

North America Microcarriers Market Forecast to 2030 - Regional Analysis - by Product (Media & Reagents and Microcarrier Beads), Equipment (Bioreactors, Culture Vessels, and Others), Application (Biopharmaceutical Production, Cell and Gene Therapy, Tissue Engineering and Regenerative Medicine, and Others), and End User (Pharmaceutical and Biotechnology Companies, Contract Research Organizations & Contract Manufacturing Organizations, and Academic & Research Institutes)

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Abstracts

The North America microcarriers market is expected to grow from US\$ 736.67 million in 2022 to US\$ 1,933.56 million by 2030. It is estimated to record a CAGR of 12.8% from 2022 to 2030.

Automation of Cell and Gene Therapy Manufacturing Services Fuels North America Microcarriers Market

Incorporating automation in cell and gene therapy manufacturing would lead to a reduced risk of contamination, improved consistency, and decreased cost of production. Lonza Cocoon and the CliniMACS Prodigy system from Miltenyi are a few of the devices available in the market that have been designed to enable the automation of most sequential unit operations for a CAR-T process within a single system. The rising demand for cell and gene therapies has shifted production from a small-volume process to a large-volume process worldwide. The progress of cell and gene therapy from an

academic and clinical setting to mass production and commercialization further propels the demand for automation in commercial manufacturing. In July 2020, Thermo Fisher Scientific Inc. and Lyell Immunopharma partnered to develop processes to design effective cell therapies for cancer patients. Under this partnership, the companies aim to improve the capability of T-cells and support the development of an integrated current good manufacturing practice (cGMP) compliant platform (system and software), along with reagents, consumables, and instruments. Further, the US government-aided organizations are adopting automation in the manufacturing of cell therapies to increase the national production capabilities of the country. Thus, automation is emerging as a new trend in the microcarriers market.

North America Microcarriers Market Overview

The North America microcarriers market is segmented into the US, Canada, and Mexico. The US dominates the market in this region. The growth of the microcarriers market in North America is attributed to the increasing number of product launches by biotechnology and biopharmaceutical companies, the presence of key market players, and extensive R&D by various academic and research institutes. The rising prevalence of chronic diseases is a leading factor propelling the growth of the microcarrier market in the US. According to the Centers for Disease Control and Prevention (CDC), 6 in 10 Americans live with at least 1 chronic disease, such as heart disease and stroke, cancer, or diabetes. These diseases are the significant causes of mortality and disability in the US, and they also lead to significant costs of healthcare. There have been extensive clinical developments in the field of cell and gene therapies (CGT), owing to which the application range of these therapies has expanded in the past 5 years. With the approval of 12 new therapies and the commencement of over 2,900 clinical trials during the analysis period of 2016-2021, there have been extensive investments in CGT innovations. Technological advancements in gene editing, followed by clinical trials to evaluate the therapeutic effectiveness of the technique, are the other factors that have benefitted the microcarriers market in the US. For example, Poseida Therapeutics, Inc. received the US Food and Drug Administration (FDA) approval for its Investigational New Drug (IND) application for P-CD19CD20-ALLO1-the company's first allogeneic dual CAR-T cell product candidate targeting both CD19 and CD20 antigens for the treatment of relapsed or refractory B-cell malignancies-being developed in partnership with Roche. In April 2023, Novel allogeneic CAR T-cell therapy delivered results in patients with metastatic clear cell renal cell carcinoma. Thus, increased participation and investments in clinical trials can accelerate the adoption and availability of new therapies. Researchers at the University of Texas MD Anderson Cancer Center led the Phase I trial and presented at the American Association for Cancer Research (AACR)

Annual Meeting 2023. In August 2023, Astellas Pharma Inc. and Poseida Therapeutics, Inc. announced a strategic investment to support the advancement of Poseida's commitment to redefining cancer cell therapy. Astellas invested US\$ 50 million to license one of Poseida's clinical-stage programs focusing on P-MUC1C-ALLO1, an allogeneic CAR T-cell therapy for multiple solid tumor indications. Thus, the demand for microcarriers is on the rise in the US with the increasing number of chronic disease cases and approval of different cell and gene therapies.

North America Microcarriers Market Revenue and Forecast to 2030 (US\$ Million)

North America Microcarriers Market Segmentation

The North America microcarriers market is segmented into product, equipment, application, end user, and country.

Based on product, the North America microcarriers market is bifurcated into microcarriers beads and media & reagents. The microcarriers beads segment held a larger share of the North America microcarriers market in 2022.

In terms of equipment, the North America microcarriers market is segmented into bioreactors, culture vessels, and others. The bioreactors segment held the largest share of the North America microcarriers market in 2022.

Based on application, the North America microcarriers market is segmented into biopharmaceutical production, cell and gene therapy, tissue engineering and regenerative medicine, and other. The biopharmaceutical production segment held the largest share of the North America microcarriers market in 2022. Further, biopharmaceutical production segment is categorized into therapeutic protein production and vaccine production.

Based on end user, the North America microcarriers market is segmented into pharmaceutical & biotechnology companies, contract research organizations & contract manufacturing organizations, and academic & research institutes. The pharmaceutical & biotechnology companies segment held the largest share of the North America microcarriers market in 2022.

Based on country, the North America microcarriers market is segmented into the US, Canada, and Mexico. The US dominated the North America microcarriers market in 2022.

Teijin Ltd, Bio-Rad Laboratories Inc, Sartorius AG, Danaher Corp, Corning Inc, Eppendorf SE, Asahi Kasei Corp, and Polysciences Inc are some of the leading companies operating in the North America microcarriers market.

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