

Glycan Analysis Market by Company Size, Analytical Techniques and Key Geographical Regions: Industry Trends and Global Forecasts, 2021-2030

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Abstracts

The glycan analysis market is expected to reach USD 456 million in 2021 and anticipated to grow at a CAGR of 20.8% during the forecast period 2021-2030.

Recombinant glycoprotein therapeutics, which include antibody-based interventions, have emerged as a swiftly expanding class of pharmacologically active compounds. Currently, over 67% of biologics and 80% of FDA-approved biosimilars incorporate some form of glycosylation. Notably, the pipeline for these interventions is experiencing substantial growth at a Compound Annual Growth Rate (CAGR) exceeding 20%. It's crucial to underscore that in higher eukaryotes like humans, DNA glycosylation of specific biomolecules holds not only functional significance but also provides beneficial pharmacological properties, impacting efficacy, solubility, stability, and antigen binding. Additionally, glycans serve as promising biomarkers aiding in disease prognosis, diagnosis, and predicting treatment efficacy. Various abnormal glycan molecules associated with tumors (e.g., Tn, sialyl-T, sialyl-Tn) and virulent glycoproteins on pathogenic viral surfaces (like the glycan shield linked to the SARS-CoV-2 spike glycoprotein) are presently being investigated as potential therapeutic targets.

However, the complex nature of glycan analysis poses challenges for non-specialist researchers and therapy developers in effectively studying these biomolecules. Analytical procedures are further complicated by multi-step protocols and demanding expertise, often resulting in sample contamination and inconsistent test results. Recent advancements in approaches, such as utilizing complementary techniques and the middle-up strategy for analyzing data from diverse bioanalytical techniques in glycan profiling and analysis, necessitate considerable domain expertise. Consequently, drug developers and medical researchers increasingly rely on contract service providers

equipped with the necessary analytical expertise and technical infrastructure for glycan analysis. Presently, more than 130 industry and non-industry entities claim to actively provide glycan analysis services. Notably, numerous stakeholders in the service sector have formed strategic alliances or acquired other players offering glycan analysis services for monoclonal antibodies or related services, intending to expand their respective portfolios. Considering the growing trend of outsourcing and the ongoing efforts of service providers to enhance and broaden their offerings, steady growth is expected in the contract services market for glycan analysis during the forecast period.

Report Coverage

The report examines the glycan analysis market, focusing on factors such as company size, analytical techniques, and geographical considerations.

Analysis encompasses market growth influencers like drivers, restraints, opportunities, and challenges.

Assessments outline the market's advantages, obstacles, and competitive landscape for leading players.

Revenue forecasts for market segments across various countries are provided.

Evaluation of industry players in glycan analysis services includes criteria such as establishment year, company size, headquarters location, and offered services, covering glycan profiling, structure analysis, glycosylation site mapping, among others. It also reviews additional services such as peptide mapping, glycan synthesis, and availability of synthetic glycans and analytical kits. Non-industry players' glycoanalytical services and techniques are examined.

Region-specific evaluations highlight notable glycan analysis service providers based on supplier strength (experience, company size) and portfolio specifics (services offered, analytical techniques, glycans analyzed, analytes processed, and applications).

Detailed profiles of key glycan analysis service providers include company overview, service portfolio, recent developments, and future outlook.

Assessment of surface glycan targeting therapeutics includes their status in

commercial, clinical, preclinical, and discovery phases, covering lead candidates, target diseases, drug molecules, therapy types, technology platforms, and developer details.

Analysis of grants awarded to research institutes for surface glycan targeting therapeutic projects between 2016 and 2021, considering grant details, administering institutes, recipient organizations, geographical distribution, funding centers, program officers, and focus areas.

Examination of partnerships involving acquisitions, mergers, licensing agreements, product and research developments in the glycan analysis market since 2015.

Analysis of mergers and acquisitions between 2015 and 2021, considering deal types, company size, headquarters' locations, and key value drivers, including an ownership change matrix highlighting private and public sector involvement.

A case study on Fc glycoengineered antibody developers, covering establishment year, company size, headquarters location, development phase, disease indication, therapeutic area, molecule type, biological target, therapy type, route of administration, Fc engineering impact, and technology platform. These structured points constitute a comprehensive analysis framework for the glycan analysis market and surface glycan targeting therapeutics.

Key Market Companies

CD BioGlyco

Creative Biolabs

Creative Proteomics

Thermo Fisher Scientific

Glykos Finland

glyXera

Ludger

Protagen Protein Services

Mithra Biotechnology

Protein Works

Savyon Diagnostics

Syngene

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