

Global AAV Affinity Chromatography Resins Market Growth 2026-2032

<https://marketpublishers.com/r/G581F1A92672EN.html>

Date: October 2026

Pages: 95

Price: US\$ 3,660.00 (Single User License)

ID: G581F1A92672EN

Abstracts

The global AAV Affinity Chromatography Resins market size is predicted to grow from US\$ 12.78 million in 2025 to US\$ 32.20 million in 2032; it is expected to grow at a CAGR of 13.8% from 2026 to 2032.

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.

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.

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 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, 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 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 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

LP Information, Inc. (LPI) ' newest research report, the "AAV Affinity Chromatography

Resins Industry Forecast” looks at past sales and reviews total world AAV Affinity Chromatography Resins sales in 2025, providing a comprehensive analysis by region and market sector of projected AAV Affinity Chromatography Resins sales for 2026 through 2032. With AAV Affinity Chromatography Resins sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world AAV Affinity Chromatography Resins industry.

This Insight Report provides a comprehensive analysis of the global AAV Affinity Chromatography Resins landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on AAV Affinity Chromatography Resins portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global AAV Affinity Chromatography Resins market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for AAV Affinity Chromatography Resins and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global AAV Affinity Chromatography Resins.

This report presents a comprehensive overview, market shares, and growth opportunities of AAV Affinity Chromatography Resins market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Pan-Serotype AAV Affinity Resins

Limited Multi-Serotype AAV Affinity Resins

Serotype-Specific AAV Affinity Resins

Other

Segmentation by Matrix Material:

Cross-Linked Agarose Resins

Cross-Linked Polystyrene Divinylbenzene Resins

Polymethacrylate Resins

Polyvinyl Ether Resins

Other

Segmentation by Application:

HEK293-Derived AAV Purification

Sf9-Derived AAV Purification

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its

market penetration.

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.

Key Questions Addressed in this Report

What is the 10-year outlook for the global AAV Affinity Chromatography Resins market?

What factors are driving AAV Affinity Chromatography Resins market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do AAV Affinity Chromatography Resins market opportunities vary by end market size?

How does AAV Affinity Chromatography Resins break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

- 2.1.1 Global AAV Affinity Chromatography Resins Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for AAV Affinity Chromatography Resins by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for AAV Affinity Chromatography Resins by Country/Region, 2021, 2025 & 2032
- 2.2 AAV Affinity Chromatography Resins Segment by Type
 - 2.2.1 Pan-Serotype AAV Affinity Resins
 - 2.2.2 Limited Multi-Serotype AAV Affinity Resins
 - 2.2.3 Serotype-Specific AAV Affinity Resins
 - 2.2.4 Other
 - 2.2.5 AAV Affinity Chromatography Resins Sales by Type
 - 2.2.5.1 Global AAV Affinity Chromatography Resins Sales Market Share by Type (2021-2026)
 - 2.2.5.2 Global AAV Affinity Chromatography Resins Revenue and Market Share by Type (2021-2026)
 - 2.2.5.3 Global AAV Affinity Chromatography Resins Sale Price by Type (2021-2026)
- 2.3 AAV Affinity Chromatography Resins Segment by Matrix Material
 - 2.3.1 Cross-Linked Agarose Resins
 - 2.3.2 Cross-Linked Polystyrene Divinylbenzene Resins
 - 2.3.3 Polymethacrylate Resins
 - 2.3.4 Polyvinyl Ether Resins
 - 2.3.5 Other
 - 2.3.6 AAV Affinity Chromatography Resins Sales by Matrix Material

2.3.6.1 Global AAV Affinity Chromatography Resins Sales Market Share by Matrix Material (2021-2026)

2.3.6.2 Global AAV Affinity Chromatography Resins Revenue and Market Share by Matrix Material (2021-2026)

2.3.6.3 Global AAV Affinity Chromatography Resins Sale Price by Matrix Material (2021-2026)

2.4 AAV Affinity Chromatography Resins Segment by Application

2.4.1 HEK293-Derived AAV Purification

2.4.2 Sf9-Derived AAV Purification

2.4.3 Other

2.4.4 AAV Affinity Chromatography Resins Sales by Application

2.4.4.1 Global AAV Affinity Chromatography Resins Sale Market Share by Application (2021-2026)

2.4.4.2 Global AAV Affinity Chromatography Resins Revenue and Market Share by Application (2021-2026)

2.4.4.3 Global AAV Affinity Chromatography Resins Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global AAV Affinity Chromatography Resins Breakdown Data by Company

