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Global GMP-grade AAV Vector Manufacturing Service Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global GMP-grade AAV Vector Manufacturing Service market size is predicted to grow from US$ 846 million in 2025 to US$ 2068 million in 2032; it is expected to grow at a CAGR of 13.7% from 2026 to 2032.

GMP-grade AAV vector manufacturing services refer to contract development and manufacturing activities performed under pharmaceutical good manufacturing practice requirements for recombinant adeno-associated viral vectors. The service scope generally includes process development, cell-bank establishment, GMP drug-substance manufacturing, purification, formulation, sterile filtration, fill and finish, quality testing, stability studies, batch release and regulatory support. Common production routes include adherent or suspension HEK293 transient transfection, stable producer-cell platforms and baculovirus-Sf9 systems. Key upstream inputs include GMP-grade transfer plasmids, Rep/Cap plasmids, helper plasmids, production cells, culture media, transfection reagents, nucleases, chromatography resins, filtration consumables, single-use bioreactors and analytical reagents. Major downstream customers include gene therapy developers, biotechnology companies, pharmaceutical companies, hospital translational platforms and research institutions, with applications covering IND submissions, clinical trials, process validation and commercial supply. The industry's overall gross margin is generally estimated at approximately 25%-40%.

The global market currently consists of large integrated CDMOs, specialized AAV manufacturers and regional cell and gene therapy service providers. Large CDMOs compete through global quality systems, multi-site manufacturing networks, commercial-batch experience and integrated fill-and-finish capabilities. Specialized AAV providers differentiate themselves through high-yield HEK293 cells, proprietary plasmid systems, capsid technologies and dedicated AAV facilities. Chinese and other Asia-Pacific

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providers compete primarily through cost, delivery speed, early-clinical project experience and integrated service offerings. Because clinical programs require consistent technology transfer, comparability, stability data and regulatory documentation, changing suppliers after a program enters GMP manufacturing is substantially more difficult than switching research-grade packaging vendors.

Demand growth is supported by the progression of AAV gene therapy programs into clinical development, indication expansion for approved products, tissue-specific capsid development and increasing outsourcing by small and mid-sized biotechnology companies. Neurological, ophthalmic, neuromuscular and rare metabolic diseases remain important sources of GMP projects, while dual-AAV systems, engineered capsids and gene-editing delivery create additional process-development requirements. Growth is becoming less dependent on the total number of discovery programs and more dependent on whether candidates reach IND submission, advance into later-stage trials and generate repeat manufacturing orders. Tightening expectations for product quality, manufacturing consistency, potency assays and comparability favor providers with integrated analytical, quality and regulatory capabilities.

Manufacturing technology is gradually shifting from adherent culture and highly customized workflows toward suspension culture, platform processes and stable producer-cell systems. Suspension HEK293 transient transfection remains the principal route for clinical-scale expansion, but plasmid and transfection-reagent costs, batch variability and scale-up complexity remain significant. Stable producer cells, dual-plasmid systems, baculovirus-Sf9 platforms and plasmid-free technologies may lower raw-material costs and improve consistency. Downstream competition is moving beyond vector-genome titer toward enrichment of full capsids, removal of empty and partially packaged particles and tighter control of host-cell DNA, host-cell proteins, residual plasmids and replication-competent AAV.

The main constraints include gene therapy financing and pipeline reprioritization, underutilized GMP capacity, high program attrition, elevated production costs and clinical safety events that may delay development. Some facilities built during the earlier investment cycle have experienced slower order ramp-up than initially expected, encouraging CDMOs to compete through platform processes, shorter timelines, flexible batch sizes and more aggressive commercial terms. AAV also faces inherent limitations involving payload capacity, pre-existing neutralizing antibodies, repeat dosing, high-dose toxicity and tissue-targeting efficiency. Lipid nanoparticles, nonviral delivery and other in vivo gene-editing platforms may therefore substitute for AAV in selected indications. Long-term leadership will depend more on productivity, product quality,

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successful regulatory filings, commercial supply capability and facility utilization than on nominal installed capacity alone.

