

Non-viral Gene Delivery Technologies Market Size, Share and Growth Outlook 2026: By Mode (Chemical-Based Vectors, Physical-Based Methods), By Material, By Application, By End User, Companies to 2034.

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Abstracts

The global Non-viral Gene Delivery Technologies Market size is forecast to increase from \$4.89 Billion in 2026 to \$12.89 Billion in 2034 at a CAGR of 12.88% between 2026 and 2034.

The Non-viral Gene Delivery Technologies market report provides detailed analysis and outlook of Non-viral Gene Delivery Technologies segments including By Mode (Chemical-Based Vectors, Physical-Based Methods), By Material (Lipid-Based Delivery Systems, Polymer-Based Delivery Systems, Inorganic Nanoparticles, Hybrid Systems), By Application (Therapeutic Applications, Research and Academic Applications), By End User (Pharmaceutical and Biotechnology Companies, Academic and Research Institutes, Contract Research and Manufacturing Organizations (CROs/CDMOs)) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

Non-viral Gene Delivery Technologies Industry Overview

Next-Generation Genetic Medicine Is Accelerating Demand for Non-Viral Delivery Platforms

The non-viral gene delivery technologies industry is emerging as a critical segment within advanced therapeutics, driven by increasing interest in safer, scalable, and more flexible alternatives to viral vectors. Gene therapies, cell therapies, RNA therapeutics,

genome editing technologies, and personalized medicine programs are creating strong demand for delivery systems capable of transporting genetic material efficiently while minimizing immunogenicity and manufacturing complexity. Unlike viral vectors, non-viral platforms offer advantages in production scalability, cargo flexibility, repeat dosing potential, and reduced risk of insertional mutagenesis. As pharmaceutical and biotechnology companies seek to expand the applicability of genetic medicines across rare diseases, oncology, immunology, and metabolic disorders, non-viral delivery technologies are becoming increasingly important components of next-generation therapeutic development.

Cell Engineering Platforms Are Expanding Clinical Applications

A significant trend within the industry is the application of non-viral technologies to engineered cellular therapies. Immusoft strengthened this field through progress with ISP-002, an investigational therapy for Hunter syndrome utilizing its proprietary Immune System Programming (ISP™) platform. The approach modifies autologous B cells ex vivo using a non-viral engineering strategy, enabling continuous production and systemic secretion of therapeutic enzymes. Such technologies demonstrate how non-viral methods are moving beyond laboratory research into clinically relevant therapeutic applications. The ability to engineer patient-derived immune cells without viral vectors is attracting growing attention because it may simplify manufacturing processes while supporting long-term therapeutic protein expression. These developments are expanding the potential role of non-viral delivery systems in rare disease treatment and regenerative medicine.

Hybrid Nanocarriers and Advanced Materials Are Enhancing Delivery Efficiency

One of the primary challenges facing non-viral gene delivery remains achieving high transfection efficiency while maintaining safety and target specificity. Recent research efforts are increasingly focused on optimizing carrier chemistry, surface engineering, and cellular targeting mechanisms to overcome these limitations. Studies published in *Biomedical Chemistry: Research and Methods* highlight advancements in carrier molecule design intended to improve intracellular delivery and tissue-specific targeting. Simultaneously, emerging hybrid nanocarrier technologies are gaining significant attention. Research published in *Pharmaceutics* identifies hybrid systems combining lipids, polymers, and inorganic materials as next-generation delivery platforms capable of co-delivering gene therapies and immunotherapies. These multifunctional carriers are specifically designed to navigate complex biological environments, including heterogeneous tumor microenvironments, while reducing off-target immune clearance.

As innovation continues across nanotechnology, biomaterials, and cell engineering, the industry is progressing toward increasingly sophisticated non-viral delivery solutions capable of supporting broader clinical adoption of genetic medicines.

Non-viral Gene Delivery Technologies Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Non-viral Gene Delivery Technologies market is witnessing increasing investments in innovation, product development, digital transformation, artificial intelligence integration, healthcare infrastructure expansion, and strategic partnerships across developed and emerging economies. Key Companies in the industry include- Thermo Fisher Scientific Inc. , Merck KGaA , Lonza Group AG , Bio-Rad Laboratories, Inc. , Agilent Technologies, Inc. , QIAGEN N.V. , Takara Bio Inc. , Evonik Industries AG , Polyplus-transfection (Sartorius AG) , Precision NanoSystems (Danaher Corporation). The Non-viral Gene Delivery Technologies market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the Non-viral Gene Delivery Technologies industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

- Growth Non-viral Gene Delivery Technologies Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

- Market Trends, Drivers, Potential Opportunities, and Challenges faced by Non-viral Gene Delivery Technologies companies

- Porter's Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

- Detailed SWOT Analysis of global and regional Non-viral Gene Delivery Technologies markets

- Competitive analysis including business description, product analysis, and financial profiles

Key country specific analysis detailing key factors shaping the short-term and long-term outlook