3.1.1 Global AAV Affinity Chromatography Resins Annual Sales by Company (2021-2026)

3.1.2 Global AAV Affinity Chromatography Resins Sales Market Share by Company (2021-2026)

3.2 Global AAV Affinity Chromatography Resins Annual Revenue by Company (2021-2026)

3.2.1 Global AAV Affinity Chromatography Resins Revenue by Company (2021-2026)

3.2.2 Global AAV Affinity Chromatography Resins Revenue Market Share by Company (2021-2026)

3.3 Global AAV Affinity Chromatography Resins Sale Price by Company

3.4 Key Manufacturers AAV Affinity Chromatography Resins Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers AAV Affinity Chromatography Resins Product Location Distribution

3.4.2 Players AAV Affinity Chromatography Resins Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR AAV AFFINITY CHROMATOGRAPHY RESINS BY GEOGRAPHIC REGION

4.1 World Historic AAV Affinity Chromatography Resins Market Size by Geographic Region (2021-2026)

4.1.1 Global AAV Affinity Chromatography Resins Annual Sales by Geographic Region (2021-2026)

4.1.2 Global AAV Affinity Chromatography Resins Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic AAV Affinity Chromatography Resins Market Size by Country/Region (2021-2026)

4.2.1 Global AAV Affinity Chromatography Resins Annual Sales by Country/Region (2021-2026)

4.2.2 Global AAV Affinity Chromatography Resins Annual Revenue by Country/Region (2021-2026)

4.3 Americas AAV Affinity Chromatography Resins Sales Growth

4.4 APAC AAV Affinity Chromatography Resins Sales Growth

4.5 Europe AAV Affinity Chromatography Resins Sales Growth

4.6 Middle East & Africa AAV Affinity Chromatography Resins Sales Growth

5 AMERICAS

5.1 Americas AAV Affinity Chromatography Resins Sales by Country

5.1.1 Americas AAV Affinity Chromatography Resins Sales by Country (2021-2026)

5.1.2 Americas AAV Affinity Chromatography Resins Revenue by Country (2021-2026)

5.2 Americas AAV Affinity Chromatography Resins Sales by Type (2021-2026)

5.3 Americas AAV Affinity Chromatography Resins Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC AAV Affinity Chromatography Resins Sales by Region

6.1.1 APAC AAV Affinity Chromatography Resins Sales by Region (2021-2026)

- 6.1.2 APAC AAV Affinity Chromatography Resins Revenue by Region (2021-2026)
- 6.2 APAC AAV Affinity Chromatography Resins Sales by Type (2021-2026)
- 6.3 APAC AAV Affinity Chromatography Resins Sales by Application (2021-2026)
- 6.4 China
- 6.5 Japan
- 6.6 South Korea
- 6.7 Southeast Asia
- 6.8 India
- 6.9 Australia
- 6.10 China Taiwan

7 EUROPE

- 7.1 Europe AAV Affinity Chromatography Resins by Country
 - 7.1.1 Europe AAV Affinity Chromatography Resins Sales by Country (2021-2026)
 - 7.1.2 Europe AAV Affinity Chromatography Resins Revenue by Country (2021-2026)
- 7.2 Europe AAV Affinity Chromatography Resins Sales by Type (2021-2026)
- 7.3 Europe AAV Affinity Chromatography Resins Sales by Application (2021-2026)
- 7.4 Germany
- 7.5 France
- 7.6 UK
- 7.7 Italy
- 7.8 Russia

8 MIDDLE EAST & AFRICA

- 8.1 Middle East & Africa AAV Affinity Chromatography Resins by Country
 - 8.1.1 Middle East & Africa AAV Affinity Chromatography Resins Sales by Country (2021-2026)
 - 8.1.2 Middle East & Africa AAV Affinity Chromatography Resins Revenue by Country (2021-2026)
- 8.2 Middle East & Africa AAV Affinity Chromatography Resins Sales by Type (2021-2026)
- 8.3 Middle East & Africa AAV Affinity Chromatography Resins Sales by Application (2021-2026)
- 8.4 Egypt
- 8.5 South Africa
- 8.6 Israel
- 8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of AAV Affinity Chromatography Resins

10.3 Manufacturing Process Analysis of AAV Affinity Chromatography Resins

10.4 Industry Chain Structure of AAV Affinity Chromatography Resins

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 AAV Affinity Chromatography Resins Distributors

11.3 AAV Affinity Chromatography Resins Customer

12 WORLD FORECAST REVIEW FOR AAV AFFINITY CHROMATOGRAPHY RESINS BY GEOGRAPHIC REGION

12.1 Global AAV Affinity Chromatography Resins Market Size Forecast by Region

12.1.1 Global AAV Affinity Chromatography Resins Forecast by Region (2027-2032)

12.1.2 Global AAV Affinity Chromatography Resins Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global AAV Affinity Chromatography Resins Forecast by Type (2027-2032)

12.7 Global AAV Affinity Chromatography Resins Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Thermo Fisher Scientific Inc.

