

Transfection Reagents and Equipment Market Size and Forecast (2020 - 2030), Global and Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Product (Reagents and Instruments), Method (Viral Methods, Non Viral Methods, and Hybrid Methods), Application (Biomedical Research, Protein Production, and Therapeutic Delivery), End User (Academics & Research Institutes and Pharmaceutical & Biotechnology Companies), and Geography

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Abstracts

The transfection reagents and equipment market is expected to grow from US\$ 1.170 billion in 2022 to US\$ 2.145 billion by 2030; it is anticipated to record a CAGR of 7.8% from 2022 to 2030.

Growing Economic Burden of Cancer is Driving the Transfection Reagents and Equipment Market Growth

According to the World Health Organization (WHO), cancer is one of the leading causes of death worldwide, and it accounted for ~10 million deaths in 2020. As per the International Agency for Research on Cancer, the global cancer burden is likely to increase with the addition of 30.2 million more cases by 2040. According to the Breast Cancer Organization, approximately 5–10% of breast cancer cases worldwide are hereditary and are caused by abnormal genes passed from generations. According to the article "Lifestyle, Genetic Risk and Incidence of Cancer," published in the

International Journal of Epidemiology in 2023, nearly 33% of cancer conditions that occur are hereditary, and the risk of genetic mutations is high in the disease. Hence, people opt for genetic profiling for the early detection and personalized treatment of hereditary cancer cases. BRCA1 and BRCA2 are sometimes referred to as tumor suppressor genes. People who inherit the harmful variants of one of these genes are at a greater risk of several cancers, most notably breast and ovarian cancer, among other types. These people also tend to develop cancer at younger ages compared to people who do not have variations in the said genes. Studies focused on nucleic acid processing by cancer cells will likely help understand cancer metabolism. DNA is typically packaged into a viral or non-viral particle to be transferred into the cell to be transfected. Gene transfer has been proposed as a new approach to enhance the effectiveness of antitumor drugs in treating intractable or metastatic cancers. The association of gene therapy and drugs (similar therapy) has been reported to strengthen the antiproliferative effects of classical treatments in lung, colorectal, pancreatic, bladder, and breast cancers, among others. Thus, the elevating economic burden of cancer bolsters the transfection reagents and equipment market.

Cell and gene therapy manufacturing is a complicated process, which makes its execution and monitoring critical. Advancements in biotechnology have led to the adoption of personalized treatments for the treatment of numerous indications. Cell and gene therapies are mostly used to treat chronic diseases such as neurological disorders, cancer, and genetic disorders. The noteworthy advantages of cell and gene therapy include targeted treatment, faster and more efficient recovery, and reduced side effects. Cell and gene therapies are widely adopted worldwide owing to the availability of Food and Drug Administration (FDA) approved products. For instance, the FDA approved an adenovirus, ADSTILADRIN manufactured by Ferring Pharmaceuticals A/S in 2022. This recombinant adenovirus (rAd-IFNa/Syn3) delivers human interferon alfa-2b cDNA into the bladder epithelium to treat patients suffering from certain types of bladder cancer. In 2022, CARVYKTI, manufactured by Janssen Biotech, Inc., was also approved by the FDA. CARVYKTI is an autologous CAR-T cell engineered with lentivirus to attack BCMA-expressing tumor cells to treat certain kinds of relapsed or refractory multiple myeloma.

According to the article "Gene therapy process change evaluation framework: Transient transfection and stable producer cell line comparison," published by the University College London (UCL) in 2020, 423 ongoing clinical trials were being conducted to test gene therapy products. Scientists nowadays employ the transfection technique for the production of these therapies. Hence, an upsurge in the popularity of cell and gene therapy activities fuels the number of transfection procedures performed, which, in turn,

fuels the growth of the transfection reagents and equipment market.

The transfection reagents and equipment market is divided based on product, modality, application, end user, and geography. Based on product, the market is classified into reagents and equipment. Based on modality, the transfection reagents and equipment market is classified into viral, non-viral, and hybrid methods. In terms of application, the transfection reagents and equipment market is classified into biomedical research, protein production, and therapeutic delivery. The transfection reagents and equipment market, by end-user, is classified into academic and research institutes and pharmaceutical and biotechnological companies.

The market is segmented based on geography into North America, Europe, Asia Pacific, the Middle East & Africa, and South & Central America. North America is the largest contributor to the global transfection reagents and equipment market growth. Asia Pacific is expected to register the highest CAGR in the transfection reagents and equipment market from 2022 to 2030. 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 insufficient infrastructure and expertise being a major limiting factor. Logistics-related challenges associated with intermediates and final products limit companies' CGT manufacturing capacity. The CGT manufacturing process involves extracting autologous cells through "apheresis," dispatching them to specialized laboratories, and sending them back to clinics for patient administration, 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 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.

ClinicalTrials.com, Centers for Disease Control and Prevention (CDC), World Health Organization (WHO), and Food and Drug Administration (FDA) are a few key primary and secondary sources referred to while preparing the report on the transfection reagents and equipment market.

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