

The viral and non-viral vector manufacturing market, By Roots Analysis

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/EINPresswire.com/ -- The rapidly growing pipeline of genetically modified therapies reflects the surge in demand for high quality vectors, presenting lucrative opportunities for companies with the capabilities to manufacture viral and non-viral gene delivery solutions

London

[Roots Analysis](#) has announced the addition of "[Viral Vectors, Non-Viral Vectors and Gene Therapy Manufacturing Market \(4th Edition\) 2021 - 2030](#)" report to its list of offerings.

Over time, ~15 cell and gene therapies have been approved across the world. Since transgene delivery into biological producing cell lines, gene modified cell-based therapies and the body, is an indispensable aspect of modern drug / therapy development efforts, high quality vectors are required by both medical researchers, drug developers and manufacturing service providers, alike. In order to save time and costs, many stakeholders in the cell and gene therapy market have opted to outsource their vector manufacturing needs.

To order this 685+ page report, which features 170+ figures and 290+ tables, please visit https://www.rootsanalysis.com/reports/view_document/viral-vectors-non-viral-vectors-and-gene-therapy-manufacturing-market

Example highlights
Presently, over 200 industry and non-industry players claim to have the necessary capabilities to manufacture different types of viral and non-viral vectors, for in-house requirements and / or contract service engagements

List of Vector and Gene Therapy Manufacturers

S. No.	Company	YoE	Headquarters	Scale of Operation			Purpose of Production		Production Capacity	Application Area		
				Preclinical	Clinical	Commercial	CMO	In-House		Gene Therapy	Cell Therapy	Vaccine
16	BioReliance	1947	USA	✓	✓	✓	✓	✓	1,000 L installed capacity 500 L and 50 L bioreactors	✓	✓	✓
23	OSMA	1992	UK	✓	✓	✓	✓	✓		✓	✓	✓
39	Vigene Bioscience	2012	UK	✓	✓	✓	✓	✓		✓	✓	✓
48	CEVECO	2001	Germany	✓	✓	✓	✓	✓		✓	✓	✓
62	LUNARIL	2016	UK	✓	✓	✓	✓	✓		✓	✓	✓
70	GENESCULPT	1998	USA	✓	✓	✓	✓	✓		✓	✓	✓
97	KRYVIA	2019	USA	✓	✓	✓	✓	✓		✓	✓	✓
129	exothena	2020	UK	✓	✓	✓	✓	✓		✓	✓	✓

Information on over 135+ Industry Players is available in the full report

Non-Industry Players

S. No.	Organization	YoE	Headquarters	Preclinical	Clinical
5	University of Florida	1898	USA	✓	✓
35	University of Florida	1995	USA	✓	✓
80	University of Oxford	2005	UK	✓	✓

Information on 85+ Non-Industry Players is available in the full report
Abbreviations: YoE: Year of Establishment and CMO: Contract Manufacturing Organization

Distribution by Type of Vector Manufactured

- AAV Vectors: 55%
- Adenoviral Vectors: 34%
- Lentiviral Vectors: 52%
- Retroviral Vectors: 19%
- Plasmid DNA: 46%
- Other Vectors: 26%

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Viral Vectors, Non-Viral Vectors and Gene Therapy Manufacturing Market

Example highlights
Case Study: Novel viral and bacterial strains, such as Sendai virus and *Bifidobacterium longum*, are currently being investigated as vectors, for the development of effective, genetically modified therapies / vaccines

Emerging Vectors
In-House Developers / Contract Service Providers Landscape and Executive Insights

Details on upcoming vectors is available in the report titled "[Viral Vectors, Non-Viral Vectors and Gene Therapy Manufacturing Market \(4th Edition\), 2021-2030](#)"

35%+
Players claim to offer manufacturing services for emerging vectors, most such stakeholders have expertise to carry out manufacturing operations at both preclinical and clinical scale

Upcoming Vector Types

- Virus Based**
 - Alphavirus
 - Anc80 (Synthetic AAV)
 - Cytomegalovirus
 - Herpes Simplex Virus
 - Modified Vaccinia Ankara
 - Mycoplasma Virus
 - Sendai Virus
 - Sindbis Virus
 - Vaccinia Zoster Virus
- Bacteria Based**
 - Bifidobacterium Longum
 - Listeria Monocytogenes
- Others (DNA / Transposon)**
 - Mincircle DNA
 - Sleeping Beauty
 - PiggyBac

Example Players

Key Stocks

Excerpts from Primary Research

Executive & Scientific Offices, a small-sized company:
"We believe that a few novel vectors, having low immunogenicity and the ability to target different cell types, are likely to be introduced in the market in the foreseen future. In fact, currently, several players are actively exploring the use of different (better) versions of adeno-associated viral vectors."