13.1.1 Thermo Fisher Scientific Inc. Company Information

13.1.2 Thermo Fisher Scientific Inc. AAV Affinity Chromatography Resins Product Portfolios and Specifications

13.1.3 Thermo Fisher Scientific Inc. AAV Affinity Chromatography Resins Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Thermo Fisher Scientific Inc. Main Business Overview

13.1.5 Thermo Fisher Scientific Inc. Latest Developments

13.2 Danaher Corporation

13.2.1 Danaher Corporation Company Information

13.2.2 Danaher Corporation AAV Affinity Chromatography Resins Product Portfolios and Specifications

13.2.3 Danaher Corporation AAV Affinity Chromatography Resins Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Danaher Corporation Main Business Overview

13.2.5 Danaher Corporation Latest Developments

13.3 Repligen Corporation

13.3.1 Repligen Corporation Company Information

13.3.2 Repligen Corporation AAV Affinity Chromatography Resins Product Portfolios and Specifications

13.3.3 Repligen Corporation AAV Affinity Chromatography Resins Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 Repligen Corporation Main Business Overview

13.3.5 Repligen Corporation Latest Developments

13.4 Merck KGaA

13.4.1 Merck KGaA Company Information

13.4.2 Merck KGaA AAV Affinity Chromatography Resins Product Portfolios and Specifications

13.4.3 Merck KGaA AAV Affinity Chromatography Resins Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 Merck KGaA Main Business Overview

13.4.5 Merck KGaA Latest Developments

13.5 ChromaGenix LLC

13.5.1 ChromaGenix LLC Company Information

13.5.2 ChromaGenix LLC AAV Affinity Chromatography Resins Product Portfolios and Specifications

13.5.3 ChromaGenix LLC AAV Affinity Chromatography Resins Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 ChromaGenix LLC Main Business Overview

- 13.5.5 ChromaGenix LLC Latest Developments
- 13.6 Shanghai Duoning Biotechnology Co., Ltd.
 - 13.6.1 Shanghai Duoning Biotechnology Co., Ltd. Company Information
 - 13.6.2 Shanghai Duoning Biotechnology Co., Ltd. AAV Affinity Chromatography Resins Product Portfolios and Specifications
 - 13.6.3 Shanghai Duoning Biotechnology Co., Ltd. AAV Affinity Chromatography Resins Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.6.4 Shanghai Duoning Biotechnology Co., Ltd. Main Business Overview
 - 13.6.5 Shanghai Duoning Biotechnology Co., Ltd. Latest Developments
- 13.7 Changzhou Smart-Lifesciences Biotechnology Co., Ltd.
 - 13.7.1 Changzhou Smart-Lifesciences Biotechnology Co., Ltd. Company Information
 - 13.7.2 Changzhou Smart-Lifesciences Biotechnology Co., Ltd. AAV Affinity Chromatography Resins Product Portfolios and Specifications
 - 13.7.3 Changzhou Smart-Lifesciences Biotechnology Co., Ltd. AAV Affinity Chromatography Resins Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.7.4 Changzhou Smart-Lifesciences Biotechnology Co., Ltd. Main Business Overview
 - 13.7.5 Changzhou Smart-Lifesciences Biotechnology Co., Ltd. Latest Developments
- 13.8 Shanghai Yaonuo Biotechnology Co., Ltd.
 - 13.8.1 Shanghai Yaonuo Biotechnology Co., Ltd. Company Information
 - 13.8.2 Shanghai Yaonuo Biotechnology Co., Ltd. AAV Affinity Chromatography Resins Product Portfolios and Specifications
 - 13.8.3 Shanghai Yaonuo Biotechnology Co., Ltd. AAV Affinity Chromatography Resins Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.8.4 Shanghai Yaonuo Biotechnology Co., Ltd. Main Business Overview
 - 13.8.5 Shanghai Yaonuo Biotechnology Co., Ltd. Latest Developments
- 13.9 Kangyuan Medical Technology Dalian Co., Ltd.
 - 13.9.1 Kangyuan Medical Technology Dalian Co., Ltd. Company Information
 - 13.9.2 Kangyuan Medical Technology Dalian Co., Ltd. AAV Affinity Chromatography Resins Product Portfolios and Specifications
 - 13.9.3 Kangyuan Medical Technology Dalian Co., Ltd. AAV Affinity Chromatography Resins Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.9.4 Kangyuan Medical Technology Dalian Co., Ltd. Main Business Overview
 - 13.9.5 Kangyuan Medical Technology Dalian Co., Ltd. Latest Developments
- 13.10 Shangchun Biotechnology Wuhan Co., Ltd.
 - 13.10.1 Shangchun Biotechnology Wuhan Co., Ltd. Company Information
 - 13.10.2 Shangchun Biotechnology Wuhan Co., Ltd. AAV Affinity Chromatography Resins Product Portfolios and Specifications
 - 13.10.3 Shangchun Biotechnology Wuhan Co., Ltd. AAV Affinity Chromatography

