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# Global AAV Affinity Chromatography Resins Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global AAV Affinity Chromatography Resins market size was valued at US$ 13.44 million in 2025 and is forecast to a readjusted size of US$ 32.45 million by 2032 with a CAGR of 13.0% during review period.

AAV Affinity Chromatography Resins are high-value bioprocess chromatography media designed for the selective capture and primary purification of adeno-associated virus capsids during viral vector manufacturing. These products immobilize AAV-binding ligands, including single-domain antibodies, recombinant proteins, engineered protein scaffolds and synthetic peptides, onto cross-linked agarose or rigid polymer bead matrices. Commercial products are supplied mainly as loose bulk resins and prepacked columns, with validated formats ranging from milliliter-scale process-development packs to multi-liter manufacturing volumes. Key performance parameters include serotype coverage, dynamic binding capacity, pressure-flow behavior, recovery, impurity clearance, elution conditions, alkaline cleaning tolerance, ligand leakage and reusable cycle life. The market covers pan-serotype, limited multi-serotype and serotype-specific products used to capture AAV vectors produced through HEK293, Sf9 and other manufacturing platforms. Primary applications extend from resin screening and purification process development to clinical-stage GMP production, process validation, technology transfer, second-site qualification and commercial-scale viral vector manufacturing. As an upstream biopharmaceutical process material, AAV Affinity Chromatography Resins directly influence purification yield, process consistency, facility productivity, regulatory readiness and the overall economics of gene therapy manufacturing.

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## Key Findings

Global equivalent sales volume reached approximately 180 liters in 2025 and is estimated at about 220 liters in 2026

Average selling prices remain close to US$70,000 per liter due to low-volume and high-value bioprocess economics

Pan-serotype and multi-serotype products are gaining importance in platform-based AAV purification development

North America remains the largest demand center while China is expanding localized supply and second-source validation

Competition remains concentrated among a limited number of technically validated global and Chinese manufacturers

## Market Trends

The development direction of AAV Affinity Chromatography Resins is shifting from basic capsid capture toward broader serotype coverage, higher productivity and stronger lifecycle performance. Gene therapy developers increasingly prefer resins that can support multiple natural and engineered capsids within a common purification platform, reducing repeated ligand screening and process redevelopment as product pipelines expand. At the same time, customers are placing greater emphasis on dynamic binding capacity at short residence times, rigid matrices with improved pressure-flow characteristics, mild elution conditions that protect capsid integrity, and alkaline-stable ligands that permit more cleaning cycles. The market is also moving toward scalable product families that connect small-volume screening formats with prepacked development columns and multi-liter GMP supply. Regional supply security is becoming another important purchasing criterion, particularly as developers qualify second sources and additional manufacturing sites. These changes favor suppliers able to combine ligand discovery, matrix engineering, reproducible coupling, application data, regulatory documentation and long-term manufacturing support rather than competing only through nominal binding capacity.

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# Market Dynamics

## Drivers

Demand growth is primarily supported by the progression of AAV gene therapy programs from early clinical development into larger Phase II, Phase III and commercial manufacturing campaigns. Resin consumption per active project rises materially as processes move from screening and laboratory columns to engineering batches, validation campaigns and multi-site production. High-dose systemic therapies, expansion of viral vector CDMO capacity, qualification of backup manufacturing locations and increased use of platform purification processes further support resin demand. The requirement for higher recovery, consistent impurity removal and scalable GMP processing also encourages replacement of less selective purification approaches with dedicated AAV affinity capture steps.

## Restraints

Market expansion is moderated by the small number of commercial AAV products, long development timelines and uncertainty surrounding the clinical success of individual gene therapy programs. AAV affinity resins are expensive to qualify and replace because changes to the capture step may require comparability studies, process revalidation and additional regulatory documentation. High resin prices encourage customers to optimize column loading and extend reusable cycle life, which reduces annual replacement volume. In addition, differences in feedstream quality, capsid design and production platforms can limit the transferability of performance data between projects, slowing adoption of newly launched products.

## Opportunities

The strongest opportunities are emerging in affinity products for engineered capsids, broad platform resins, second-source qualification and localized GMP supply. As developers introduce novel capsids to improve tissue targeting, immune profiles and manufacturing yield, established binding ligands may lose affinity or require new process conditions. This creates demand for new ligand libraries, rapid resin screening services and product families that can move efficiently from development to commercial scale. Suppliers can also expand through integrated offerings combining loose resin, prepacked columns, process-development tools, ligand leakage assays, cleaning studies and regulatory support. China and other Asian markets offer additional

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opportunities as local gene therapy companies and CDMOs seek shorter lead times, lower procurement risk and alternatives to imported bioprocess materials.