Recent industry developments and news including mergers, acquisitions, product launches, expansions, and company announcements

Non-viral Gene Delivery Technologies Market Competitive Benchmarking and Company Analysis

Leading companies in Non-viral Gene Delivery Technologies industry include- Thermo Fisher Scientific Inc. , Merck KGaA , Lonza Group AG , Bio-Rad Laboratories, Inc. , Agilent Technologies, Inc. , QIAGEN N.V. , Takara Bio Inc. , Evonik Industries AG , Polyplus-transfection (Sartorius AG) , Precision NanoSystems (Danaher Corporation). The Non-viral Gene Delivery Technologies market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US Non-viral Gene Delivery Technologies Markets in 2026 and beyond- Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach \$8.2 Trillion in 2034 from \$5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the Non-viral Gene Delivery Technologies market remains one of the strongest-performing segments in the country.

The US Non-viral Gene Delivery Technologies Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance efficiency and cost management. The US Non-viral Gene Delivery Technologies market faces successive waves of challenging trends, with strong opportunities across select segments. The CMS plan to implement Medicaid

from 2027 is driving states to build eligibility verification systems throughout 2026. Looking ahead to 2034, we anticipate stronger results underpinned by opportunities exist across Non-viral Gene Delivery Technologies industry. On the medical device front, over 7,000 device manufacturers continue to gain from increasing demand from demand for implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of Canadian Non-viral Gene Delivery Technologies markets

Canada's strong Non-viral Gene Delivery Technologies sales performance is underpinned by an aging population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-sized enterprises across medical, diagnostic, and therapeutic devices. The Canadian Non-viral Gene Delivery Technologies market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany Non-viral Gene Delivery Technologies Trends and Perspectives to 2034- Financial sustainability, hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest Non-viral Gene Delivery Technologies market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering 90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of Non-viral Gene Delivery Technologies population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Non-viral Gene Delivery Technologies industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the Non-viral Gene Delivery Technologies market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support Non-viral

Gene Delivery Technologies sales through 2034

France Non-viral Gene Delivery Technologies companies are emphasizing on opportunities for rapid, at-scale innovation to boost profitability over the long-term. The country's National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease management initiatives, workforce reforms, and efforts to improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics. INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were 651,000, producing a negative natural balance of about 6,000 for the first time since the end of the Second World War.

UK Non-viral Gene Delivery Technologies Market Size, Share, and Growth Projections to 2034- Rapid growth driven by new and existing brands across the industry value chain

Small high-need consumer segments remain key priority of Non-viral Gene Delivery Technologies distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or ?280 billion in 2025. According to the ONS, total healthcare spending grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was ?49 billion (14.1%) and voluntary health insurance was ?9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England's plan to give more than 500,000 staff access to new AI tools.

China Non-viral Gene Delivery Technologies Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

China Non-viral Gene Delivery Technologies market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of Non-viral Gene Delivery Technologies industry, offering opportunities for both

competition and partnership. Over the forecast period, new and innovative product launches remain key elements driving market outlook. China's healthcare industry is increasingly centered on expanding healthcare capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China's basic medical insurance covered 1.32662 billion people and the coverage rate was 95%. Regional disparities in consumer spending trends continue to become more pronounced in the Chinese Non-viral Gene Delivery Technologies industry. Over the forecast period, demand will keep shifting toward geriatrics, chronic disease management, rehabilitation, long-term care, and outpatient care, while pricing pressure will remain intense in drugs and consumables because reimbursement.

India Non-viral Gene Delivery Technologies Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian Non-viral Gene Delivery Technologies market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to make world-class diagnostics, robotics, and critical care devices.

Brazil Non-viral Gene Delivery Technologies market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts, with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

Middle East and Africa Non-viral Gene Delivery Technologies Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500 million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader MEA region one of the fastest-growing healthcare demand centers globally. The GCC countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to account for a disproportionately large share of regional healthcare spending. Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria, and Kenya remain key healthcare markets due to their large populations, expanding private healthcare sectors, and growing investments in healthcare delivery systems.

Non-viral Gene Delivery Technologies Market Segmentation

By Mode

Chemical-Based Vectors

Physical-Based Methods

By Material

Lipid-Based Delivery Systems

Polymer-Based Delivery Systems

Inorganic Nanoparticles

Hybrid Systems

By Application

Therapeutic Applications

Research and Academic Applications

By End User

Pharmaceutical and Biotechnology Companies

Academic and Research Institutes

Contract Research and Manufacturing Organizations (CROs/CDMOs)

Leading Companies in Non-viral Gene Delivery Technologies Industry (2026)

Thermo Fisher Scientific Inc.

Merck KGaA

Lonza Group AG

Bio-Rad Laboratories, Inc.

Agilent Technologies, Inc.

QIAGEN N.V.

Takara Bio Inc.

Evonik Industries AG

Polyplus-transfection (Sartorius AG)

Precision NanoSystems (Danaher Corporation)

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia,
Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa,
Other Africa

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By Material

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