Project Manager and Marketing Manager, a small-sized company:
"In order to overcome the challenges associated with contamination of final products, we are developing a minicircle DNA-based vector, which lacks antibiotic resistance genes and other prokaryotic plasmid components that are crucial for the replication of these constructs in bacteria."

Note: The companies (developer / CMO) shown here may not be exhaustive

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Viral Vectors, Non-Viral Vectors and Gene Therapy Manufacturing

Key Market Insights

The market features the presence of over 225 industry players and non-industry players

It is currently dominated by the presence of mid-sized players (51-500 employees), which represent more than 55% of industry stakeholders, worldwide. Of these, ~80% are capable of synthesizing different types of viral vectors, and round 10% of the companies mentioned in the report claim to have expertise in manufacturing plasmid DNA.

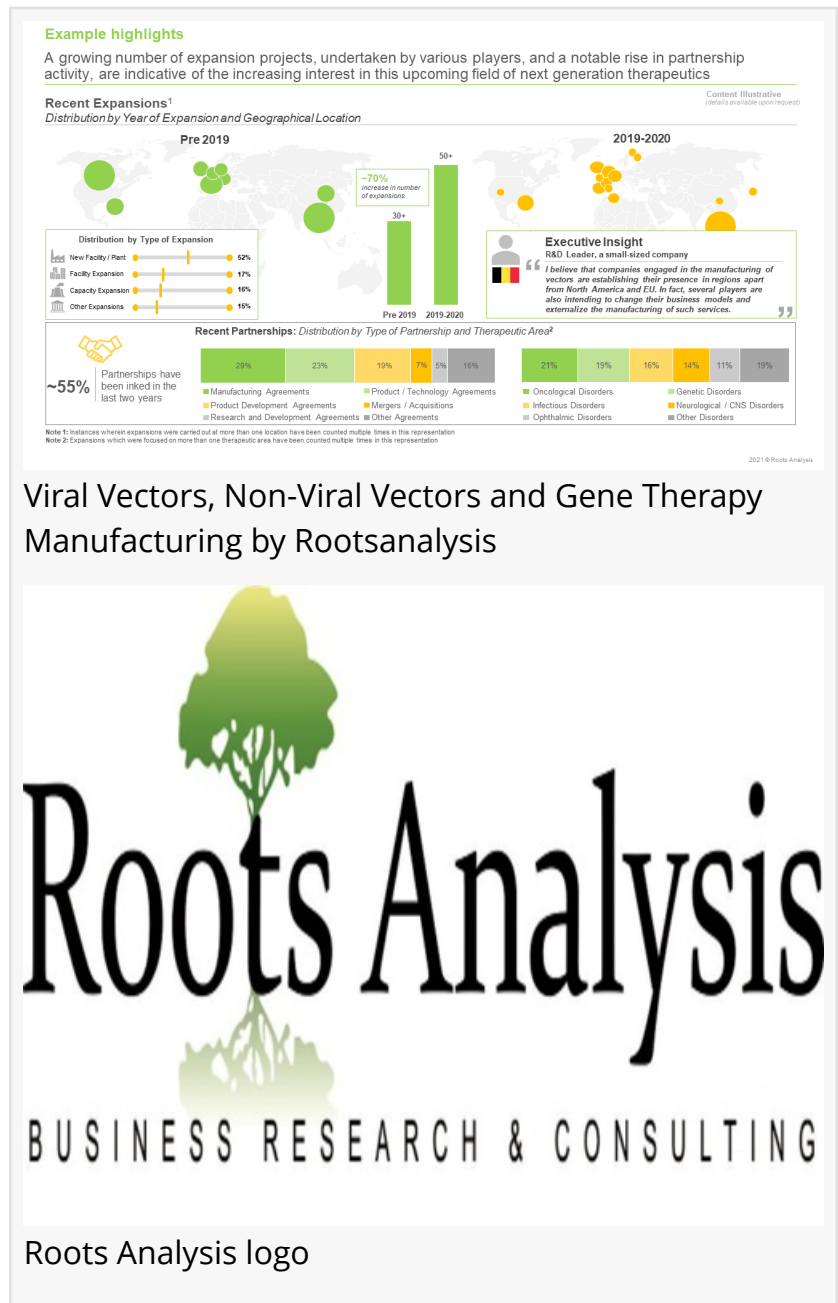
Over the time, several new technology platforms have been developed to deal with existing production-related challenges

Majority (85%) of the available technologies are currently focused on viral vectors. The technology landscape analysis featured in the report, highlights the fact that 55% of the contemporary platforms are meant for the development and production of gene therapies.

