

Global Viral Vector Purification Media Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/GC1F0E9CE84FEN.html>

Date: July 2026

Pages: 115

Price: US\$ 3,480.00 (Single User License)

ID: GC1F0E9CE84FEN

Abstracts

According to our (Global Info Research) latest study, the global Viral Vector Purification Media market size was valued at US\$ 121 million in 2025 and is forecast to a readjusted size of US\$ 391 million by 2032 with a CAGR of 17.6% during review period.

Virus vector purification media are chromatography and adsorption materials designed for the downstream purification of adeno-associated virus (AAV), lentivirus, adenovirus, retrovirus, oncolytic viruses, and virus-like particles (VLPs). Common formats include affinity resins, ion-exchange media, mixed-mode resins, core-shell flow-through media, monolithic columns, and membrane adsorbers. These products are used for viral particle capture, host cell protein and nucleic acid removal, empty/full capsid separation, pre-concentration polishing, and analytical characterization. Key purchasing criteria include serotype compatibility, dynamic binding capacity, recovery rate, empty/full capsid resolution, cleaning and regeneration durability, scalability consistency, and regulatory support documentation. The estimated gross margin is approximately 61%.

Demand for virus vector purification media is primarily driven by the progression of gene therapy and cell therapy programs from research into clinical and commercial manufacturing. In AAV production, affinity capture and empty/full capsid separation are among the most critical purification challenges. Lentiviral and adenoviral processes place greater emphasis on mild ion-exchange, membrane adsorption, and monolithic chromatography approaches that minimize shear stress and avoid exposure to harsh salt or low-pH conditions that may compromise vector activity.

The high-end market remains dominated by suppliers such as Cytiva, Thermo Fisher Scientific, Repligen, Sartorius, Bio-Rad, and Merck. Their competitive advantages stem

from proprietary ligand development, manufacturing consistency, regulatory documentation, and extensive process-scale application experience. Chinese suppliers have begun gaining traction in ion-exchange, mixed-mode, and core-shell media for viral vector and vaccine purification, but still face challenges in AAV-specific affinity ligands, long-term resin lifetime validation, and international regulatory acceptance.

Future market expansion will continue to be supported by growth in AAV pipelines, lentiviral cell therapies, oncolytic virus programs, and next-generation vaccine platforms. Near-term growth is driven not only by additional manufacturing capacity but also by process modernization, as chromatography-based workflows increasingly replace density-gradient ultracentrifugation. Affinity capture combined with ion-exchange polishing is becoming the preferred large-scale purification strategy. Although domestic substitution and multi-sourcing strategies may place downward pressure on pricing, specialized affinity resins and high-resolution empty/full capsid separation media are expected to maintain premium pricing and strong profitability due to their critical role in process performance and regulatory success.

This report is a detailed and comprehensive analysis for global Viral Vector Purification Media 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 Viral Vector Purification Media market size and forecasts, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global Viral Vector Purification Media market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global Viral Vector Purification Media market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global Viral Vector Purification Media market shares of main players, shipments in

revenue (\$ Million), sales quantity (kg), and ASP (US\$/kg), 2021-2026

The Primary Objectives in This Report Are:

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

To assess the growth potential for Viral Vector Purification Media

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 Viral Vector Purification Media 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 Cytiva, Thermo Fisher Scientific, Repligen, Sartorius, Bio-Rad, Merck, Tosoh Bioscience, Astrea Bioseparations, JNC, Sepax Technologies, etc.

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

Market Segmentation

Viral Vector Purification Media 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 segment by Type

AAV Affinity Media

Anion Exchange Media

Cation Exchange Media

Mixed-Mode Media

Core-Bead Flow-Through Media

Monolith and Membrane Adsorbers

Market segment by Vector Type

AAV Vector

Lentiviral Vector

Adenoviral Vector

Retroviral Vector

Oncolytic Virus

VLP and Vaccine Virus

Market segment by Process Step

Capture

Intermediate Purification

Empty/Full Capsid Separation

Polishing

Impurity Clearance

Analytical Separation

Market segment by Matrix Format

Agarose Bead

Polymer Bead

Cellulose Bead

Ceramic Media

Monolith

Membrane or Nanofiber Adsorber

Market segment by Application

AAV Gene Therapy Vector Production

Lentiviral Vector Production

Adenoviral Vector and Vaccine Production

Oncolytic Virus and VLP Production

Process Development and Scale-Up

QC and Analytical Sample Preparation

Major players covered

Cytiva

Thermo Fisher Scientific

Repligen

Sartorius

Bio-Rad

Merck

Tosoh Bioscience

Astrea Bioseparations

JNC

Sepax Technologies

Sunresin

Bestchrom

NanoMicro

BioToolomics

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)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Viral Vector Purification Media product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Viral Vector Purification Media,

with price, sales quantity, revenue, and global market share of Viral Vector Purification Media from 2021 to 2026.

Chapter 3, the Viral Vector Purification Media competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Viral Vector Purification Media breakdown data are shown at the 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 Viral Vector Purification Media 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 Viral Vector Purification Media.

