

North America 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 North America transfection reagents and equipment market was valued at US\$ 540.57 million in 2022 and is expected to reach US\$ 995.53 million by 2030; it is estimated to register at a CAGR of 7.9% from 2022 to 2030.

Strategic Initiatives by Companies Fuel North America Transfection Reagents and Equipment Market

Companies operating in the North America transfection reagents and equipment market focus on strategic developments such as collaborations, expansions, agreements, partnerships, and new product launches, which help them improve their sales, expand their geographic scope, and enhance their capacities to cater to a larger than existing customer base. These developments also contribute to the introduction of new trends to the market to a certain extent. A few of the noteworthy developments in the North America transfection reagents and equipment market are mentioned below.

In April 2023, Thermo Fisher Scientific launched the Invitrogen Neon NxT Electroporation System that facilitates transfection, even with the most challenging cell

types, enabling high efficiency, cell recovery, and reproducibility. Neon NxT electrodes are optimally placed to provide minimal surface area and create a more uniform electric field, and maintain apt physiological conditions during transfection, thereby enabling the desired modification to take place in more cells and reducing the number of cells lost during the process. The new system also features an improved feedback loop and ergonomic enhancements for ease of use. In August 2021, Mirus Bio launched the TransIT VirusGEN GMP Product Line, which provides transfection reagents and enhancers to support the manufacturing of viral vectors for the development of gene therapies. The TransIT VirusGEN GMP transfection reagent was developed to enhance the delivery of transfer vaccine DNA to suspension and adherent HEK 293 cells to make the production of recombinant AAV and LV vectors more efficient. In July 2020, Polyplus-transfection SA launched the first GMP-compliant residual test for its PEIpro product portfolio of transfection reagents designed to support the development of the preclinical, clinical, and commercial process of lentivirus and adeno-associated virus (AAV) production for cell and gene therapies. In addition, Polyplus-transfection also launched dual sourcing for its PEIpro-GMP product for late-stage and commercialization cell and gene therapies. Thus, the introduction of products such as transfection reagents and systems; the development of innovative products targeting various health issues to create new or improved products; and the initiation of new businesses to remain competitive in the market, all, through collaborations and partnerships can help speed up the development of new platforms for transfection reagents and equipment.

North America Transfection Reagents and Equipment Market Overview

Cell and gene therapies (CGTs) are prescribed to treat patients suffering from serious and rare diseases with unaddressed therapeutic needs. Manufacturing CGTs is a highly complex process, with the insufficiency of infrastructure and expertise being a major limiting factor. Logistics-related challenges associated with intermediates and the final product also limit the CGT manufacturing capacity of companies. The CGT manufacturing process involves the extraction of autologous cells through "apheresis," dispatching them to specialized laboratories and sending them back to clinics for administration into patients, all of which must be performed with strict quality control. The US Food and Drug Administration (FDA) has approved only 7 CGT drugs so far, and the pipeline of new products has reached ~1,200 experimental therapies. Half of these are in Phase 2 clinical trials. With these prospects, annual sales of cell therapies and gene therapies are estimated to grow by 15% and ~30%, respectively, as stated in the Chemical & Engineering News Report 2023.

Many manufacturers approach contract development manufacturing organizations (CDMOs) such as Labcorp, Lonza, and Catalent to overcome the barriers associated with the production and commercialization of their CGT products. Lonza has invested ~US\$ 9.2 million to strengthen its cell and gene therapy manufacturing capabilities. Such initiatives by CDMOs are contributing to the growth of the transfection reagents and equipment market in the US.

Furthermore, in February 2022, François-Philippe Champagne, the minister of Innovation, Science and Industry, announced the funding of US\$ 45 million to the Government of Canada through the Canada Foundation for Innovation (CFI) to ensure that research teams have appropriate labs and infrastructure, and access to technology departments for carrying out world-class research. The Canadian Institutes of Health Research (CIHR) announced a partnership with the Quebec Consortium for Drug Discovery (CQDM) for a new collaborative funding program on personalized medicine to accelerate drug discovery and drug development.

North America Transfection Reagents and Equipment Market Revenue and Forecast to 2030 (US\$ Million)

North America Transfection Reagents and Equipment Market Segmentation

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

Based on product, the North America 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 North America 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 sub categorized 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 sub categorized into electroporation, microinjection, biolistic method, laser method, magnetofection, and sonoporation. Also, the chemical method segment is sub categorized into liposomal based/high lipid and non-liposomal/high lipid based.

By application, the North America 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 North America 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 North America transfection reagents and equipment market is categorized into the US, Canada, and Mexico. The US dominated the North America transfection reagents and equipment market in 2022.

Thermo 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 North America transfection reagents and equipment market.

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