Close to 210 partnerships were inked in this market, over the last five years. More than 55% of partnerships were inked post 2017, with the maximum activity being reported in 2020 (till September). Most of the deals (~27%) were manufacturing agreements, followed by product / technology licensing (24%), product development (17%) and R&D (9%) agreements.

Expansion activity in this domain has grown at a CAGR of 97%, between 2015 and 2020. Most of the reported expansions were related to the establishment of new facilities / plants (52%), followed by facility expansions (22%), indicative of the initiatives undertaken by service providers to cope with the rapidly increasing demand for good quality vectors. □

The installed vector manufacturing capacity is estimated to be 63,000+ L



The majority share of the available vector manufacturing capacity belongs to companies with both clinical and commercial scale facilities (~70%). In fact, 65% of the estimated global vector producing capacity belongs to the larger and more established stakeholders in the market.

Till 2030, the annual demand for vectors is expected grow at an annualized rate of 21%. Currently, North America and Europe contribute to more than 70% of the demand for viral and non-viral vectors. By 2030, the demand, in terms of number of patients in need to interventions requiring some form of vector, is projected to be over 220,000.

The developed markets are likely to remain the major contributors, in terms of service revenues, to the market

The majority share of service revenues is anticipated to come from vector manufacturing project for oncological disorders (~55%). By 2030, the need for gene delivery solutions for commercialized therapies, is expected to be responsible for 60% of the annual service revenues, representing a CAGR of 39%.

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Key Questions Answered

□ Who are the leading players (contract service providers and in-house manufacturers) engaged in the development of vectors and gene therapies?

□ Which global regions are the considered as (contract) manufacturing hubs for vectors and gene therapies?

□ What kind of technologies are used / being developed by stakeholders engaged in this domain?

□ What kind of companies are likely to partner with vector manufacturing service providers?

□ Which types of partnership models are commonly adopted by stakeholders in this industry?

□ What are the different types of expansions that have been undertaken by vector manufacturers?

□ What are the emerging types of viral and non-viral vectors used in the manufacturing of genetically modified therapies?

□ How has the COVID-19 pandemic impacted the viral and non-viral vector, and [gene therapy manufacturing market](#)?

□ What is the current, global demand for viral and non-viral vectors, and gene therapies?

□ How is the current and future market opportunity likely to be distributed across key market segments?

The USD 2.5+ billion (by 2030) financial opportunity associated with viral vector, non-viral vector and gene therapy manufacturing market has been analyzed across the following segments:

□ Scale of operation

□ Lab

- Clinical
- Commercial

□ Type of Vector

- AAV
- Adenoviral
- Lentiviral
- Retroviral
- Plasmid DNA
- Others

□ Application Area

- Gene Therapy
- Cell Therapy
- Vaccine

□ Therapeutic Area

- Oncological Disorders
- Inflammation & Immunological Disorders
- Neurological Disorders
- Ophthalmic Disorders
- Muscle Disorders
- Metabolic Disorders
- Cardiovascular Disorders
- Others

□ Geographical Regions

- North America
- Europe
- Asia-Pacific
- MENA
- Latin America and Rest of the World

The report also features inputs from eminent industry stakeholders, according to whom, the anticipated increase in demand for cell and gene therapies, is the most prominent driver of the growth of the vector supply market. The report includes detailed transcripts of discussions held with the following experts:

- Menzo Havenga (Chief Executive Officer and President, Batavia Biosciences)
- Nicole Faust (Chief Executive Officer & Chief Scientific Officer, CEVEC Pharmaceuticals)
- Jeffrey Hung (Chief Commercial Officer, Vigene Biosciences)
- Cedric Szpirer (Founder, Executive & Scientific Director, Delphi Genetics)
- Olivier Boisteau, (Co-Founder / President, Clean Cells), Laurent Ciavatti (Ex-Business