LPI (LP Information)' newest research report, the “GMP-grade AAV Vector Manufacturing Service Industry Forecast” looks at past sales and reviews total world GMP-grade AAV Vector Manufacturing Service sales in 2025, providing a comprehensive analysis by region and market sector of projected GMP-grade AAV Vector Manufacturing Service sales for 2026 through 2032. With GMP-grade AAV Vector Manufacturing Service sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world GMP-grade AAV Vector Manufacturing Service industry.

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for GMP-grade AAV Vector Manufacturing Service 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 GMP-grade AAV Vector Manufacturing Service.

This report presents a comprehensive overview, market shares, and growth opportunities of GMP-grade AAV Vector Manufacturing Service market by product type, application, key players and key regions and countries.

Segmentation by Type:

GMP Drug Substance Manufacturing

GMP Drug Substance and Fill-Finish

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End-to-End CMC and Manufacturing

Segmentation by Development Stage:

Early Clinical Manufacturing

Late-stage Clinical Manufacturing

PPQ and Commercial Manufacturing

Segmentation by Production Platform:

Adherent HEK293

Suspension HEK293

Baculovirus-Sf9

Other

Segmentation by Application:

Biotechnology Companies

Pharmaceutical Companies

Other

This report also splits the market by region:

Americas

United States

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- Canada
- Mexico
- Brazil

APAC

- China
- Japan
- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa

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Israel

Turkey

GCC Countries

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

Thermo Fisher Scientific

Lonza

Charles River Laboratories

Catalent

AGC Biologics

SK pharmteco

OXB

Forge Biologics

Viralgen

Andelyn Biosciences

Resilience

Advanced Therapies

IDT Biologika

Matica Bio

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Takara Bio

VectorBuilder

GenScript ProBio

PackGene Biotech

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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 GMP-grade AAV Vector Manufacturing Service Market Size (2021-2032)
  2.1.2 GMP-grade AAV Vector Manufacturing Service Market Size CAGR by Region (2021 VS 2025 VS 2032)
  2.1.3 World Current & Future Analysis for GMP-grade AAV Vector Manufacturing Service by Country/Region (2021, 2025 & 2032)
2.2 GMP-grade AAV Vector Manufacturing Service Segment by Type
  2.2.1 GMP Drug Substance Manufacturing
  2.2.2 GMP Drug Substance and Fill-Finish
  2.2.3 End-to-End CMC and Manufacturing
  2.2.4 GMP-grade AAV Vector Manufacturing Service Market Size by Type
    2.2.4.1 GMP-grade AAV Vector Manufacturing Service Market Size CAGR by Type (2021 VS 2025 VS 2032)
    2.2.4.2 Global GMP-grade AAV Vector Manufacturing Service Market Size Market Share by Type (2021-2026)
2.3 GMP-grade AAV Vector Manufacturing Service Segment by Development Stage
  2.3.1 Early Clinical Manufacturing
  2.3.2 Late-stage Clinical Manufacturing
  2.3.3 PPQ and Commercial Manufacturing
  2.3.4 GMP-grade AAV Vector Manufacturing Service Market Size by Development Stage
    2.3.4.1 GMP-grade AAV Vector Manufacturing Service Market Size CAGR by Development Stage (2021 VS 2025 VS 2032)
    2.3.4.2 Global GMP-grade AAV Vector Manufacturing Service Market Size Market

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Share by Development Stage (2021-2026)
2.4 GMP-grade AAV Vector Manufacturing Service Segment by Production Platform
2.4.1 Adherent HEK293
2.4.2 Suspension HEK293
2.4.3 Baculovirus-Sf9
2.4.4 Other
2.4.5 GMP-grade AAV Vector Manufacturing Service Market Size by Production Platform
2.4.5.1 GMP-grade AAV Vector Manufacturing Service Market Size CAGR by Production Platform (2021 VS 2025 VS 2032)
2.4.5.2 Global GMP-grade AAV Vector Manufacturing Service Market Size Market Share by Production Platform (2021-2026)
2.5 GMP-grade AAV Vector Manufacturing Service Segment by Application
2.5.1 Biotechnology Companies
2.5.2 Pharmaceutical Companies
2.5.3 Other
2.5.4 GMP-grade AAV Vector Manufacturing Service Market Size by Application
2.5.4.1 GMP-grade AAV Vector Manufacturing Service Market Size CAGR by Application (2021 VS 2025 VS 2032)
2.5.4.2 Global GMP-grade AAV Vector Manufacturing Service Market Size Market Share by Application (2021-2026)