### Challenges

The market continues to face limited standardization in product-performance reporting. Suppliers use different units for binding capacity, including viral particles, vector genomes and capsid measurements, while residence time, feed composition and breakthrough definitions also vary. This makes direct comparison difficult and increases the burden of customer-side testing. Manufacturers must maintain consistent ligand production, coupling density, bead morphology, impurity control and lot-to-lot performance while scaling relatively small annual volumes. Commercial success also depends on building credible GMP documentation, extractables and leachables data, ligand leakage methods, cleaning validation and long-term supply commitments. Rapid changes in capsid engineering and the emergence of alternative capture formats may shorten product lifecycles and require continuous technology investment.

## Industry Chain Analysis

The upstream segment of the AAV Affinity Chromatography Resins industry consists of agarose and synthetic polymer bead materials, functional monomers, cross-linking reagents, activation chemistries, spacer arms, affinity ligands and manufacturing-grade buffers. Ligand development is a particularly important source of differentiation because capsid selectivity, serotype coverage, elution behavior and alkaline stability depend strongly on ligand structure and immobilization chemistry. Matrix suppliers contribute particle-size control, pore architecture, mechanical strength and pressure-flow performance, while analytical materials and reference standards support binding, leakage and impurity testing.

The midstream segment integrates ligand discovery, matrix functionalization, coupling, washing, formulation, filling, quality control and batch release into a complete chromatography product. Value creation is concentrated in proprietary ligand technology, reproducible manufacturing, application data and regulatory support rather than in the base bead material alone. Downstream customers include gene therapy developers, biopharmaceutical companies, viral vector CDMOs, research institutions and manufacturing technology centers. These users evaluate products based on total process economics, including recovery, productivity, buffer consumption, resin lifetime,

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validation requirements and supply continuity. High small-pack prices support development-stage margins, while commercial contracts involve larger packaging discounts, technical service commitments and longer qualification cycles.

## Segment Insights

By serotype coverage, pan-serotype and limited multi-serotype AAV affinity resins are becoming strategically important because they allow developers and CDMOs to standardize purification across multiple pipeline assets. These products are particularly valuable during early development, when capsid selection may change and a common capture platform can reduce process-development time. Serotype-specific resins remain relevant where higher selectivity, stronger binding or more favorable elution performance can be achieved for important capsids such as AAV8 and AAV9. Products with insufficiently disclosed serotype validation remain a smaller and less differentiated part of the market.

Cross-linked agarose represents the most widely used matrix route among current commercial products because of its established bioprocess acceptance and favorable hydrophilic characteristics. Rigid polystyrene divinylbenzene, polymethacrylate and polyvinyl ether matrices provide alternative pressure-flow and mass-transfer performance for higher-throughput processing. Single-domain antibody ligands are the most frequently represented affinity route in the current product landscape, while synthetic peptides, recombinant proteins and engineered protein scaffolds provide differentiated options in stability, selectivity and manufacturing control. Loose bulk resin accounts for most manufacturing-stage consumption, whereas prepacked columns and small-volume formats play a larger role in screening, process development and technology transfer.

## Downstream Market Opportunities

Downstream opportunities are concentrated in process development, clinical manufacturing and commercial viral vector production. Development laboratories generate frequent but small-volume demand for serotype screening, capacity studies, cleaning evaluation and buffer optimization. Clinical-stage programs require larger quantities for engineering batches, GMP campaigns and process transfer, while late-stage and commercial projects create the highest resin demand per active program through validation, multiple production sites and planned replacement inventories. Both HEK293 and Sf9-based AAV manufacturing platforms require selective capture

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solutions, although differences in host-cell impurities, feed concentration and lysis conditions create distinct performance requirements. Suppliers that can demonstrate consistent results across production platforms and engineered capsids are positioned to access a broader downstream customer base.

## Regional Insights

North America is the largest market for AAV Affinity Chromatography Resins, supported by its concentration of gene therapy developers, clinical programs, commercial products, specialized CDMOs and established bioprocess suppliers. Demand is characterized by strong regulatory-documentation requirements, high adoption of platform processes and significant use of prepacked development and manufacturing columns. Europe remains an important market through its advanced gene therapy research base, regulated manufacturing infrastructure and expertise in ligand and chromatography technology. European customers place particular emphasis on process robustness, supply assurance and lifecycle documentation.