Development Manager, Clean Cells) and Xavier Leclerc (Head of Gene Therapy, Clean Cells)

- Alain Lamproye (Ex-President of Biopharma Business Unit, Novasep)
- Jobst van den Berg (Ex-Director, Amsterdam BioTherapeutics Unit)
- Bakhos A Tannous (Director, MGH Viral Vector Development Facility, Massachusetts General Hospital)
- Eduard Ayuso, DVM, PhD (Scientific Director, Translational Vector Core, University of Nantes)
- Colin Lee Novick (Managing Director, CJ Partners)
- Semyon Rubinchik (Scientific Director, ACGT)
- Astrid Brammer (Senior Manager Business Development, Richter-Helm)
- Marco Schmeer (Project Manager, Plasmid Factory) and Tatjana Buchholz (Ex-Marketing Manager, Plasmid Factory)
- Brain M Dattilo (Business Development Manager, Waisman Biomanufacturing)
- Beatrice Araud (ATMP Key Account Manager, EFS-West Biotherapy)
- Nicolas Grandchamp (R&D Leader, GEG Tech)

The research includes profiles of key players (listed below), featuring a brief overview of the company, its financial performance (if available), information related to its manufacturing facilities, proprietary vector manufacturing technology and an informed future outlook.

- Advanced BioScience Laboratories
- Aldevron
- Audentes Therapeutics
- BioReliance
- Brammer Bio
- Bluebird bio
- Emergent BioSolutions
- EUJIFILM Diosynth Biotechnologies
- MeiraGTx
- MassBiologics
- Spark Therapeutics
- Vigene Biosciences
- Biovian
- Cobra Biologics
- Centre for Process Innovation
- BinVector
- Kaneka Eurogentec
- Lonza
- MolMed
- Novasep
- Orchard Therapeutics
- Oxford BioMedica
- Richter-Helm
- Sanofi
- UniQure

▣Vibalogics
▣VIVEbiotech
▣Cell and Gene Therapy Catapult
▣Wuxi AppTec

For additional details, please visit

https://www.rootsanalysis.com/reports/view_document/viral-vectors-non-viral-vectors-and-gene-therapy-manufacturing-market-/274.html or email sales@rootsanalysis.com

You may also be interested in the following titles:

1. Gene Therapies Market (4th Edition) by Therapeutic Approach (Gene Augmentation, Oncolytic Viral Therapy, Immunotherapy and Others), Type of Gene Therapy, Type of Vectors Used, Therapeutic Areas (Autoimmune Disorders, Cardiovascular Diseases, Genetic Disorders, Hematological Disorders, Metabolic Disorders, Muscle-related Diseases, Oncological Disorders, Ophthalmic Diseases and Others), Route of Administration, and Key Geographical Regions: Industry Trends and Global Forecasts, 2020-2030
2. Global T-Cell (CAR-T, TCR, and TIL) Therapies Market (5th Edition): Distribution by Type of Therapy (CAR-T, TCR and TIL), Target Indications (Acute Lymphoblastic Leukemia, NHL, Melanoma, Bladder Cancer, Lung Cancer, Head and Neck Cancer, Multiple Myeloma and Others), Target Antigens (CD19, BCMA, CD19/22, EGFR, NY-ESO-1, gp100 and others), Key Players and Key Regions (North America, Europe, Asia Pacific, Latin America, MENA, and Rest of the World): Industry Trends and Global Forecasts, 2021-2030
3. Biopharmaceutical Contract Manufacturing Market (4th Edition) by Type of Product (API, FDF), Scale of Operations (Preclinical, Clinical and Commercial), Expression System (Mammalian, Microbial and Others), Company Size (Small, Mid-sized, Large and Very Large), Biologics (Antibody, Vaccine, Cell Therapy and Other Biologics) and Key Geographical Regions (North America, Europe, Asia-Pacific, MENA and LATAM)- Industry Trends and Global Forecast to 2030
4. Cell and Gene Therapy CROs Market by Type of Therapy (Cell Therapy (Stem Cells, Immune Cells and Others) and Gene Therapy), Scale of Operation (Drug Discovery, Preclinical, Clinical and Commercialization), Preclinical Services Offered, Clinical Services Offered, and Geography (North America, Europe, Asia-Pacific, Latin America, MENA and Rest of the World): Industry Trends and Global Forecasts (2nd Edition), 2021-2030

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