Chapter 14 and 15, to describe Viral Vector Purification Media sales channel, distributors, customers, research findings and conclusion.

Contents

1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Market Analysis by Type

1.3.1 Overview: Global Viral Vector Purification Media Consumption Value by Type: 2021 Versus 2025 Versus 2032

1.3.2 AAV Affinity Media

1.3.3 Anion Exchange Media

1.3.4 Cation Exchange Media

1.3.5 Mixed-Mode Media

1.3.6 Core-Bead Flow-Through Media

1.3.7 Monolith and Membrane Adsorbers

1.4 Market Analysis by Vector Type

1.4.1 Overview: Global Viral Vector Purification Media Consumption Value by Vector Type: 2021 Versus 2025 Versus 2032

1.4.2 AAV Vector

1.4.3 Lentiviral Vector

1.4.4 Adenoviral Vector

1.4.5 Retroviral Vector

1.4.6 Oncolytic Virus

1.4.7 VLP and Vaccine Virus

1.5 Market Analysis by Process Step

1.5.1 Overview: Global Viral Vector Purification Media Consumption Value by Process Step: 2021 Versus 2025 Versus 2032

1.5.2 Capture

1.5.3 Intermediate Purification

1.5.4 Empty/Full Capsid Separation

1.5.5 Polishing

1.5.6 Impurity Clearance

1.5.7 Analytical Separation

1.6 Market Analysis by Matrix Format

1.6.1 Overview: Global Viral Vector Purification Media Consumption Value by Matrix Format: 2021 Versus 2025 Versus 2032

1.6.2 Agarose Bead

1.6.3 Polymer Bead

1.6.4 Cellulose Bead

- 1.6.5 Ceramic Media
- 1.6.6 Monolith
- 1.6.7 Membrane or Nanofiber Adsorber
- 1.7 Market Analysis by Application
 - 1.7.1 Overview: Global Viral Vector Purification Media Consumption Value by Application: 2021 Versus 2025 Versus 2032
 - 1.7.2 AAV Gene Therapy Vector Production
 - 1.7.3 Lentiviral Vector Production
 - 1.7.4 Adenoviral Vector and Vaccine Production
 - 1.7.5 Oncolytic Virus and VLP Production
 - 1.7.6 Process Development and Scale-Up
 - 1.7.7 QC and Analytical Sample Preparation
- 1.8 Global Viral Vector Purification Media Market Size & Forecast
 - 1.8.1 Global Viral Vector Purification Media Consumption Value (2021 & 2025 & 2032)
 - 1.8.2 Global Viral Vector Purification Media Sales Quantity (2021-2032)
 - 1.8.3 Global Viral Vector Purification Media Average Price (2021-2032)

2 MANUFACTURERS PROFILES

- 2.1 Cytiva
 - 2.1.1 Cytiva Details
 - 2.1.2 Cytiva Major Business
 - 2.1.3 Cytiva Viral Vector Purification Media Product and Services
 - 2.1.4 Cytiva Viral Vector Purification Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.1.5 Cytiva Recent Developments/Updates
- 2.2 Thermo Fisher Scientific
 - 2.2.1 Thermo Fisher Scientific Details
 - 2.2.2 Thermo Fisher Scientific Major Business
 - 2.2.3 Thermo Fisher Scientific Viral Vector Purification Media Product and Services
 - 2.2.4 Thermo Fisher Scientific Viral Vector Purification Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.2.5 Thermo Fisher Scientific Recent Developments/Updates
- 2.3 Repligen
 - 2.3.1 Repligen Details
 - 2.3.2 Repligen Major Business
 - 2.3.3 Repligen Viral Vector Purification Media Product and Services
 - 2.3.4 Repligen Viral Vector Purification Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

- 2.3.5 Repligen Recent Developments/Updates
- 2.4 Sartorius
 - 2.4.1 Sartorius Details
 - 2.4.2 Sartorius Major Business
 - 2.4.3 Sartorius Viral Vector Purification Media Product and Services
 - 2.4.4 Sartorius Viral Vector Purification Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.4.5 Sartorius Recent Developments/Updates
- 2.5 Bio-Rad
 - 2.5.1 Bio-Rad Details
 - 2.5.2 Bio-Rad Major Business
 - 2.5.3 Bio-Rad Viral Vector Purification Media Product and Services
 - 2.5.4 Bio-Rad Viral Vector Purification Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.5.5 Bio-Rad Recent Developments/Updates
- 2.6 Merck
 - 2.6.1 Merck Details
 - 2.6.2 Merck Major Business
 - 2.6.3 Merck Viral Vector Purification Media Product and Services
 - 2.6.4 Merck Viral Vector Purification Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.6.5 Merck Recent Developments/Updates
- 2.7 Tosoh Bioscience
 - 2.7.1 Tosoh Bioscience Details
 - 2.7.2 Tosoh Bioscience Major Business
 - 2.7.3 Tosoh Bioscience Viral Vector Purification Media Product and Services
 - 2.7.4 Tosoh Bioscience Viral Vector Purification Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.7.5 Tosoh Bioscience Recent Developments/Updates
- 2.8 Astrea Bioseparations
 - 2.8.1 Astrea Bioseparations Details
 - 2.8.2 Astrea Bioseparations Major Business
 - 2.8.3 Astrea Bioseparations Viral Vector Purification Media Product and Services
 - 2.8.4 Astrea Bioseparations Viral Vector Purification Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.8.5 Astrea Bioseparations Recent Developments/Updates
- 2.9 JNC
 - 2.9.1 JNC Details
 - 2.9.2 JNC Major Business