3 GMP-GRADE AAV VECTOR MANUFACTURING SERVICE MARKET SIZE BY PLAYER

3.1 GMP-grade AAV Vector Manufacturing Service Market Size Market Share by Player
3.1.1 Global GMP-grade AAV Vector Manufacturing Service Revenue by Player (2021-2026)
3.1.2 Global GMP-grade AAV Vector Manufacturing Service Revenue Market Share by Player (2021-2026)
3.2 Global GMP-grade AAV Vector Manufacturing Service Key Players Head office and Products Offered
3.3 Market Concentration Rate Analysis
3.3.1 Competition Landscape Analysis
3.3.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
3.4 New Products and Potential Entrants
3.5 Mergers & Acquisitions, Expansion

4 GMP-GRADE AAV VECTOR MANUFACTURING SERVICE BY REGION

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4.1 GMP-grade AAV Vector Manufacturing Service Market Size by Region (2021-2026)
4.2 Global GMP-grade AAV Vector Manufacturing Service Annual Revenue by Country/Region (2021-2026)
4.3 Americas GMP-grade AAV Vector Manufacturing Service Market Size Growth (2021-2026)
4.4 APAC GMP-grade AAV Vector Manufacturing Service Market Size Growth (2021-2026)
4.5 Europe GMP-grade AAV Vector Manufacturing Service Market Size Growth (2021-2026)
4.6 Middle East & Africa GMP-grade AAV Vector Manufacturing Service Market Size Growth (2021-2026)

5 AMERICAS

5.1 Americas GMP-grade AAV Vector Manufacturing Service Market Size by Country (2021-2026)
5.2 Americas GMP-grade AAV Vector Manufacturing Service Market Size by Type (2021-2026)
5.3 Americas GMP-grade AAV Vector Manufacturing Service Market Size by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC GMP-grade AAV Vector Manufacturing Service Market Size by Region (2021-2026)
6.2 APAC GMP-grade AAV Vector Manufacturing Service Market Size by Type (2021-2026)
6.3 APAC GMP-grade AAV Vector Manufacturing Service Market Size by Application (2021-2026)
6.4 China
6.5 Japan
6.6 South Korea
6.7 Southeast Asia
6.8 India

+357 96 030922
info@marketpublishers.com

6.9 Australia

7 EUROPE

7.1 Europe GMP-grade AAV Vector Manufacturing Service Market Size by Country (2021-2026)
7.2 Europe GMP-grade AAV Vector Manufacturing Service Market Size by Type (2021-2026)
7.3 Europe GMP-grade AAV Vector Manufacturing Service Market Size 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 GMP-grade AAV Vector Manufacturing Service by Region (2021-2026)
8.2 Middle East & Africa GMP-grade AAV Vector Manufacturing Service Market Size by Type (2021-2026)
8.3 Middle East & Africa GMP-grade AAV Vector Manufacturing Service Market Size 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 GLOBAL GMP-GRADE AAV VECTOR MANUFACTURING SERVICE MARKET FORECAST