Resins Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 Shangchun Biotechnology Wuhan Co., Ltd. Main Business Overview

13.10.5 Shangchun Biotechnology Wuhan Co., Ltd. Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. AAV Affinity Chromatography Resins Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. AAV Affinity Chromatography Resins Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Pan-Serotype AAV Affinity Resins

Table 4. Major Players of Limited Multi-Serotype AAV Affinity Resins

Table 5. Major Players of Serotype-Specific AAV Affinity Resins

Table 6. Major Players of Other

Table 7. Global AAV Affinity Chromatography Resins Sales by Type (2021-2026) & (L)

Table 8. Global AAV Affinity Chromatography Resins Sales Market Share by Type (2021-2026)

Table 9. Global AAV Affinity Chromatography Resins Revenue by Type (2021-2026) & (\$ million)

Table 10. Global AAV Affinity Chromatography Resins Revenue Market Share by Type (2021-2026)

Table 11. Global AAV Affinity Chromatography Resins Sale Price by Type (2021-2026) & (US\$/L)

Table 12. Major Players of Cross-Linked Agarose Resins

Table 13. Major Players of Cross-Linked Polystyrene Divinylbenzene Resins

Table 14. Major Players of Polymethacrylate Resins

Table 15. Major Players of Polyvinyl Ether Resins

Table 16. Major Players of Other

Table 17. Global AAV Affinity Chromatography Resins Sales by Matrix Material (2021-2026) & (L)

Table 18. Global AAV Affinity Chromatography Resins Sales Market Share by Matrix Material (2021-2026)

Table 19. Global AAV Affinity Chromatography Resins Revenue by Matrix Material (2021-2026) & (\$ million)

Table 20. Global AAV Affinity Chromatography Resins Revenue Market Share by Matrix Material (2021-2026)

Table 21. Global AAV Affinity Chromatography Resins Sale Price by Matrix Material (2021-2026) & (US\$/L)

Table 22. Global AAV Affinity Chromatography Resins Sale by Application (2021-2026) & (L)

Table 23. Global AAV Affinity Chromatography Resins Sale Market Share by

Application (2021-2026)

Table 24. Global AAV Affinity Chromatography Resins Revenue by Application (2021-2026) & (\$ million)

Table 25. Global AAV Affinity Chromatography Resins Revenue Market Share by Application (2021-2026)

Table 26. Global AAV Affinity Chromatography Resins Sale Price by Application (2021-2026) & (US\$/L)

Table 27. Global AAV Affinity Chromatography Resins Sales by Company (2021-2026) & (L)

Table 28. Global AAV Affinity Chromatography Resins Sales Market Share by Company (2021-2026)

Table 29. Global AAV Affinity Chromatography Resins Revenue by Company (2021-2026) & (\$ millions)

Table 30. Global AAV Affinity Chromatography Resins Revenue Market Share by Company (2021-2026)

Table 31. Global AAV Affinity Chromatography Resins Sale Price by Company (2021-2026) & (US\$/L)

Table 32. Key Manufacturers AAV Affinity Chromatography Resins Producing Area Distribution and Sales Area

Table 33. Players AAV Affinity Chromatography Resins Products Offered

Table 34. AAV Affinity Chromatography Resins Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 35. New Products and Potential Entrants

Table 36. Market M&A Activity & Strategy

Table 37. Global AAV Affinity Chromatography Resins Sales by Geographic Region (2021-2026) & (L)

Table 38. Global AAV Affinity Chromatography Resins Sales Market Share Geographic Region (2021-2026)

Table 39. Global AAV Affinity Chromatography Resins Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 40. Global AAV Affinity Chromatography Resins Revenue Market Share by Geographic Region (2021-2026)

Table 41. Global AAV Affinity Chromatography Resins Sales by Country/Region (2021-2026) & (L)

Table 42. Global AAV Affinity Chromatography Resins Sales Market Share by Country/Region (2021-2026)

Table 43. Global AAV Affinity Chromatography Resins Revenue by Country/Region (2021-2026) & (\$ millions)

Table 44. Global AAV Affinity Chromatography Resins Revenue Market Share by

Country/Region (2021-2026)

Table 45. Americas AAV Affinity Chromatography Resins Sales by Country (2021-2026) & (L)

Table 46. Americas AAV Affinity Chromatography Resins Sales Market Share by Country (2021-2026)