- 2.9.3 JNC Viral Vector Purification Media Product and Services
- 2.9.4 JNC Viral Vector Purification Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.9.5 JNC Recent Developments/Updates
- 2.10 Sepax Technologies
 - 2.10.1 Sepax Technologies Details
 - 2.10.2 Sepax Technologies Major Business
 - 2.10.3 Sepax Technologies Viral Vector Purification Media Product and Services
 - 2.10.4 Sepax Technologies Viral Vector Purification Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.10.5 Sepax Technologies Recent Developments/Updates
- 2.11 Sunresin
 - 2.11.1 Sunresin Details
 - 2.11.2 Sunresin Major Business
 - 2.11.3 Sunresin Viral Vector Purification Media Product and Services
 - 2.11.4 Sunresin Viral Vector Purification Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.11.5 Sunresin Recent Developments/Updates
- 2.12 Bestchrom
 - 2.12.1 Bestchrom Details
 - 2.12.2 Bestchrom Major Business
 - 2.12.3 Bestchrom Viral Vector Purification Media Product and Services
 - 2.12.4 Bestchrom Viral Vector Purification Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.12.5 Bestchrom Recent Developments/Updates
- 2.13 NanoMicro
 - 2.13.1 NanoMicro Details
 - 2.13.2 NanoMicro Major Business
 - 2.13.3 NanoMicro Viral Vector Purification Media Product and Services
 - 2.13.4 NanoMicro Viral Vector Purification Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.13.5 NanoMicro Recent Developments/Updates
- 2.14 BioToolomics
 - 2.14.1 BioToolomics Details
 - 2.14.2 BioToolomics Major Business
 - 2.14.3 BioToolomics Viral Vector Purification Media Product and Services
 - 2.14.4 BioToolomics Viral Vector Purification Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.14.5 BioToolomics Recent Developments/Updates

3 COMPETITIVE ENVIRONMENT: VIRAL VECTOR PURIFICATION MEDIA BY MANUFACTURER

- 3.1 Global Viral Vector Purification Media Sales Quantity by Manufacturer (2021-2026)
- 3.2 Global Viral Vector Purification Media Revenue by Manufacturer (2021-2026)
- 3.3 Global Viral Vector Purification Media Average Price by Manufacturer (2021-2026)
- 3.4 Market Share Analysis (2025)
 - 3.4.1 Producer Shipments of Viral Vector Purification Media by Manufacturer Revenue (\$MM) and Market Share (%): 2025
 - 3.4.2 Top 3 Viral Vector Purification Media Manufacturer Market Share in 2025
 - 3.4.3 Top 6 Viral Vector Purification Media Manufacturer Market Share in 2025
- 3.5 Viral Vector Purification Media Market: Overall Company Footprint Analysis
 - 3.5.1 Viral Vector Purification Media Market: Region Footprint
 - 3.5.2 Viral Vector Purification Media Market: Company Product Type Footprint
 - 3.5.3 Viral Vector Purification Media Market: Company Product Application Footprint
- 3.6 New Market Entrants and Barriers to Market Entry
- 3.7 Mergers, Acquisition, Agreements, and Collaborations

4 CONSUMPTION ANALYSIS BY REGION

- 4.1 Global Viral Vector Purification Media Market Size by Region
 - 4.1.1 Global Viral Vector Purification Media Sales Quantity by Region (2021-2032)
 - 4.1.2 Global Viral Vector Purification Media Consumption Value by Region (2021-2032)
 - 4.1.3 Global Viral Vector Purification Media Average Price by Region (2021-2032)
- 4.2 North America Viral Vector Purification Media Consumption Value (2021-2032)
- 4.3 Europe Viral Vector Purification Media Consumption Value (2021-2032)
- 4.4 Asia-Pacific Viral Vector Purification Media Consumption Value (2021-2032)
- 4.5 South America Viral Vector Purification Media Consumption Value (2021-2032)
- 4.6 Middle East & Africa Viral Vector Purification Media Consumption Value (2021-2032)

5 MARKET SEGMENT BY TYPE

- 5.1 Global Viral Vector Purification Media Sales Quantity by Type (2021-2032)
- 5.2 Global Viral Vector Purification Media Consumption Value by Type (2021-2032)
- 5.3 Global Viral Vector Purification Media Average Price by Type (2021-2032)