China is developing into the most important emerging supply and demand center. Domestic companies have introduced pan-serotype, multi-serotype and serotype-specific products, while local gene therapy developers increasingly assess domestic materials as primary or backup sources. The competitive advantage of Chinese suppliers is centered on local technical support, shorter lead times, flexible packaging and pricing, although broader commercial GMP references and long-term cycle data remain important qualification requirements. Japan, South Korea, India, China Taiwan and Southeast Asia currently function mainly as development, manufacturing-service, distribution or regional technical-support markets, with a limited number of independent commercial AAV affinity resin producers.

## Competitive Landscape Analysis

The competitive landscape is concentrated but gradually broadening. Established multinational suppliers benefit from installed customer processes, extensive application data, global distribution, regulatory support and demonstrated batch consistency. Their products are frequently embedded in clinical and commercial manufacturing processes, creating high switching costs and long customer retention. Specialized affinity technology companies compete through novel peptide ligands, engineered scaffolds, broad serotype coverage, mild elution and improved cleaning stability. Chinese

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manufacturers are expanding the market through locally developed ligands, agarose and polymer matrix capabilities, broader packaging flexibility and lower regional supply risk. However, competition is determined by more than nominal product price or binding capacity. Customers assess recovery, impurity clearance, capsid compatibility, pressure-flow behavior, reuse performance, ligand leakage, lot consistency and the supplier's ability to support regulatory filings. The market is therefore expected to remain technically selective, with successful suppliers requiring both proprietary product performance and credible long-term manufacturing support.

## Report Scope

This report is a detailed and comprehensive analysis for global AAV Affinity Chromatography Resins market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

## Key Features:

Global AAV Affinity Chromatography Resins market size and forecasts, in consumption value ($ Million), sales quantity (L), and average selling prices (US$/L), 2021-2032

Global AAV Affinity Chromatography Resins market size and forecasts by region and country, in consumption value ($ Million), sales quantity (L), and average selling prices (US$/L), 2021-2032

Global AAV Affinity Chromatography Resins market size and forecasts, by Type and by Application, in consumption value ($ Million), sales quantity (L), and average selling prices (US$/L), 2021-2032

Global AAV Affinity Chromatography Resins market shares of main players, shipments in revenue ($ Million), sales quantity (L), and ASP (US$/L), 2021-2026

## The Primary Objectives in This Report Are:

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To determine the size of the total market opportunity of global and key countries

To assess the growth potential for AAV Affinity Chromatography Resins

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global AAV Affinity Chromatography Resins market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Thermo Fisher Scientific Inc., Danaher Corporation, Repligen Corporation, Merck KGaA, ChromaGenix LLC, Shanghai Duoning Biotechnology Co., Ltd., Changzhou Smart-Lifesciences Biotechnology Co., Ltd., Shanghai Yaonuo Biotechnology Co., Ltd., Kangyuan Medical Technology Dalian Co., Ltd., Shangchun Biotechnology Wuhan Co., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

AAV Affinity Chromatography Resins market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

## Market Segmentation

### Market segment by Type

Pan-Serotype AAV Affinity Resins

Limited Multi-Serotype AAV Affinity Resins

Serotype-Specific AAV Affinity Resins

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Other

## Market segment by Matrix Material

Cross-Linked Agarose Resins

Cross-Linked Polystyrene Divinylbenzene Resins

Polymethacrylate Resins

Polyvinyl Ether Resins

Other

## Market segment by Application

HEK293-Derived AAV Purification

Sf9-Derived AAV Purification

Other

## Major players covered

Thermo Fisher Scientific Inc.

Danaher Corporation

Repligen Corporation

Merck KGaA

ChromaGenix LLC

Shanghai Duoning Biotechnology Co., Ltd.

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Changzhou Smart-Lifesciences Biotechnology Co., Ltd.

Shanghai Yaonuo Biotechnology Co., Ltd.

Kangyuan Medical Technology Dalian Co., Ltd.

Shangchun Biotechnology Wuhan Co., Ltd.

### Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

## Chapter Outline

Chapter 1, to describe AAV Affinity Chromatography Resins product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of AAV Affinity Chromatography Resins, with price, sales quantity, revenue, and global market share of AAV Affinity Chromatography Resins from 2021 to 2026.

Chapter 3, the AAV Affinity Chromatography Resins competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the AAV Affinity Chromatography Resins breakdown data are shown at the

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regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026.and AAV Affinity Chromatography Resins market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of AAV Affinity Chromatography Resins.

Chapter 14 and 15, to describe AAV Affinity Chromatography Resins sales channel, distributors, customers, research findings and conclusion.

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