Table 47. Americas AAV Affinity Chromatography Resins Revenue by Country (2021-2026) & (\$ millions)

Table 48. Americas AAV Affinity Chromatography Resins Sales by Type (2021-2026) & (L)

Table 49. Americas AAV Affinity Chromatography Resins Sales by Application (2021-2026) & (L)

Table 50. APAC AAV Affinity Chromatography Resins Sales by Region (2021-2026) & (L)

Table 51. APAC AAV Affinity Chromatography Resins Sales Market Share by Region (2021-2026)

Table 52. APAC AAV Affinity Chromatography Resins Revenue by Region (2021-2026) & (\$ millions)

Table 53. APAC AAV Affinity Chromatography Resins Sales by Type (2021-2026) & (L)

Table 54. APAC AAV Affinity Chromatography Resins Sales by Application (2021-2026) & (L)

Table 55. Europe AAV Affinity Chromatography Resins Sales by Country (2021-2026) & (L)

Table 56. Europe AAV Affinity Chromatography Resins Revenue by Country (2021-2026) & (\$ millions)

Table 57. Europe AAV Affinity Chromatography Resins Sales by Type (2021-2026) & (L)

Table 58. Europe AAV Affinity Chromatography Resins Sales by Application (2021-2026) & (L)

Table 59. Middle East & Africa AAV Affinity Chromatography Resins Sales by Country (2021-2026) & (L)

Table 60. Middle East & Africa AAV Affinity Chromatography Resins Revenue Market Share by Country (2021-2026)

Table 61. Middle East & Africa AAV Affinity Chromatography Resins Sales by Type (2021-2026) & (L)

Table 62. Middle East & Africa AAV Affinity Chromatography Resins Sales by Application (2021-2026) & (L)

Table 63. Key Market Drivers & Growth Opportunities of AAV Affinity Chromatography Resins

Table 64. Key Market Challenges & Risks of AAV Affinity Chromatography Resins

Table 65. Key Industry Trends of AAV Affinity Chromatography Resins
Table 66. AAV Affinity Chromatography Resins Raw Material
Table 67. Key Suppliers of Raw Materials
Table 68. AAV Affinity Chromatography Resins Distributors List
Table 69. AAV Affinity Chromatography Resins Customer List
Table 70. Global AAV Affinity Chromatography Resins Sales Forecast by Region (2027-2032) & (L)
Table 71. Global AAV Affinity Chromatography Resins Revenue Forecast by Region (2027-2032) & (\$ millions)
Table 72. Americas AAV Affinity Chromatography Resins Sales Forecast by Country (2027-2032) & (L)
Table 73. Americas AAV Affinity Chromatography Resins Annual Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 74. APAC AAV Affinity Chromatography Resins Sales Forecast by Region (2027-2032) & (L)
Table 75. APAC AAV Affinity Chromatography Resins Annual Revenue Forecast by Region (2027-2032) & (\$ millions)
Table 76. Europe AAV Affinity Chromatography Resins Sales Forecast by Country (2027-2032) & (L)
Table 77. Europe AAV Affinity Chromatography Resins Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 78. Middle East & Africa AAV Affinity Chromatography Resins Sales Forecast by Country (2027-2032) & (L)
Table 79. Middle East & Africa AAV Affinity Chromatography Resins Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 80. Global AAV Affinity Chromatography Resins Sales Forecast by Type (2027-2032) & (L)
Table 81. Global AAV Affinity Chromatography Resins Revenue Forecast by Type (2027-2032) & (\$ millions)
Table 82. Global AAV Affinity Chromatography Resins Sales Forecast by Application (2027-2032) & (L)
Table 83. Global AAV Affinity Chromatography Resins Revenue Forecast by Application (2027-2032) & (\$ millions)
Table 84. Thermo Fisher Scientific Inc. Basic Information, AAV Affinity Chromatography Resins Manufacturing Base, Sales Area and Its Competitors
Table 85. Thermo Fisher Scientific Inc. AAV Affinity Chromatography Resins Product Portfolios and Specifications
Table 86. Thermo Fisher Scientific Inc. AAV Affinity Chromatography Resins Sales (L), Revenue (\$ Million), Price (US\$/L) and Gross Margin (2021-2026)