6 MARKET SEGMENT BY APPLICATION

6.1 Global Viral Vector Purification Media Sales Quantity by Application (2021-2032)

6.2 Global Viral Vector Purification Media Consumption Value by Application (2021-2032)

6.3 Global Viral Vector Purification Media Average Price by Application (2021-2032)

7 NORTH AMERICA

7.1 North America Viral Vector Purification Media Sales Quantity by Type (2021-2032)

7.2 North America Viral Vector Purification Media Sales Quantity by Application (2021-2032)

7.3 North America Viral Vector Purification Media Market Size by Country

7.3.1 North America Viral Vector Purification Media Sales Quantity by Country (2021-2032)

7.3.2 North America Viral Vector Purification Media Consumption Value by Country (2021-2032)

7.3.3 United States Market Size and Forecast (2021-2032)

7.3.4 Canada Market Size and Forecast (2021-2032)

7.3.5 Mexico Market Size and Forecast (2021-2032)

8 EUROPE

8.1 Europe Viral Vector Purification Media Sales Quantity by Type (2021-2032)

8.2 Europe Viral Vector Purification Media Sales Quantity by Application (2021-2032)

8.3 Europe Viral Vector Purification Media Market Size by Country

8.3.1 Europe Viral Vector Purification Media Sales Quantity by Country (2021-2032)

8.3.2 Europe Viral Vector Purification Media Consumption Value by Country (2021-2032)

8.3.3 Germany Market Size and Forecast (2021-2032)

8.3.4 France Market Size and Forecast (2021-2032)

8.3.5 United Kingdom Market Size and Forecast (2021-2032)

8.3.6 Russia Market Size and Forecast (2021-2032)

8.3.7 Italy Market Size and Forecast (2021-2032)

9 ASIA-PACIFIC

9.1 Asia-Pacific Viral Vector Purification Media Sales Quantity by Type (2021-2032)

9.2 Asia-Pacific Viral Vector Purification Media Sales Quantity by Application

(2021-2032)

9.3 Asia-Pacific Viral Vector Purification Media Market Size by Region

9.3.1 Asia-Pacific Viral Vector Purification Media Sales Quantity by Region

(2021-2032)

9.3.2 Asia-Pacific Viral Vector Purification Media Consumption Value by Region

(2021-2032)

9.3.3 China Market Size and Forecast (2021-2032)

9.3.4 Japan Market Size and Forecast (2021-2032)

9.3.5 South Korea Market Size and Forecast (2021-2032)

9.3.6 India Market Size and Forecast (2021-2032)

9.3.7 Southeast Asia Market Size and Forecast (2021-2032)

9.3.8 Australia Market Size and Forecast (2021-2032)

10 SOUTH AMERICA

10.1 South America Viral Vector Purification Media Sales Quantity by Type (2021-2032)

10.2 South America Viral Vector Purification Media Sales Quantity by Application (2021-2032)

10.3 South America Viral Vector Purification Media Market Size by Country

10.3.1 South America Viral Vector Purification Media Sales Quantity by Country

(2021-2032)

10.3.2 South America Viral Vector Purification Media Consumption Value by Country

(2021-2032)

10.3.3 Brazil Market Size and Forecast (2021-2032)

10.3.4 Argentina Market Size and Forecast (2021-2032)

11 MIDDLE EAST & AFRICA

11.1 Middle East & Africa Viral Vector Purification Media Sales Quantity by Type (2021-2032)

11.2 Middle East & Africa Viral Vector Purification Media Sales Quantity by Application (2021-2032)

11.3 Middle East & Africa Viral Vector Purification Media Market Size by Country

11.3.1 Middle East & Africa Viral Vector Purification Media Sales Quantity by Country

(2021-2032)

11.3.2 Middle East & Africa Viral Vector Purification Media Consumption Value by Country (2021-2032)

11.3.3 Turkey Market Size and Forecast (2021-2032)

11.3.4 Egypt Market Size and Forecast (2021-2032)

11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)

11.3.6 South Africa Market Size and Forecast (2021-2032)

12 MARKET DYNAMICS

12.1 Viral Vector Purification Media Market Drivers

12.2 Viral Vector Purification Media Market Restraints

12.3 Viral Vector Purification Media Trends Analysis

12.4 Porters Five Forces Analysis

12.4.1 Threat of New Entrants

12.4.2 Bargaining Power of Suppliers

12.4.3 Bargaining Power of Buyers

12.4.4 Threat of Substitutes

12.4.5 Competitive Rivalry

13 RAW MATERIAL AND INDUSTRY CHAIN

13.1 Raw Material of Viral Vector Purification Media and Key Manufacturers

13.2 Manufacturing Costs Percentage of Viral Vector Purification Media

13.3 Viral Vector Purification Media Production Process

13.4 Industry Value Chain Analysis

14 SHIPMENTS BY DISTRIBUTION CHANNEL

14.1 Sales Channel

14.1.1 Direct to End-User

14.1.2 Distributors

14.2 Viral Vector Purification Media Typical Distributors

14.3 Viral Vector Purification Media Typical Customers

15 RESEARCH FINDINGS AND CONCLUSION

16 APPENDIX

16.1 Methodology

16.2 Research Process and Data Source

16.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. Global Viral Vector Purification Media Consumption Value by Type, (USD Million), 2021 & 2025 & 2032

