

Europe Transfection Reagents and Equipment Market Forecast to 2030 - Regional Analysis - by Product (Reagents and Instruments), Method (Viral Methods, Non Viral Methods, and Hybrid Methods), Application (Biomedical Research, Protein Production, and Therapeutic Delivery), and End User (Academics & Research Institutes and Pharmaceutical & Biotechnology Companies)

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Abstracts

The Europe transfection reagents and equipment market was valued at US\$ 306.04 million in 2022 and is expected to reach US\$ 555.46 million by 2030; it is estimated to register at a CAGR of 7.7% from 2022 to 2030.

Strategic Initiatives by Companies Drive Europe Transfection Reagents and Equipment Market

Transfection is the complex step in the overall process of developing a viral vector, which includes adenovirus, adeno-associated virus, and lentivirus. As the manufacturing processes are scaled up, transient transfection must also be ramped up. Process equipment vendors, drug developers, and raw material suppliers are focusing on collaborations to develop cost-effective, practical, and platformizable solutions for the rapid development and scaling up of viral vector manufacturing processes. On small scales, with planned material volumes and transfer & mixing times, transfecting cells with multiple plasmids becomes feasible. Scaling up requires experience in industrializing the transfection step since most companies only have transfection experience at the lab level. However, the volume of cell-culture media and transfection

reagents required for scaling up the process to a larger level can be impractical, which emphasizes the need for optimization. Nonetheless, broadening the scale of production has become common in recent years with the surging demand for viral vectors. With numerous challenges associated with large-scale transfection processes, the best approach to increase production is by reducing the process rather than scaling up the process. This top-down approach allows clear identification of the conditions that will impact the process at the industrial level such as the volume of transfection complex solution. This approach also facilitates process optimization and decision-making. The development of such approaches to ramp up the small-scale transfection processes acts as an opportunity for the growth of the Europe transfection reagents and equipment market.

Europe Transfection Reagents and Equipment Market Overview

Europe region segmented into UK, Germany, France, Spain, Italy, and Rest of Europe. United Kingdom holds the largest market share in the year 2022. The growth of the pharmaceutical industry is determined by the high-quality research and development ongoing in the country, and extensive and flourishing healthcare knowledge base. The UK is one of the world's best ecosystems for research, development, manufacturing, clinical adoption, and reimbursement of advanced therapeutics. Currently, over 85 clinical trials are ongoing in the UK, and 70 CGT companies are striving to develop potentially curative therapies. Catapult is a top company that has been contributing significantly to the CGT ecosystem in the UK; it stands as one of the top five companies involved in developing manufacturing processes of reagents and devices in the country. The company is focused on developing smarter automated CGT manufacturing processes that can automatically adapt to changing environments and process requirements with minimal intervention. Therefore, efforts made by UK-based companies to enhance productivity and reduce final product costs are the major factors driving the growth of the cell and gene therapy market in the UK. Moreover, the UK holds a strong position in the cell and gene therapy market in Europe owing to sustained and targeted investment in research, which further benefits the market.

Moreover, France has the presence of biopharmaceutical and pharmaceutical giants such as Sanofi S.A., Ipsen, Pierre Fabre, HRA Pharma, and TxCell (Sangamo Therapeutics, Inc.). These companies are involved in the development of vaccines and antibodies, among others, which require freeze-drying for their products, which contributes to the demand for transfection reagents and equipment.

Europe Transfection Reagents and Equipment Market Revenue and Forecast to 2030

(US\$ Million)

Europe Transfection Reagents and Equipment Market Segmentation

The Europe transfection reagents and equipment market is segmented based on product, method, application, end user, and country.

Based on product, the Europe transfection reagents and equipment market is bifurcated into reagents and instruments. The reagents segment held a larger share in 2022.

In terms of method, the Europe transfection reagents and equipment market is segmented into viral methods, non-viral methods, and hybrid methods. The non-viral methods segment held the largest share in 2022. The viral segment is subcategorized into retrovirus, adenovirus, adeno associated virus, and herpes virus. The non-viral segment is bifurcated into physical/mechanical method and chemical method. Further, the physical/mechanical method segment is subcategorized into electroporation, microinjection, biolistic method, laser method, magnetofection, and sonoporation. Also, the chemical method segment is subcategorized into liposomal based/high lipid and non-liposomal/high lipid based.

By application, the Europe transfection reagents and equipment market is segmented into biomedical research, protein production, and therapeutic delivery. The biomedical research segment held the largest share in 2022.

Based on end user, the Europe transfection reagents and equipment market is bifurcated into academics & research institutes and pharmaceutical & biotechnology companies. The academics & research institutes segment held a larger share in 2022.

Based on country, the Europe transfection reagents and equipment market is categorized into Germany, France, the UK, Italy, Spain, and the Rest of Europe. The UK dominated the Europe transfection reagents and equipment market in 2022.

Fisher Scientific Inc, Promega Corp, F. Hoffmann-La Roche Ltd, Bio-Rad Laboratories Inc, Mirus Bio LLC, QIAGEN NV, Merck KGaA, Lonza Group AG, MaxCyte Inc, and Polyplus-Transfection SA are some of the leading companies operating in the Europe transfection reagents and equipment market.

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