Table 87. Thermo Fisher Scientific Inc. Main Business
Table 88. Thermo Fisher Scientific Inc. Latest Developments
Table 89. Danaher Corporation Basic Information, AAV Affinity Chromatography Resins Manufacturing Base, Sales Area and Its Competitors
Table 90. Danaher Corporation AAV Affinity Chromatography Resins Product Portfolios and Specifications
Table 91. Danaher Corporation AAV Affinity Chromatography Resins Sales (L), Revenue (\$ Million), Price (US\$/L) and Gross Margin (2021-2026)
Table 92. Danaher Corporation Main Business
Table 93. Danaher Corporation Latest Developments
Table 94. Repligen Corporation Basic Information, AAV Affinity Chromatography Resins Manufacturing Base, Sales Area and Its Competitors
Table 95. Repligen Corporation AAV Affinity Chromatography Resins Product Portfolios and Specifications
Table 96. Repligen Corporation AAV Affinity Chromatography Resins Sales (L), Revenue (\$ Million), Price (US\$/L) and Gross Margin (2021-2026)
Table 97. Repligen Corporation Main Business
Table 98. Repligen Corporation Latest Developments
Table 99. Merck KGaA Basic Information, AAV Affinity Chromatography Resins Manufacturing Base, Sales Area and Its Competitors
Table 100. Merck KGaA AAV Affinity Chromatography Resins Product Portfolios and Specifications
Table 101. Merck KGaA AAV Affinity Chromatography Resins Sales (L), Revenue (\$ Million), Price (US\$/L) and Gross Margin (2021-2026)
Table 102. Merck KGaA Main Business
Table 103. Merck KGaA Latest Developments
Table 104. ChromaGenix LLC Basic Information, AAV Affinity Chromatography Resins Manufacturing Base, Sales Area and Its Competitors
Table 105. ChromaGenix LLC AAV Affinity Chromatography Resins Product Portfolios and Specifications
Table 106. ChromaGenix LLC AAV Affinity Chromatography Resins Sales (L), Revenue (\$ Million), Price (US\$/L) and Gross Margin (2021-2026)
Table 107. ChromaGenix LLC Main Business
Table 108. ChromaGenix LLC Latest Developments
Table 109. Shanghai Duoning Biotechnology Co., Ltd. Basic Information, AAV Affinity Chromatography Resins Manufacturing Base, Sales Area and Its Competitors
Table 110. Shanghai Duoning Biotechnology Co., Ltd. AAV Affinity Chromatography Resins Product Portfolios and Specifications
Table 111. Shanghai Duoning Biotechnology Co., Ltd. AAV Affinity Chromatography

Resins Sales (L), Revenue (\$ Million), Price (US\$/L) and Gross Margin (2021-2026)

Table 112. Shanghai Duoning Biotechnology Co., Ltd. Main Business

Table 113. Shanghai Duoning Biotechnology Co., Ltd. Latest Developments

Table 114. Changzhou Smart-Lifesciences Biotechnology Co., Ltd. Basic Information, AAV Affinity Chromatography Resins Manufacturing Base, Sales Area and Its Competitors

Table 115. Changzhou Smart-Lifesciences Biotechnology Co., Ltd. AAV Affinity Chromatography Resins Product Portfolios and Specifications

Table 116. Changzhou Smart-Lifesciences Biotechnology Co., Ltd. AAV Affinity Chromatography Resins Sales (L), Revenue (\$ Million), Price (US\$/L) and Gross Margin (2021-2026)

Table 117. Changzhou Smart-Lifesciences Biotechnology Co., Ltd. Main Business

Table 118. Changzhou Smart-Lifesciences Biotechnology Co., Ltd. Latest Developments

Table 119. Shanghai Yaonuo Biotechnology Co., Ltd. Basic Information, AAV Affinity Chromatography Resins Manufacturing Base, Sales Area and Its Competitors

Table 120. Shanghai Yaonuo Biotechnology Co., Ltd. AAV Affinity Chromatography Resins Product Portfolios and Specifications

Table 121. Shanghai Yaonuo Biotechnology Co., Ltd. AAV Affinity Chromatography Resins Sales (L), Revenue (\$ Million), Price (US\$/L) and Gross Margin (2021-2026)

Table 122. Shanghai Yaonuo Biotechnology Co., Ltd. Main Business

Table 123. Shanghai Yaonuo Biotechnology Co., Ltd. Latest Developments

Table 124. Kangyuan Medical Technology Dalian Co., Ltd. Basic Information, AAV Affinity Chromatography Resins Manufacturing Base, Sales Area and Its Competitors

Table 125. Kangyuan Medical Technology Dalian Co., Ltd. AAV Affinity Chromatography Resins Product Portfolios and Specifications

Table 126. Kangyuan Medical Technology Dalian Co., Ltd. AAV Affinity Chromatography Resins Sales (L), Revenue (\$ Million), Price (US\$/L) and Gross Margin (2021-2026)

Table 127. Kangyuan Medical Technology Dalian Co., Ltd. Main Business

Table 128. Kangyuan Medical Technology Dalian Co., Ltd. Latest Developments

Table 129. Shangchun Biotechnology Wuhan Co., Ltd. Basic Information, AAV Affinity Chromatography Resins Manufacturing Base, Sales Area and Its Competitors