Table 2. Global Viral Vector Purification Media Consumption Value by Vector Type, (USD Million), 2021 & 2025 & 2032

Table 3. Global Viral Vector Purification Media Consumption Value by Process Step, (USD Million), 2021 & 2025 & 2032

Table 4. Global Viral Vector Purification Media Consumption Value by Matrix Format, (USD Million), 2021 & 2025 & 2032

Table 5. Global Viral Vector Purification Media Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Table 6. Cytiva Basic Information, Manufacturing Base and Competitors

Table 7. Cytiva Major Business

Table 8. Cytiva Viral Vector Purification Media Product and Services

Table 9. Cytiva Viral Vector Purification Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 10. Cytiva Recent Developments/Updates

Table 11. Thermo Fisher Scientific Basic Information, Manufacturing Base and Competitors

Table 12. Thermo Fisher Scientific Major Business

Table 13. Thermo Fisher Scientific Viral Vector Purification Media Product and Services

Table 14. Thermo Fisher Scientific Viral Vector Purification Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 15. Thermo Fisher Scientific Recent Developments/Updates

Table 16. Repligen Basic Information, Manufacturing Base and Competitors

Table 17. Repligen Major Business

Table 18. Repligen Viral Vector Purification Media Product and Services

Table 19. Repligen Viral Vector Purification Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 20. Repligen Recent Developments/Updates

Table 21. Sartorius Basic Information, Manufacturing Base and Competitors

Table 22. Sartorius Major Business

Table 23. Sartorius Viral Vector Purification Media Product and Services

Table 24. Sartorius Viral Vector Purification Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 25. Sartorius Recent Developments/Updates
Table 26. Bio-Rad Basic Information, Manufacturing Base and Competitors
Table 27. Bio-Rad Major Business
Table 28. Bio-Rad Viral Vector Purification Media Product and Services
Table 29. Bio-Rad Viral Vector Purification Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 30. Bio-Rad Recent Developments/Updates
Table 31. Merck Basic Information, Manufacturing Base and Competitors
Table 32. Merck Major Business
Table 33. Merck Viral Vector Purification Media Product and Services
Table 34. Merck Viral Vector Purification Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 35. Merck Recent Developments/Updates
Table 36. Tosoh Bioscience Basic Information, Manufacturing Base and Competitors
Table 37. Tosoh Bioscience Major Business
Table 38. Tosoh Bioscience Viral Vector Purification Media Product and Services
Table 39. Tosoh Bioscience Viral Vector Purification Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 40. Tosoh Bioscience Recent Developments/Updates
Table 41. Astrea Bioseparations Basic Information, Manufacturing Base and Competitors
Table 42. Astrea Bioseparations Major Business
Table 43. Astrea Bioseparations Viral Vector Purification Media Product and Services
Table 44. Astrea Bioseparations Viral Vector Purification Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 45. Astrea Bioseparations Recent Developments/Updates
Table 46. JNC Basic Information, Manufacturing Base and Competitors
Table 47. JNC Major Business
Table 48. JNC Viral Vector Purification Media Product and Services
Table 49. JNC Viral Vector Purification Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 50. JNC Recent Developments/Updates
Table 51. Sepax Technologies Basic Information, Manufacturing Base and Competitors
Table 52. Sepax Technologies Major Business
Table 53. Sepax Technologies Viral Vector Purification Media Product and Services
Table 54. Sepax Technologies Viral Vector Purification Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share

(2021-2026)

Table 55. Sepax Technologies Recent Developments/Updates

Table 56. Sunresin Basic Information, Manufacturing Base and Competitors

Table 57. Sunresin Major Business

Table 58. Sunresin Viral Vector Purification Media Product and Services

Table 59. Sunresin Viral Vector Purification Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 60. Sunresin Recent Developments/Updates

Table 61. Bestchrom Basic Information, Manufacturing Base and Competitors

Table 62. Bestchrom Major Business

Table 63. Bestchrom Viral Vector Purification Media Product and Services

Table 64. Bestchrom Viral Vector Purification Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 65. Bestchrom Recent Developments/Updates

Table 66. NanoMicro Basic Information, Manufacturing Base and Competitors

Table 67. NanoMicro Major Business

Table 68. NanoMicro Viral Vector Purification Media Product and Services

Table 69. NanoMicro Viral Vector Purification Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 70. NanoMicro Recent Developments/Updates

Table 71. BioToolomics Basic Information, Manufacturing Base and Competitors

Table 72. BioToolomics Major Business

Table 73. BioToolomics Viral Vector Purification Media Product and Services

Table 74. BioToolomics Viral Vector Purification Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 75. BioToolomics Recent Developments/Updates

Table 76. Global Viral Vector Purification Media Sales Quantity by Manufacturer (2021-2026) & (kg)

Table 77. Global Viral Vector Purification Media Revenue by Manufacturer (2021-2026) & (USD Million)

Table 78. Global Viral Vector Purification Media Average Price by Manufacturer (2021-2026) & (US\$/kg)

Table 79. Market Position of Manufacturers in Viral Vector Purification Media, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025

