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Vaccine Adjuvants Market By Type (Immunostimulants, Vehicles and Mucosal Adjuvants), By Disease (Infectious Diseases, Others), By Application (Research, Commercial): Global Opportunity Analysis and Industry Forecast, 2024-2035

https://marketpublishers.com/r/V909C2F1B472EN.html
Date: December 2024
Pages: 339
Price: US$ 2,655.00 (Single User License)
ID: V909C2F1B472EN

Abstracts

The vaccine adjuvants market was valued at $820.2 million in 2023 and is estimated to reach $1,304.83 million by 2035, exhibiting a CAGR of 3.9% from 2024 to 2035.

Vaccine adjuvants are substances added to vaccines to enhance the body's immune response to the target antigen, allowing for a stronger, faster, or more prolonged immunity. Functionally, adjuvants work by stimulating immune cells or activating specific immune pathways, by mimicking infection signals that prompt the immune system to initiate a protective response. This response can improve the efficacy of vaccines, reducing the amount of antigen needed or the number of doses required. Vehicular adjuvants enhance stability, transport the antigen, and facilitate the immune system's recognition and response.

Adjuvants offer advantages such as boosting immunity in older or immunocompromised individuals and enabling broad protection against multiple pathogens. Types of adjuvants include aluminum salts (alum), which are widely used for their safety and efficacy; oil-in-water emulsions like MF59 and AS03, which enhance antigen uptake; and novel types such as liposomes, saponins, and nanoparticle-based adjuvants that offer targeted delivery and controlled release. The adjuvant types are selected based on their ability to enhance immune responses specific to the disease being targeted, thus playing a crucial role in developing effective and efficient vaccines.

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The vaccine adjuvants market is driven by rise in demand for more effective vaccines, especially in emerging infectious diseases and chronic conditions. Rise in incidence of infectious diseases, including flu, hepatitis, COVID-19, and various bacterial infections, emphasize the need for innovative vaccine solutions that rovide broad protection,thereby driving the demand for vaccines. For instance, according to an article published by World Health Organization (WHO) in 2023, 116 million people were living with hepatitis B and 10 million with hepatitis C in the Western Pacific Region. This incidence highlights the ongoing need for effective vaccines and adjuvants to support immune responses, particularly in high-risk populations, thereby driving the vaccine adjuvants market growth.

Vaccine adjuvants enhance the immune response to antigens, making vaccines more effective and potentially reducing the number of doses required, which is particularly beneficial in regions with limited healthcare access. In addition, the government funding and initiatives supporting vaccine development also play a significant role in the growth of the vaccine adjuvants market. Agencies such as the World Health Organization (WHO) and governments globally are investing in vaccine research and production to improve global immunization rates. For instance, in August 2023, the U.S. Department of Health and Human Services announced over $1.4 billion in funding through Project NextGen. This includes $1 billion for vaccine clinical trials, $326 million for new monoclonal antibody treatments, and $100 million to explore novel vaccine technologies, aimed at advancing COVID-19 vaccine development and therapeutics.

In addition, rise in collaborations between pharmaceutical companies and research institutions is leading to the development of new adjuvants with enhanced efficacy and safety. For instance, in October 2023, SPI Pharma, Inc., (SPI) and Q-Vant Biosciences, Inc. partnered to leverage Q-Vant's leadership in unique, sustainable saponin extraction technology with SPI's global pharmaceutical reach and expertise in servicing the industry. The investment commitment to expand commercial-scale GMP manufacturing of high-purity saponins, along with the exclusive commercial agreement, will enable global pharma customers to access a sustainable, scalable, and fully integrated supply of saponin adjuvants. These partnerships are accelerating research and development, thus propelling the growth of the vaccine adjuvants market.

