

Recombinant Vaccine CDMO Market Size, Share & Trends Analysis Report By Vaccine, By Service (Contract Development, Regulatory Affairs), By Expression Platform, By Workflow (Clinical, Commercial), By Therapeutic Area, By End-use, By Region, And Segment Forecasts, 2026 - 2033

<https://marketpublishers.com/r/R8FB17A62338EN.html>

Date: August 2026

Pages: 250

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

ID: R8FB17A62338EN

Abstracts

The global recombinant vaccine CDMO market size was valued at USD 5.6 billion in 2025 and is projected to grow from USD 6.1 billion in 2026 to USD 12.4 billion by 2033, at a CAGR of 10.5% from 2026 to 2033. North America dominated the market, accounting for a revenue share of 43.8% in 2025. Market growth is driven by increasing demand for recombinant protein vaccines, expansion of vaccine development pipelines, and growing outsourcing of vaccine development and manufacturing activities.

Moreover, the need for specialized capabilities in recombinant antigen expression, upstream and downstream processing, formulation, and fill-finish services is increasing the demand for CDMO services. Technological advancements in recombinant expression systems, cell line development, process optimization, automation, and analytical testing are improving manufacturing efficiency, product consistency, and scalability.

Furthermore, the vaccine industry has witnessed continued growth in recent years, supported by increasing vaccine development activities and advances in recombinant protein technologies. The growing number of recombinant vaccine candidates across infectious disease indications is increasing demand for specialized development and manufacturing capabilities. These products require controlled antigen expression, purification, formulation, analytical characterization, and GMP-compliant manufacturing

processes. Thus, the expansion of recombinant vaccine development pipelines is expected to increase demand for specialized CDMO services in the coming years.

In addition, several pharmaceutical and biotechnology companies are increasingly outsourcing recombinant vaccine development and manufacturing activities to specialized CDMOs due to the technical expertise, specialized infrastructure, and capital requirements associated with in-house production. CDMOs provide process development, expression system optimization, scale-up, GMP manufacturing, analytical testing, formulation, and fill-finish services. This approach enables vaccine developers to access specialized manufacturing capabilities while reducing the need to establish dedicated production facilities. The trend is particularly relevant among emerging biotechnology companies progressing recombinant vaccine candidates through clinical development and requiring flexible manufacturing capacity.

Global Recombinant Vaccine CDMO Market Report Segmentation

This report forecasts revenue growth at a country level and provides an analysis of the latest industry trends in each of the sub-segments from 2021 to 2033. For this study, Grand View Research has segmented the global recombinant vaccine CDMO market report based on vaccine, service, expression platform, workflow, therapeutic area, end-use, and region:

Vaccine Outlook (Revenue, USD Billion, 2021 - 2033)

Recombinant Protein/Subunit Vaccines

Virus-Like Particle (VLP) Vaccines

Recombinant Viral Vector Vaccines

Recombinant DNA/mRNA-enabled Vaccines

Others

Service Outlook (Revenue, USD Billion, 2021 - 2033)

Contract Development

Cell Line Development

Process Development & Optimization

Analytical Testing & Method Validation

Scale-up & Tech Transfer

Contract Manufacturing

API Manufacturing

Finished Drug Products Manufacturing

Packaging and Labeling

Regulatory Affairs

Others

Expression Platform Outlook (Revenue, USD Billion, 2021 - 2033)

Mammalian Cell Expression

Microbial Expression

Cell-Based Expression

Plant-Based Expression

Others

Workflow (Revenue, USD Billion, 2021 - 2033)

Clinical

Commercial

Therapeutic Area (Revenue, USD Billion, 2021 - 2033)

Infectious Diseases

Oncology

Neurological Disorders

Other Applications

End-use Outlook (Revenue, USD Billion, 2021 - 2033)

Pharmaceutical Companies

Biotechnology Companies

Academic and Research Institutions

Others

Regional Outlook (Revenue, USD Billion, 2021 - 2033)

North America

U.S.

Canada

Mexico

Europe

UK

Germany

France

Italy

Spain

Sweden

Norway

Denmark

Asia Pacific

Japan

China

India

South Korea

Australia

Thailand

Latin America

Brazil

Argentina

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Oman

Qatar

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