Table 80. Head Office and Viral Vector Purification Media Production Site of Key Manufacturer

Table 81. Viral Vector Purification Media Market: Company Product Type Footprint

Table 82. Viral Vector Purification Media Market: Company Product Application Footprint

Table 83. Viral Vector Purification Media New Market Entrants and Barriers to Market Entry

Table 84. Viral Vector Purification Media Mergers, Acquisition, Agreements, and Collaborations

Table 85. Global Viral Vector Purification Media Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR

Table 86. Global Viral Vector Purification Media Sales Quantity by Region (2021-2026) & (kg)

Table 87. Global Viral Vector Purification Media Sales Quantity by Region (2027-2032) & (kg)

Table 88. Global Viral Vector Purification Media Consumption Value by Region (2021-2026) & (USD Million)

Table 89. Global Viral Vector Purification Media Consumption Value by Region (2027-2032) & (USD Million)

Table 90. Global Viral Vector Purification Media Average Price by Region (2021-2026) & (US\$/kg)

Table 91. Global Viral Vector Purification Media Average Price by Region (2027-2032) & (US\$/kg)

Table 92. Global Viral Vector Purification Media Sales Quantity by Type (2021-2026) & (kg)

Table 93. Global Viral Vector Purification Media Sales Quantity by Type (2027-2032) & (kg)

Table 94. Global Viral Vector Purification Media Consumption Value by Type (2021-2026) & (USD Million)

Table 95. Global Viral Vector Purification Media Consumption Value by Type (2027-2032) & (USD Million)

Table 96. Global Viral Vector Purification Media Average Price by Type (2021-2026) & (US\$/kg)

Table 97. Global Viral Vector Purification Media Average Price by Type (2027-2032) & (US\$/kg)

Table 98. Global Viral Vector Purification Media Sales Quantity by Application (2021-2026) & (kg)

Table 99. Global Viral Vector Purification Media Sales Quantity by Application (2027-2032) & (kg)

Table 100. Global Viral Vector Purification Media Consumption Value by Application (2021-2026) & (USD Million)

Table 101. Global Viral Vector Purification Media Consumption Value by Application (2027-2032) & (USD Million)

Table 102. Global Viral Vector Purification Media Average Price by Application

(2021-2026) & (US\$/kg)

Table 103. Global Viral Vector Purification Media Average Price by Application

(2027-2032) & (US\$/kg)

Table 104. North America Viral Vector Purification Media Sales Quantity by Type

(2021-2026) & (kg)

Table 105. North America Viral Vector Purification Media Sales Quantity by Type

(2027-2032) & (kg)

Table 106. North America Viral Vector Purification Media Sales Quantity by Application

(2021-2026) & (kg)

Table 107. North America Viral Vector Purification Media Sales Quantity by Application

(2027-2032) & (kg)

Table 108. North America Viral Vector Purification Media Sales Quantity by Country

(2021-2026) & (kg)

Table 109. North America Viral Vector Purification Media Sales Quantity by Country

(2027-2032) & (kg)

Table 110. North America Viral Vector Purification Media Consumption Value by Country (2021-2026) & (USD Million)

Table 111. North America Viral Vector Purification Media Consumption Value by Country (2027-2032) & (USD Million)

Table 112. Europe Viral Vector Purification Media Sales Quantity by Type (2021-2026) & (kg)

Table 113. Europe Viral Vector Purification Media Sales Quantity by Type (2027-2032) & (kg)

Table 114. Europe Viral Vector Purification Media Sales Quantity by Application (2021-2026) & (kg)

Table 115. Europe Viral Vector Purification Media Sales Quantity by Application (2027-2032) & (kg)

Table 116. Europe Viral Vector Purification Media Sales Quantity by Country (2021-2026) & (kg)

Table 117. Europe Viral Vector Purification Media Sales Quantity by Country (2027-2032) & (kg)

Table 118. Europe Viral Vector Purification Media Consumption Value by Country (2021-2026) & (USD Million)

Table 119. Europe Viral Vector Purification Media Consumption Value by Country (2027-2032) & (USD Million)

Table 120. Asia-Pacific Viral Vector Purification Media Sales Quantity by Type (2021-2026) & (kg)

Table 121. Asia-Pacific Viral Vector Purification Media Sales Quantity by Type (2027-2032) & (kg)

Table 122. Asia-Pacific Viral Vector Purification Media Sales Quantity by Application (2021-2026) & (kg)

Table 123. Asia-Pacific Viral Vector Purification Media Sales Quantity by Application (2027-2032) & (kg)

Table 124. Asia-Pacific Viral Vector Purification Media Sales Quantity by Region (2021-2026) & (kg)

Table 125. Asia-Pacific Viral Vector Purification Media Sales Quantity by Region (2027-2032) & (kg)

Table 126. Asia-Pacific Viral Vector Purification Media Consumption Value by Region (2021-2026) & (USD Million)

Table 127. Asia-Pacific Viral Vector Purification Media Consumption Value by Region (2027-2032) & (USD Million)

Table 128. South America Viral Vector Purification Media Sales Quantity by Type (2021-2026) & (kg)