However, high costs associated with research, development, and production are expected to restrain the market growth. Adjuvant development requires significant investment in specialized technologies and stringent testing to ensure safety and efficacy, which increases manufacturing costs. For many companies, these high initial

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costs pose a barrier to entry, limiting the number of players in the market and reducing the competitive landscape. In addition, stringent regulatory requirements for vaccine adjuvants, particularly in regions with rigorous approval standards, further restrict the market growth.

However, rise in vaccination programs in emerging countries, along with a focus on personalized and therapeutic vaccines, further enhance growth opportunities for the market, as more pharmaceutical and biotech companies invest in new adjuvant technologies to meet diverse and growing healthcare needs globally. In addition, rise in advancements in vaccine development and high growth potential in emerging countries provide an opportunity for the market growth.

The vaccine adjuvants market is segmented into type, disease, application, and region. By type, the market is bifurcated into immunostimulants and vehicles & mucosal adjuvants. The immunostimulants segment is further classified into toll-like receptor (TLR) and others. By disease, the market is segregated into infectious diseases and others. The infectious diseases segment is further classified into hepatitis and others. By application, the market is bifurcated into research and commercial. Region-wise, the market is analyzed across North America (U.S., Canada, and Mexico), Europe (Germany, France, UK, Italy, Spain, and rest of Europe), Asia-Pacific (Japan, China, India,Australia, South Korea, and rest of Asia-Pacific), and Latin America (Brazil, Colombia, Argentina, and Rest of LA), and Middle East Africa (GCC, South Africa, North Africa, and Rest of MEA).

Major key players that operate in the global vaccine adjuvants market are Dynavax Technologies Corporation , Novovax, Agenus Inc., Adjuvatis, Air Liquide Group, Aurorium, InvivoGen, Associated British Foods, GlaxoSmithKline plc., and Croda International Plc. Key players operating in the market have adopted agreement, acquisition, partnership, clinical trials, and product approval as their key strategies to expand their product portfolio. For instance, in May 2024, Novavax, Inc. entered into a co-exclusive licensing agreement with Sanofi. The terms of the agreement include a co-exclusive license to co-commercialize Novavax's current stand-alone adjuvanted COVID-19 vaccine worldwide.

Key Benefits For Stakeholders

This report provides a quantitative analysis of the market segments, current trends, estimations, and dynamics of the vaccine adjuvants market analysis from 2023 to 2035 to identify the prevailing vaccine adjuvants market opportunities.

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The market research is offered along with information related to key drivers, restraints, and opportunities.

Porter's five forces analysis highlights the potency of buyers and suppliers to enable stakeholders make profit-oriented business decisions and strengthen their supplier-buyer network.

In-depth analysis of the vaccine adjuvants market segmentation assists to determine the prevailing market opportunities.

Major countries in each region are mapped according to their revenue contribution to the global market.

Market player positioning facilitates benchmarking and provides a clear understanding of the present position of the market players.

The report includes the analysis of the regional as well as global vaccine adjuvants market trends, key players, market segments, application areas, and market growth strategies.

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Additional company profiles with specific to client's interest

Additional country or region analysis- market size and forecast

Expanded list for Company Profiles

Historic market data

SWOT Analysis

Key Market Segments

By Type

Immunostimulants

Type

Toll like receptor

Others

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Vehicles and Mucosal Adjuvants

By Disease

Infectious Diseases

Type

Hepatitis

Others

Others

By Application

Research

Commercial

By Region

North America

U.S.

Canada

Mexico

Europe

Germany

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UK

Italy

Spain

Rest of Europe

Asia-Pacific

Japan

China

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Rest of Asia-Pacific

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Brazil

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Argentina

Rest of Latin America

Middle East and Africa

Gcc

South Africa

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North Africa

Rest of Middle East And Africa

Key Market Players

Agenus Inc.

Novovax Inc.

Aurorium

Air Liquide Group

Adjuvatis

InvivoGen

Associated British Foods

GlaxoSmithKline plc.

Croda International Plc

Dynavax Technologies Corporation

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