+357 96 030922
info@marketpublishers.com

10.1 Global GMP-grade AAV Vector Manufacturing Service Forecast by Region (2027-2032)
10.1.1 Global GMP-grade AAV Vector Manufacturing Service Forecast by Region (2027-2032)
10.1.2 Americas GMP-grade AAV Vector Manufacturing Service Forecast
10.1.3 APAC GMP-grade AAV Vector Manufacturing Service Forecast
10.1.4 Europe GMP-grade AAV Vector Manufacturing Service Forecast
10.1.5 Middle East & Africa GMP-grade AAV Vector Manufacturing Service Forecast
10.2 Americas GMP-grade AAV Vector Manufacturing Service Forecast by Country (2027-2032)
10.2.1 United States Market GMP-grade AAV Vector Manufacturing Service Forecast
10.2.2 Canada Market GMP-grade AAV Vector Manufacturing Service Forecast
10.2.3 Mexico Market GMP-grade AAV Vector Manufacturing Service Forecast
10.2.4 Brazil Market GMP-grade AAV Vector Manufacturing Service Forecast
10.3 APAC GMP-grade AAV Vector Manufacturing Service Forecast by Region (2027-2032)
10.3.1 China GMP-grade AAV Vector Manufacturing Service Market Forecast
10.3.2 Japan Market GMP-grade AAV Vector Manufacturing Service Forecast
10.3.3 Korea Market GMP-grade AAV Vector Manufacturing Service Forecast
10.3.4 Southeast Asia Market GMP-grade AAV Vector Manufacturing Service Forecast
10.3.5 India Market GMP-grade AAV Vector Manufacturing Service Forecast
10.3.6 Australia Market GMP-grade AAV Vector Manufacturing Service Forecast
10.4 Europe GMP-grade AAV Vector Manufacturing Service Forecast by Country (2027-2032)
10.4.1 Germany Market GMP-grade AAV Vector Manufacturing Service Forecast
10.4.2 France Market GMP-grade AAV Vector Manufacturing Service Forecast
10.4.3 UK Market GMP-grade AAV Vector Manufacturing Service Forecast
10.4.4 Italy Market GMP-grade AAV Vector Manufacturing Service Forecast
10.4.5 Russia Market GMP-grade AAV Vector Manufacturing Service Forecast
10.5 Middle East & Africa GMP-grade AAV Vector Manufacturing Service Forecast by Region (2027-2032)
10.5.1 Egypt Market GMP-grade AAV Vector Manufacturing Service Forecast
10.5.2 South Africa Market GMP-grade AAV Vector Manufacturing Service Forecast
10.5.3 Israel Market GMP-grade AAV Vector Manufacturing Service Forecast
10.5.4 Turkey Market GMP-grade AAV Vector Manufacturing Service Forecast
10.6 Global GMP-grade AAV Vector Manufacturing Service Forecast by Type (2027-2032)
10.7 Global GMP-grade AAV Vector Manufacturing Service Forecast by Application (2027-2032)

+357 96 030922
info@marketpublishers.com

10.7.1 GCC Countries Market GMP-grade AAV Vector Manufacturing Service Forecast

11 KEY PLAYERS ANALYSIS

11.1 Thermo Fisher Scientific
11.1.1 Thermo Fisher Scientific Company Information
11.1.2 Thermo Fisher Scientific GMP-grade AAV Vector Manufacturing Service Product Offered
11.1.3 Thermo Fisher Scientific GMP-grade AAV Vector Manufacturing Service Revenue, Gross Margin and Market Share (2021-2026)
11.1.4 Thermo Fisher Scientific Main Business Overview
11.1.5 Thermo Fisher Scientific Latest Developments
11.2 Lonza
11.2.1 Lonza Company Information
11.2.2 Lonza GMP-grade AAV Vector Manufacturing Service Product Offered
11.2.3 Lonza GMP-grade AAV Vector Manufacturing Service Revenue, Gross Margin and Market Share (2021-2026)
11.2.4 Lonza Main Business Overview
11.2.5 Lonza Latest Developments
11.3 Charles River Laboratories
11.3.1 Charles River Laboratories Company Information
11.3.2 Charles River Laboratories GMP-grade AAV Vector Manufacturing Service Product Offered
11.3.3 Charles River Laboratories GMP-grade AAV Vector Manufacturing Service Revenue, Gross Margin and Market Share (2021-2026)
11.3.4 Charles River Laboratories Main Business Overview
11.3.5 Charles River Laboratories Latest Developments
11.4 Catalent
11.4.1 Catalent Company Information
11.4.2 Catalent GMP-grade AAV Vector Manufacturing Service Product Offered
11.4.3 Catalent GMP-grade AAV Vector Manufacturing Service Revenue, Gross Margin and Market Share (2021-2026)
11.4.4 Catalent Main Business Overview
11.4.5 Catalent Latest Developments
11.5 AGC Biologics
11.5.1 AGC Biologics Company Information
11.5.2 AGC Biologics GMP-grade AAV Vector Manufacturing Service Product Offered
11.5.3 AGC Biologics GMP-grade AAV Vector Manufacturing Service Revenue, Gross