Table 130. Shangchun Biotechnology Wuhan Co., Ltd. AAV Affinity Chromatography Resins Product Portfolios and Specifications

Table 131. Shangchun Biotechnology Wuhan Co., Ltd. AAV Affinity Chromatography Resins Sales (L), Revenue (\$ Million), Price (US\$/L) and Gross Margin (2021-2026)

Table 132. Shangchun Biotechnology Wuhan Co., Ltd. Main Business

Table 133. Shangchun Biotechnology Wuhan Co., Ltd. Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of AAV Affinity Chromatography Resins
- Figure 2. AAV Affinity Chromatography Resins Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global AAV Affinity Chromatography Resins Sales Growth Rate 2021-2032 (L)
- Figure 7. Global AAV Affinity Chromatography Resins Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. AAV Affinity Chromatography Resins Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. AAV Affinity Chromatography Resins Sales Market Share by Country/Region (2025)
- Figure 10. AAV Affinity Chromatography Resins Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Pan-Serotype AAV Affinity Resins
- Figure 12. Product Picture of Limited Multi-Serotype AAV Affinity Resins
- Figure 13. Product Picture of Serotype-Specific AAV Affinity Resins
- Figure 14. Product Picture of Other
- Figure 15. Global AAV Affinity Chromatography Resins Sales Market Share by Type in 2026
- Figure 16. Global AAV Affinity Chromatography Resins Revenue Market Share by Type (2021-2026)
- Figure 17. Product Picture of Cross-Linked Agarose Resins
- Figure 18. Product Picture of Cross-Linked Polystyrene Divinylbenzene Resins
- Figure 19. Product Picture of Polymethacrylate Resins
- Figure 20. Product Picture of Polyvinyl Ether Resins
- Figure 21. Product Picture of Other
- Figure 22. Global AAV Affinity Chromatography Resins Sales Market Share by Matrix Material in 2026
- Figure 23. Global AAV Affinity Chromatography Resins Revenue Market Share by Matrix Material (2021-2026)
- Figure 24. AAV Affinity Chromatography Resins Consumed in HEK293-Derived AAV Purification
- Figure 25. Global AAV Affinity Chromatography Resins Market: HEK293-Derived AAV Purification (2021-2026) & (L)

Figure 26. AAV Affinity Chromatography Resins Consumed in Sf9-Derived AAV Purification

Figure 27. Global AAV Affinity Chromatography Resins Market: Sf9-Derived AAV Purification (2021-2026) & (L)

Figure 28. AAV Affinity Chromatography Resins Consumed in Other

Figure 29. Global AAV Affinity Chromatography Resins Market: Other (2021-2026) & (L)

Figure 30. Global AAV Affinity Chromatography Resins Sale Market Share by Application (2025)

Figure 31. Global AAV Affinity Chromatography Resins Revenue Market Share by Application in 2025

Figure 32. AAV Affinity Chromatography Resins Sales by Company in 2025 (L)

Figure 33. Global AAV Affinity Chromatography Resins Sales Market Share by Company in 2025

Figure 34. AAV Affinity Chromatography Resins Revenue by Company in 2025 (\$ millions)

Figure 35. Global AAV Affinity Chromatography Resins Revenue Market Share by Company in 2025

Figure 36. Global AAV Affinity Chromatography Resins Sales Market Share by Geographic Region (2021-2026)

Figure 37. Global AAV Affinity Chromatography Resins Revenue Market Share by Geographic Region in 2025

Figure 38. Americas AAV Affinity Chromatography Resins Sales 2021-2026 (L)

Figure 39. Americas AAV Affinity Chromatography Resins Revenue 2021-2026 (\$ millions)

Figure 40. APAC AAV Affinity Chromatography Resins Sales 2021-2026 (L)

Figure 41. APAC AAV Affinity Chromatography Resins Revenue 2021-2026 (\$ millions)

Figure 42. Europe AAV Affinity Chromatography Resins Sales 2021-2026 (L)

Figure 43. Europe AAV Affinity Chromatography Resins Revenue 2021-2026 (\$ millions)

Figure 44. Middle East & Africa AAV Affinity Chromatography Resins Sales 2021-2026 (L)

Figure 45. Middle East & Africa AAV Affinity Chromatography Resins Revenue 2021-2026 (\$ millions)

Figure 46. Americas AAV Affinity Chromatography Resins Sales Market Share by Country in 2025

Figure 47. Americas AAV Affinity Chromatography Resins Revenue Market Share by Country (2021-2026)

Figure 48. Americas AAV Affinity Chromatography Resins Sales Market Share by Type (2021-2026)

