutical development pipeline, including monoclonal antibodies. Thus, the demand for protein A resins increases proportionally to support the purification and production processes at scale, boosting market growth.

The demand for antibodies that are used in chronic disease treatment is growing, and

funding for it is expected to increase, leading to a rise in demand for protein A resins that are crucial for purifying and producing these antibodies at a large scale. In July 2023, the governments of Canada and British Columbia funded the construction of antibody-based facilities to bolster capabilities and infrastructure. The CAD 701 million (USD 515 million) investment aims to strengthen Canada's capabilities and infrastructure for drug development, production, and clinical research. Additionally, in July 2023, Vancouver-based antibody manufacturer AbCellera was expected to invest CAD 401 million (USD 294 million) in antibody projects, and the governments of Canada and British Columbia contributed CAD 300 million (USD 221 million) collectively.

### Protein A Resins Industry Overview

The protein A resin market is moderately competitive, with few players dominating it. Companies are taking the initiative to grow their presence in the market. Key players expected to dominate the market are Danaher Corporation, Thermofisher Scientific Inc., GE Healthcare, Merck KGaA, Agarose Beads Technologies, Bio-Rad Laboratories Inc., Expedeon Ltd, Genscript Corporation, Novasep, Purolite Lifescience, and Repligen.

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