

Personalized Cancer Vaccine Market Size, Share & Trends Analysis Report By Type (Dendritic Cell, RNA-based (mRNA), Neoantigen-based), By Technology (Cell-based, mRNA PCV), By Distribution Channel, By Region, And Segment Forecasts, 2025 - 2030

<https://marketpublishers.com/r/P7F496CEE2BFEN.html>

Date: May 2025

Pages: 195

Price: US\$ 5,950.00 (Single User License)

ID: P7F496CEE2BFEN

Abstracts

This report can be delivered to the clients within 3 Business Days

Personalized Cancer Vaccine Market Growth & Trends

The global personalized cancer vaccine market size is expected to reach USD 1.45 billion by 2030, registering a CAGR of 44.86% from 2025 to 2030, according to a new report by Grand View Research, Inc. The convergence of immunotherapy, genomics, and mRNA technologies drives the market growth. Unlike traditional vaccines, these personalized therapies are tailored to each patient's unique tumor profile, targeting neoantigens that arise from specific genetic mutations. This precision has opened new therapeutic horizons in oncology, especially for hard-to-treat cancers. The market growth is propelled by increasing investments in biotechnology, growing incidence of cancer worldwide, and advancements in next-generation sequencing. The rapid progression from clinical trials to regulatory designations, such as the European Medicines Agency's PRIME designation for Moderna and Merck's mRNA-4157/V940 in April 2023, is emblematic of this momentum. These vaccines are no longer speculative treatments; they are becoming integral to the future oncology landscape.

One of the most pivotal drivers of market growth is innovation in mRNA-based vaccine platforms. The success of COVID-19 mRNA vaccines accelerated public and private sector confidence in the modality, leading to increased funding and faster regulatory pathways. Moderna's investigational vaccine, mRNA-4157/V940, developed in

partnership with Merck, exemplifies this progress. Granted PRIME designation by the EMA in April 2023, the vaccine showed promising results in Phase 2b trials (KEYNOTE-942), especially when paired with Merck's immunotherapy drug KEYTRUDA. Similarly, BioNTech, a pioneer in mRNA technology, showcased its oncology pipeline at the AACR Annual Meeting in April 2024, highlighting its mRNA-based cancer vaccines and antibody-drug conjugates. These innovations are allowing researchers to rapidly generate vaccine candidates based on tumor sequencing, personalize therapies in near real-time, and fine-tune immune responses to enhance efficacy, paving the way for a new era in cancer treatment.

Increased global awareness regarding HPV transmission, associated health risks, and the benefits of vaccination is a major factor driving market growth. Public health campaigns, social media outreach, and school-based education initiatives have played a pivotal role in changing perceptions and encouraging vaccine acceptance. In countries with robust healthcare communication strategies, such as Australia and the UK, HPV vaccine uptake is notably high, reflecting the impact of consistent, evidence-based awareness efforts. Gender-neutral vaccination messaging has also improved acceptance among male populations, particularly in response to the growing incidence of oropharyngeal and anal cancers in men. As stigma around sexual health diminishes and more people recognize the long-term cancer prevention benefits of vaccination, broader demographic groups are being reached. These awareness initiatives are not only increasing demand but are also leading to earlier vaccination, higher compliance rates, and more consistent market growth.

Regulatory incentives are playing a crucial role in accelerating the personalized cancer vaccine industry. Programs like the EMA's PRIME scheme or the FDA's Breakthrough Therapy designation are designed to expedite the development of promising therapies for serious conditions. Moderna and Merck's mRNA-4157/V940 vaccine receiving PRIME status is a testament to the regulators' commitment to fostering innovation in oncology. This designation was based on positive interim data suggesting that patients with high-risk stage III/IV melanoma had improved outcomes post-surgery when treated with the vaccine alongside KEYTRUDA. Similarly, BioNTech's participation in major scientific forums like AACR 2024, where it revealed significant clinical updates, underscores growing regulatory and scientific validation. These developments help boost investor confidence, shorten time-to-market for novel therapies, and offer hope for cancer patients who have limited treatment options, especially in the adjuvant setting.

Personalized Cancer Vaccine Market Report Highlights

Based on type, the dendritic cell segment accounted for the largest market share of 100% in 2024, driven by increasing demand for targeted and individualized immunotherapies.

The cell-based technology segment led the market with a 100% revenue share in 2024, underpinned by its ability to harness the body's own immune system for targeted and adaptive anti-tumor responses. This segment includes therapies that utilize patient-derived cells, particularly dendritic cells, tumor-infiltrating lymphocytes (TILs), or engineered T-cells, to present tumor-specific antigens and stimulate a personalized immune attack against cancer cells.

The hospitals segment dominated the market with a revenue share of 58.87% in 2024 and is expected to grow at the fastest CAGR over the forecast period, driven by several key factors. Hospitals serve as primary centers for cancer diagnosis, treatment, and follow-up care

North America dominated the global market, with a share of 34.07% in 2024, driven by advancements in immunotherapy and a strong healthcare infrastructure. This growth is fueled by the increasing prevalence of cancer, with the U.S. alone reporting an estimated 1.9 million new cancer cases in 2022.

The global personalized vaccine industry is led by several major companies, including Dendreon Pharmaceuticals, LLC, Gritstone Bio, CureVac, NeoCura & Innovent, Stemirna Therapeutics, Dendreon Pharmaceuticals, LLC, Elicio Therapeutics, Evaxion Biotech, Imugene, and Nouscom, all of which are strengthening their worldwide presence through strategies like launching new products, forging strategic partnerships, and expanding into new geographic regions.

Companies Mentioned

Dendreon Pharmaceuticals, LLC
Gritstone Bio
CureVac
NeoCura & Innovent
Stemirna Therapeutics
Elicio Therapeutics
Evaxion Biotech

Imugene
Nouscom

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