Table 129. South America Viral Vector Purification Media Sales Quantity by Type (2027-2032) & (kg)

Table 130. South America Viral Vector Purification Media Sales Quantity by Application (2021-2026) & (kg)

Table 131. South America Viral Vector Purification Media Sales Quantity by Application (2027-2032) & (kg)

Table 132. South America Viral Vector Purification Media Sales Quantity by Country (2021-2026) & (kg)

Table 133. South America Viral Vector Purification Media Sales Quantity by Country (2027-2032) & (kg)

Table 134. South America Viral Vector Purification Media Consumption Value by Country (2021-2026) & (USD Million)

Table 135. South America Viral Vector Purification Media Consumption Value by Country (2027-2032) & (USD Million)

Table 136. Middle East & Africa Viral Vector Purification Media Sales Quantity by Type (2021-2026) & (kg)

Table 137. Middle East & Africa Viral Vector Purification Media Sales Quantity by Type (2027-2032) & (kg)

Table 138. Middle East & Africa Viral Vector Purification Media Sales Quantity by Application (2021-2026) & (kg)

Table 139. Middle East & Africa Viral Vector Purification Media Sales Quantity by Application (2027-2032) & (kg)

Table 140. Middle East & Africa Viral Vector Purification Media Sales Quantity by Country (2021-2026) & (kg)

Table 141. Middle East & Africa Viral Vector Purification Media Sales Quantity by

Country (2027-2032) & (kg)

Table 142. Middle East & Africa Viral Vector Purification Media Consumption Value by Country (2021-2026) & (USD Million)

Table 143. Middle East & Africa Viral Vector Purification Media Consumption Value by Country (2027-2032) & (USD Million)

Table 144. Viral Vector Purification Media Raw Material

Table 145. Key Manufacturers of Viral Vector Purification Media Raw Materials

Table 146. Viral Vector Purification Media Typical Distributors

Table 147. Viral Vector Purification Media Typical Customers

List Of Figures

LIST OF FIGURES

Figure 1. Viral Vector Purification Media Picture

Figure 2. Global Viral Vector Purification Media Revenue by Type, (USD Million), 2021 & 2025 & 2032

Figure 3. Global Viral Vector Purification Media Revenue Market Share by Type in 2025

Figure 4. AAV Affinity Media Examples

Figure 5. Anion Exchange Media Examples

Figure 6. Cation Exchange Media Examples

Figure 7. Mixed-Mode Media Examples

Figure 8. Core-Bead Flow-Through Media Examples

Figure 9. Monolith and Membrane Adsorbers Examples

Figure 10. Global Viral Vector Purification Media Revenue by Vector Type, (USD Million), 2021 & 2025 & 2032

Figure 11. Global Viral Vector Purification Media Revenue Market Share by Vector Type in 2025

Figure 12. AAV Vector Examples

Figure 13. Lentiviral Vector Examples

Figure 14. Adenoviral Vector Examples

Figure 15. Retroviral Vector Examples

Figure 16. Oncolytic Virus Examples

Figure 17. VLP and Vaccine Virus Examples

Figure 18. Global Viral Vector Purification Media Revenue by Process Step, (USD Million), 2021 & 2025 & 2032

Figure 19. Global Viral Vector Purification Media Revenue Market Share by Process Step in 2025

Figure 20. Capture Examples

Figure 21. Intermediate Purification Examples

Figure 22. Empty/Full Capsid Separation Examples

Figure 23. Polishing Examples

Figure 24. Impurity Clearance Examples

Figure 25. Analytical Separation Examples

Figure 26. Global Viral Vector Purification Media Revenue by Matrix Format, (USD Million), 2021 & 2025 & 2032

Figure 27. Global Viral Vector Purification Media Revenue Market Share by Matrix Format in 2025

Figure 28. Agarose Bead Examples

Figure 29. Polymer Bead Examples

Figure 30. Cellulose Bead Examples

Figure 31. Ceramic Media Examples

Figure 32. Monolith Examples

Figure 33. Membrane or Nanofiber Adsorber Examples

Figure 34. Global Viral Vector Purification Media Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 35. Global Viral Vector Purification Media Revenue Market Share by Application in 2025

Figure 36. AAV Gene Therapy Vector Production Examples

Figure 37. Lentiviral Vector Production Examples

Figure 38. Adenoviral Vector and Vaccine Production Examples

Figure 39. Oncolytic Virus and VLP Production Examples

Figure 40. Process Development and Scale-Up Examples

Figure 41. QC and Analytical Sample Preparation Examples

Figure 42. Global Viral Vector Purification Media Consumption Value, (USD Million): 2021 & 2025 & 2032

Figure 43. Global Viral Vector Purification Media Consumption Value and Forecast (2021-2032) & (USD Million)

Figure 44. Global Viral Vector Purification Media Sales Quantity (2021-2032) & (kg)

Figure 45. Global Viral Vector Purification Media Price (2021-2032) & (US\$/kg)

Figure 46. Global Viral Vector Purification Media Sales Quantity Market Share by Manufacturer in 2025

