Vaccine Contract Manufacturing Market, 2016 - 2026

Description: The "Vaccine Contract Manufacturing Market, 2016 – 2026" report provides an extensive study of the current market landscape of CMOs focused on vaccines. The study presents an in-depth analysis of a diverse set of biopharmaceutical CMOs based on key parameters such as geographical location, scale of operation, use of expression systems and manufacturing capabilities. In addition, it captures some of the potential growth areas that will likely present tremendous opportunities for vaccine CMOs and contribute to an accelerated pace of growth.

The report assesses the key drivers that have governed the evolution of vaccine contract manufacturing market over the past several years, along with an elaborate discussion on the future trends that are likely to shape the market in the coming years. One of the focus areas of this study is to estimate size of the future opportunity for vaccine CMOs market over the next decade, segmented on the basis of business operations, type of expression systems and key regions.

The study also provides information on some of the most important aspects of vaccine outsourcing; these include growing collaborations, investment activity, facility expansions and technological advances. In addition to some of the well-known benefits and a promising outlook, the study highlights considerable challenges that are currently prevalent in the market. Examples include quality concerns, stringent regulations and lack of funding. Nevertheless, these challenges are resulting in new strategies and technological improvements, which are likely to prove advantageous in the long run.

The base year for the report is 2016; it provides market forecasts for the period 2016 - 2026. The research, analysis and insights presented in this report is backed by a deep understanding of key insights gathered both from secondary and primary research.

Example Highlights

- Vaccine development and manufacturing, characterized by complex production processes and high entry barriers, is set in a highly regulated market landscape. Outsourcing has emerged as a rising trend in this domain and gained a lot of traction in the last few years. As the market continues to evolve, CMOs are rapidly enhancing their service offering to offer end-to-end services to their clients.
- Developed regions, such as North America and Europe, currently dominate the vaccine contract manufacturing market. Of the 79 CMOs we identified, 41 have presence in multiple locations in the US. In Europe, the other major hub for CMOs, 20 CMOs have facilities located in Germany, France and the UK alone.
- CMOs in emerging locations have also gained ground. With increasing support from local governments, many low-income geographies have restructured their indigenous regulatory landscape. Intellectual property protection laws have been made more stringent in favor of foreign sponsors looking to outsource business operations in the same regions. Established players in this market have also received the necessary qualifications and certifications to provide services in compliance with global standards.
- Out of 79 CMOs, 21 offer end-to-end services across preclinical, clinical and commercial scale. We observed a rapid adoption of mammalian and insect production technologies among service providers.
- The highly competitive market landscape is abuzz with partnership activity. We have identified 128 unique partnerships that were inked in the recent past. Of these, a sizeable proportion (25%) is mergers / acquisitions. We believe this trend is likely to continue in the future.
- Technological advances are amongst the major driving factors in this market. The introduction of novel expression systems, such as the EB66® and GPEX® cell lines, and cell culture media platforms have sustained the interest of players in this field. Single use / disposable technologies, a key bio-manufacturing trend, are also becoming more and more popular among contract manufacturers. This is representative of the current market intensity.
- Driven by increasing global demand and the rapidly expanding vaccine market, we expect the overall contract manufacturing market in this space to grow at an annualized rate of 9.8%. The rate of growth is likely to vary significantly across different segments / activities and across geographical regions.

Research Methodology
Most of the data presented in this report has been gathered via secondary and primary research. For all our projects, we conduct interviews with experts in the area (academia, industry, medical practice and other associations) to solicit their opinions on emerging trends in the market. This is primarily useful for us to draw out our own opinion on how the market will evolve across different regions and technology segments. Where possible, the available data has been checked for accuracy from multiple sources of information.

The secondary sources of information include

- Annual reports
- Investor presentations
- SEC filings
- Industry databases
- News releases from company websites
- Government policy documents
- Industry analysts' views

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