

Vaccine Contract Manufacturing - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2021 - 2029

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Report description:

The Vaccine Contract Manufacturing Market size is estimated at USD 3.51 billion in 2024, and is expected to reach USD 5.98 billion by 2029, growing at a CAGR of 11.18% during the forecast period (2024-2029).

The COVID-19 pandemic had a profound impact on the vaccine contract manufacturing market. During the outbreak of the pandemic, there was a shortage of vaccines for all diseases due to the lockdown, which hampered the growth of the vaccine contract manufacturing market. However, R&D and clinical trials across the world accelerated to provide a safe and effective vaccine, thus increasing the demand and manufacturing of vaccines, eventually driving the growth of the market. Increased demand for vaccines resulted in increased investment needs for the manufacturing and clinical trial infrastructure. For instance, as per a press release by the United Nations International Children's Emergency Fund (UNICEF) in October 2021, a new ACT-Accelerator strategy was planned, which called for a USD 23.4 billion international investment to address disparities in the availability of COVID-19 diagnostics, vaccinations, and therapies worldwide. The market has recovered since the manufacturing restrictions were lifted. The vaccine contract manufacturing market is expected to show a stable growth rate during the forecast period.

In addition, the advancements in technology and cost benefits in infrastructure and operational benefits, increase in initiatives favoring vaccinations, and favorable patient demographics, and growing vaccinations of newborns and children are actively affecting the growth of the market studied.

The initiatives taken by various governments and health organizations all over the world focusing on providing vaccinations to all people are driving the growth of the vaccine contract manufacturing market in the forecast period. For instance, as per the World Health Organization, in February 2022, Djibouti's Ministry of Health, with technical support from WHO and UNICEF, launched a

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five-day national polio vaccination campaign to vaccinate approximately 150,000 children in Djibouti. These vaccine drives focusing on preventive measures for various diseases are likely to drive the growth of the market in the forecast period.

Furthermore, technological advancements in vaccine technology have been fueled by the introduction of genetic engineering, vaccine-delivering technology, and proteomics. Currently, it is resulting in the entry of new products. For instance, according to the article published by the Association of American Medical Colleges (AAMC) in March 2021, mRNA technology promises to revolutionize future vaccines and treatments for cancer and infectious diseases. Researchers claim that mRNA can be used to create a variety of vaccines and treatments in less time and at lower costs than traditional methods. Thus, the advantage of new technology like mRNA to create vaccines is expected to drive the market's growth.

Additionally, rising strategic initiatives adopted by key players, such as business expansion, partnerships, and acquisitions, are estimated to propel the market's growth. For instance, in March 2022, Bharat Biotech entered into a partnership with the Spanish biopharmaceutical firm, Biofabri for the development, manufacturing, and marketing of a new tuberculosis vaccine. The new TB vaccine, MTBVAC, is being manufactured and developed by Biofabri in close collaboration with the University of Zaragoza, the International AIDS Vaccine Initiative (IAVI), and the Tuberculosis Vaccine Initiative (TBVI). Such developments by market players are also boosting the growth of the vaccine contract manufacturing market in the study period.

The increase in the necessity of vaccine contract manufacturing around the world is expected to propel the growth of the market studied. However, the increasing cost of vaccines, along with the lack of storage infrastructure, is likely to hinder the growth of the market in the forecast period.

Vaccine Contract Manufacturing Market Trends

The Inactivated Vaccines Segment is Expected to Hold a Significant Share in the Vaccine Contract Manufacturing Market over the Forecast Period

The inactivated vaccines contain whole bacteria or viruses that have been killed or manipulated to prevent replication. As these vaccines do not contain any live bacteria or viruses, they cannot spread the diseases they are intended to prevent, even in those with highly compromised immune systems, which is one of the major advantages of this type of vaccine.

These vaccines do not produce or confer immunity as strong as live-attenuated vaccines. Hence, several doses of inactivated vaccines are required over time for better immune response. The high burden of the target diseases, regular demand for these vaccines as a preventive measure, and the emergence of the COVID-19 pandemic are expected to significantly impact the segment's growth over the forecast period.

In addition, the companies, as well as researchers from academics, are actively involved in the research and development of inactivated vaccine candidates for different indications, some of which are even approved by the health authorities. Hence, due to these factors, the inactivated vaccine segment is expected to grow. For instance, as of April 2022, the World Health Organization has approved ten vaccines against COVID-19, of which three are inactivated types and include CoronaVac (Sinovac), Sinopharm, and COVAXIN (Bharat Biotech).

Furthermore, in April 2022, the Central Drugs Standard Control Organization (CDSCO) of India provided emergency use approval to Bharat Biotech's COVAXIN for children between 6-12 years of age. Thus, the rise in the research and development of the production of inactivated vaccines and the advantages of inactivated vaccines over conventional vaccine treatments are expected to influence the growth of the vaccine contract manufacturing market in the forecast period.

North America is Expected to Hold a Significant Market Share over the Forecast Period

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The rise in the adoption of highly advanced techniques and systems in vaccine manufacturing and the technological advancements made in vaccine research and development studies is expected to boost the growth of the market in the North American region. The high awareness among the population about the availability of vaccines in the market contributes to the high market growth in the region.

According to data published by the American Academy of Pediatrics in March 2022, more than 1 million people in the United States have long-term hepatitis B infections, and people who are infected with hepatitis B as a baby have a 90% chance of developing serious, chronic conditions like liver cancer in their lifetime. Thus, an increase in hepatitis B is expected to increase the demand for vaccines and their manufacturing, thereby driving the growth of the market.

Additionally, according to the WHO Updates in July 2022, the United States has been involved in polio-eradication efforts, both as a partner and the second-largest donor to the Global Polio Eradication Initiative and as a supporter of developing-country efforts. Polio funding in the United States is estimated to have been USD 253 million in 2022. Furthermore, in January 2021, the United States Department of Health and Human Services (HHS) launched the HPV VAX NOW campaign to increase human papillomavirus (HPV) vaccination rates among young adults aged 18-26. Thus, the increasing necessity for vaccine contract manufacturing coupled with increasing investment in the health care department is likely to propel the growth of the market in this region.

The government initiatives undertaken for vaccination awareness also propel the market's growth during the forecast period. For instance, in August 2022, the Government of Canada published the Canadian Immunization Guide Chapter on Influenza and Statement on Seasonal Influenza Vaccine for 2022-2023, which provides updated recommendations regarding the use of seasonal influenza vaccines in Canada. For instance, the government authorized the use of Supemtek (RIV4), a recombinant quadrivalent seasonal influenza vaccine, for use in Canadian adults of age 18 and older. Such initiatives favor vaccination in the region and thereby boost the growth of the market during the forecast period.

Vaccine Contract Manufacturing Industry Overview

The vaccine contract manufacturing market is fragmented and competitive and consists of several major players. In terms of market share, a few of the major players are currently dominating the market. Some companies which are currently dominating the market are Ajinomoto Bio-Pharma Services, Curia Global, Catalent, Charles River Laboratories International Inc., Emergent BioSolutions Inc., CJ CheilJedang Corporation (Batavia Biosciences), Gedeon Richter (Richter-Helm BioLogics, Fujifilm Holdings Corporation, ICON PLC, IDT Biologika GmbH, Lonza Group AG, and Recipharm AB, among others.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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