FutureBridge

TECHNOLOGY INNOVATIONS

The Potential of Cell and Gene Therapy

In Incontinence Management

Incontinence – At a Glance

Key-Statistics

423 Million

Global Burden

1 Billion Diapers Dumped Per Day

US\$900 to \$1,500

Annual Cost of Managing Incontinence in US

Market Overview

US\$14 Billion

Global Market Size (2021)

7% CAGR

Growth Rate (till 2030)

US\$27 Billion

Estimated Market Size (2030)

Timeline of Developments in Incontinence Management

Medical Devices & Pharmaceuticals

1990 - 2010

.aborie

Coloplast

Cell and Gene **Therapies**

2010 - 2020

UROVANT

innovacell

CreVative® **Biolabs**

MUV®N THERAPEUTICS

>2020

Digital

Solutions

Alaska

US

Countries with

Highest Burden

Germany

China

India

Japan

Nova

RenoVia



Clark Kimberly-Clark

1970 - 1990

Hygiene

Products









😅 CCDOR

Growing Research Focus - CGTs in Incontinence



are surfacing with innovative therapies to address incontinence

Multiple start-ups (10+)

Clinical Trials

among more than 40 clinical trials is on cell therapies

The predominant focus



placed on addressing urinary incontinence compared to its fecal counterpart.

Greater emphasis is



Government bodies as well as pharma giants are funding CGTs to

speed-up their

commercialization

Incontinence Beyond Hygiene Products - Emerging CGTs



SMEs

Cells (MDSCs)

Cells (USCs)

Adipose-derived

stem cells (ADSCs)

pelvic floor tissues. MDSCs offer a novel approach for incontinence therapy,

focusing on strengthening and regenerating pelvic muscles

leveraging their regenerative potential to repair and enhance

ADSCs show promise in incontinence treatment by

to address urinary control issues.

Urine Derived Stem

Muscle-Derived Stem

USCs represent an innovative source for incontinence treatment, utilizing stem cells derived from urine to contribute to the repair of damaged urological tissues.

targeting potassium channels

Gene therapies

targeted intervention to address incontinence at the molecular level.

to optimize neural signals for bladder control, providing a

Precision gene therapies targeting potassium channels aim

UROVANT $\mathscr{E}_{\mathsf{cytori}}$ Sumitomo Pharma

CGTs in Incontinence Management – Player Ecosystem



overactive bladder and urge urinary incontinence, involves a plasmid vector expressing the lpha subunit of K+ channels to reduce bladder hypercontractility. study, demonstrating accelerated regeneration of

UROVANT Developing cell therapy for stress urinary incontinence using autologous muscle precursor cells (MPCs) combined with neuro-muscular electromagnetic stimulation

Phase-2a trial shows promising reductions in

micturition and urgency episodes.

MB-100, an mRNA therapy encoding human insulin-like growth factor-1, aims to treat stress urinary incontinence. FDA cleared for a phase 2a

versameb

(NMES). In Phase II clinical development, targeting regeneration of sphincter muscles. MUV®N THERAPEUTICS

Benefits include long-term effectiveness and use of patient's own muscle cells. innovacell

regenerate sphincter muscles, treating stress

urinary incontinence (SUI) and fecal incontinence.

urinary sphincter muscle in preclinical studies.

Utilizes ICES13 and ICEF15 therapies, based on autologous muscle cells, to

- Conclusion Moving forward, it is crucial to prioritize the long-term safety and efficacy of cell and gene therapies for
- process of cell and gene therapy, from manufacturing to post-delivery patient monitoring. Furthermore, as regulatory frameworks continue to evolve, we foresee a promising trajectory towards

smoother approval processes and broader accessibility of cell and gene therapies in incontinence care.

Looking ahead, we anticipate a surge in the integration of digital technologies throughout the entire

managing incontinence to firmly establish their reliability as sustainable therapeutic solutions.

About FutureBridge

FutureBridge is a techno-commercial consulting and advisory company. We track and advise on the future of industries from a 1-to-25-year perspective to keep you ahead of the technology curve, propel your growth, Identify new opportunities, markets and business models, answer your unknowns, and facilitate best-fit solutions and partnerships using our platforms, programs, and access to global ecosystems and players.