Figure 47. Global Viral Vector Purification Media Revenue Market Share by Manufacturer in 2025

Figure 48. Producer Shipments of Viral Vector Purification Media by Manufacturer Sales (\$MM) and Market Share (%): 2025

Figure 49. Top 3 Viral Vector Purification Media Manufacturer (Revenue) Market Share in 2025

Figure 50. Top 6 Viral Vector Purification Media Manufacturer (Revenue) Market Share in 2025

Figure 51. Global Viral Vector Purification Media Sales Quantity Market Share by Region (2021-2032)

Figure 52. Global Viral Vector Purification Media Consumption Value Market Share by Region (2021-2032)

Figure 53. North America Viral Vector Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 54. Europe Viral Vector Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 55. Asia-Pacific Viral Vector Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 56. South America Viral Vector Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 57. Middle East & Africa Viral Vector Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 58. Global Viral Vector Purification Media Sales Quantity Market Share by Type (2021-2032)

Figure 59. Global Viral Vector Purification Media Consumption Value Market Share by Type (2021-2032)

Figure 60. Global Viral Vector Purification Media Average Price by Type (2021-2032) & (US\$/kg)

Figure 61. Global Viral Vector Purification Media Sales Quantity Market Share by Application (2021-2032)

Figure 62. Global Viral Vector Purification Media Revenue Market Share by Application (2021-2032)

Figure 63. Global Viral Vector Purification Media Average Price by Application (2021-2032) & (US\$/kg)

Figure 64. North America Viral Vector Purification Media Sales Quantity Market Share by Type (2021-2032)

Figure 65. North America Viral Vector Purification Media Sales Quantity Market Share by Application (2021-2032)

Figure 66. North America Viral Vector Purification Media Sales Quantity Market Share by Country (2021-2032)

Figure 67. North America Viral Vector Purification Media Consumption Value Market Share by Country (2021-2032)

Figure 68. United States Viral Vector Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 69. Canada Viral Vector Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 70. Mexico Viral Vector Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 71. Europe Viral Vector Purification Media Sales Quantity Market Share by Type (2021-2032)

Figure 72. Europe Viral Vector Purification Media Sales Quantity Market Share by Application (2021-2032)

Figure 73. Europe Viral Vector Purification Media Sales Quantity Market Share by Country (2021-2032)

Figure 74. Europe Viral Vector Purification Media Consumption Value Market Share by

Country (2021-2032)

Figure 75. Germany Viral Vector Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 76. France Viral Vector Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 77. United Kingdom Viral Vector Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 78. Russia Viral Vector Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 79. Italy Viral Vector Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 80. Asia-Pacific Viral Vector Purification Media Sales Quantity Market Share by Type (2021-2032)

Figure 81. Asia-Pacific Viral Vector Purification Media Sales Quantity Market Share by Application (2021-2032)

Figure 82. Asia-Pacific Viral Vector Purification Media Sales Quantity Market Share by Region (2021-2032)

Figure 83. Asia-Pacific Viral Vector Purification Media Consumption Value Market Share by Region (2021-2032)

Figure 84. China Viral Vector Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 85. Japan Viral Vector Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 86. South Korea Viral Vector Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 87. India Viral Vector Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 88. Southeast Asia Viral Vector Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 89. Australia Viral Vector Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 90. South America Viral Vector Purification Media Sales Quantity Market Share by Type (2021-2032)

Figure 91. South America Viral Vector Purification Media Sales Quantity Market Share by Application (2021-2032)

Figure 92. South America Viral Vector Purification Media Sales Quantity Market Share by Country (2021-2032)

Figure 93. South America Viral Vector Purification Media Consumption Value Market Share by Country (2021-2032)

Figure 94. Brazil Viral Vector Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 95. Argentina Viral Vector Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 96. Middle East & Africa Viral Vector Purification Media Sales Quantity Market Share by Type (2021-2032)

Figure 97. Middle East & Africa Viral Vector Purification Media Sales Quantity Market Share by Application (2021-2032)

Figure 98. Middle East & Africa Viral Vector Purification Media Sales Quantity Market Share by Country (2021-2032)

Figure 99. Middle East & Africa Viral Vector Purification Media Consumption Value Market Share by Country (2021-2032)

Figure 100. Turkey Viral Vector Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 101. Egypt Viral Vector Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 102. Saudi Arabia Viral Vector Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 103. South Africa Viral Vector Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 104. Viral Vector Purification Media Market Drivers

Figure 105. Viral Vector Purification Media Market Restraints

Figure 106. Viral Vector Purification Media Market Trends

Figure 107. Porters Five Forces Analysis

Figure 108. Manufacturing Cost Structure Analysis of Viral Vector Purification Media in 2025

Figure 109. Manufacturing Process Analysis of Viral Vector Purification Media

Figure 110. Viral Vector Purification Media Industrial Chain

Figure 111. Sales Channel: Direct to End-User vs Distributors

Figure 112. Direct Channel Pros & Cons

Figure 113. Indirect Channel Pros & Cons

Figure 114. Methodology

Figure 115. Research Process and Data Source

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