Figure 49. Americas AAV Affinity Chromatography Resins Sales Market Share by Application (2021-2026)

Figure 50. United States AAV Affinity Chromatography Resins Revenue Growth 2021-2026 (\$ millions)

Figure 51. Canada AAV Affinity Chromatography Resins Revenue Growth 2021-2026 (\$ millions)

Figure 52. Mexico AAV Affinity Chromatography Resins Revenue Growth 2021-2026 (\$ millions)

Figure 53. Brazil AAV Affinity Chromatography Resins Revenue Growth 2021-2026 (\$ millions)

Figure 54. APAC AAV Affinity Chromatography Resins Sales Market Share by Region in 2025

Figure 55. APAC AAV Affinity Chromatography Resins Revenue Market Share by Region (2021-2026)

Figure 56. APAC AAV Affinity Chromatography Resins Sales Market Share by Type (2021-2026)

Figure 57. APAC AAV Affinity Chromatography Resins Sales Market Share by Application (2021-2026)

Figure 58. China AAV Affinity Chromatography Resins Revenue Growth 2021-2026 (\$ millions)

Figure 59. Japan AAV Affinity Chromatography Resins Revenue Growth 2021-2026 (\$ millions)

Figure 60. South Korea AAV Affinity Chromatography Resins Revenue Growth 2021-2026 (\$ millions)

Figure 61. Southeast Asia AAV Affinity Chromatography Resins Revenue Growth 2021-2026 (\$ millions)

Figure 62. India AAV Affinity Chromatography Resins Revenue Growth 2021-2026 (\$ millions)

Figure 63. Australia AAV Affinity Chromatography Resins Revenue Growth 2021-2026 (\$ millions)

Figure 64. China Taiwan AAV Affinity Chromatography Resins Revenue Growth 2021-2026 (\$ millions)

Figure 65. Europe AAV Affinity Chromatography Resins Sales Market Share by Country in 2025

Figure 66. Europe AAV Affinity Chromatography Resins Revenue Market Share by Country (2021-2026)

Figure 67. Europe AAV Affinity Chromatography Resins Sales Market Share by Type (2021-2026)

Figure 68. Europe AAV Affinity Chromatography Resins Sales Market Share by

Application (2021-2026)

Figure 69. Germany AAV Affinity Chromatography Resins Revenue Growth 2021-2026 (\$ millions)

Figure 70. France AAV Affinity Chromatography Resins Revenue Growth 2021-2026 (\$ millions)

Figure 71. UK AAV Affinity Chromatography Resins Revenue Growth 2021-2026 (\$ millions)

Figure 72. Italy AAV Affinity Chromatography Resins Revenue Growth 2021-2026 (\$ millions)

Figure 73. Russia AAV Affinity Chromatography Resins Revenue Growth 2021-2026 (\$ millions)

Figure 74. Middle East & Africa AAV Affinity Chromatography Resins Sales Market Share by Country (2021-2026)

Figure 75. Middle East & Africa AAV Affinity Chromatography Resins Sales Market Share by Type (2021-2026)

Figure 76. Middle East & Africa AAV Affinity Chromatography Resins Sales Market Share by Application (2021-2026)

Figure 77. Egypt AAV Affinity Chromatography Resins Revenue Growth 2021-2026 (\$ millions)

Figure 78. South Africa AAV Affinity Chromatography Resins Revenue Growth 2021-2026 (\$ millions)

Figure 79. Israel AAV Affinity Chromatography Resins Revenue Growth 2021-2026 (\$ millions)

Figure 80. Turkey AAV Affinity Chromatography Resins Revenue Growth 2021-2026 (\$ millions)

Figure 81. GCC Countries AAV Affinity Chromatography Resins Revenue Growth 2021-2026 (\$ millions)

Figure 82. Manufacturing Cost Structure Analysis of AAV Affinity Chromatography Resins in 2026

Figure 83. Manufacturing Process Analysis of AAV Affinity Chromatography Resins

Figure 84. Industry Chain Structure of AAV Affinity Chromatography Resins

Figure 85. Channels of Distribution

Figure 86. Global AAV Affinity Chromatography Resins Sales Market Forecast by Region (2027-2032)

Figure 87. Global AAV Affinity Chromatography Resins Revenue Market Share Forecast by Region (2027-2032)

Figure 88. Global AAV Affinity Chromatography Resins Sales Market Share Forecast by Type (2027-2032)

Figure 89. Global AAV Affinity Chromatography Resins Revenue Market Share

Forecast by Type (2027-2032)

Figure 90. Global AAV Affinity Chromatography Resins Sales Market Share Forecast by Application (2027-2032)

Figure 91. Global AAV Affinity Chromatography Resins Revenue Market Share Forecast by Application (2027-2032)

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