+357 96 030922
info@marketpublishers.com

Margin and Market Share (2021-2026)
11.5.4 AGC Biologics Main Business Overview
11.5.5 AGC Biologics Latest Developments
11.6 SK pharmteco
11.6.1 SK pharmteco Company Information
11.6.2 SK pharmteco GMP-grade AAV Vector Manufacturing Service Product Offered
11.6.3 SK pharmteco GMP-grade AAV Vector Manufacturing Service Revenue, Gross Margin and Market Share (2021-2026)
11.6.4 SK pharmteco Main Business Overview
11.6.5 SK pharmteco Latest Developments
11.7 OXB
11.7.1 OXB Company Information
11.7.2 OXB GMP-grade AAV Vector Manufacturing Service Product Offered
11.7.3 OXB GMP-grade AAV Vector Manufacturing Service Revenue, Gross Margin and Market Share (2021-2026)
11.7.4 OXB Main Business Overview
11.7.5 OXB Latest Developments
11.8 Forge Biologics
11.8.1 Forge Biologics Company Information
11.8.2 Forge Biologics GMP-grade AAV Vector Manufacturing Service Product Offered
11.8.3 Forge Biologics GMP-grade AAV Vector Manufacturing Service Revenue, Gross Margin and Market Share (2021-2026)
11.8.4 Forge Biologics Main Business Overview
11.8.5 Forge Biologics Latest Developments
11.9 Viralgen
11.9.1 Viralgen Company Information
11.9.2 Viralgen GMP-grade AAV Vector Manufacturing Service Product Offered
11.9.3 Viralgen GMP-grade AAV Vector Manufacturing Service Revenue, Gross Margin and Market Share (2021-2026)
11.9.4 Viralgen Main Business Overview
11.9.5 Viralgen Latest Developments
11.10 Andelyn Biosciences
11.10.1 Andelyn Biosciences Company Information
11.10.2 Andelyn Biosciences GMP-grade AAV Vector Manufacturing Service Product Offered
11.10.3 Andelyn Biosciences GMP-grade AAV Vector Manufacturing Service Revenue, Gross Margin and Market Share (2021-2026)
11.10.4 Andelyn Biosciences Main Business Overview
11.10.5 Andelyn Biosciences Latest Developments

+357 96 030922
info@marketpublishers.com

11.11 Resilience
11.11.1 Resilience Company Information
11.11.2 Resilience GMP-grade AAV Vector Manufacturing Service Product Offered
11.11.3 Resilience GMP-grade AAV Vector Manufacturing Service Revenue, Gross Margin and Market Share (2021-2026)
11.11.4 Resilience Main Business Overview
11.11.5 Resilience Latest Developments
11.12 Advanced Therapies
11.12.1 Advanced Therapies Company Information
11.12.2 Advanced Therapies GMP-grade AAV Vector Manufacturing Service Product Offered
11.12.3 Advanced Therapies GMP-grade AAV Vector Manufacturing Service Revenue, Gross Margin and Market Share (2021-2026)
11.12.4 Advanced Therapies Main Business Overview
11.12.5 Advanced Therapies Latest Developments
11.13 IDT Biologika
11.13.1 IDT Biologika Company Information
11.13.2 IDT Biologika GMP-grade AAV Vector Manufacturing Service Product Offered
11.13.3 IDT Biologika GMP-grade AAV Vector Manufacturing Service Revenue, Gross Margin and Market Share (2021-2026)
11.13.4 IDT Biologika Main Business Overview
11.13.5 IDT Biologika Latest Developments
11.14 Matica Bio
11.14.1 Matica Bio Company Information
11.14.2 Matica Bio GMP-grade AAV Vector Manufacturing Service Product Offered
11.14.3 Matica Bio GMP-grade AAV Vector Manufacturing Service Revenue, Gross Margin and Market Share (2021-2026)
11.14.4 Matica Bio Main Business Overview
11.14.5 Matica Bio Latest Developments
11.15 Takara Bio
11.15.1 Takara Bio Company Information
11.15.2 Takara Bio GMP-grade AAV Vector Manufacturing Service Product Offered
11.15.3 Takara Bio GMP-grade AAV Vector Manufacturing Service Revenue, Gross Margin and Market Share (2021-2026)
11.15.4 Takara Bio Main Business Overview
11.15.5 Takara Bio Latest Developments
11.16 VectorBuilder
11.16.1 VectorBuilder Company Information
11.16.2 VectorBuilder GMP-grade AAV Vector Manufacturing Service Product Offered

+357 96 030922
info@marketpublishers.com

11.16.3 VectorBuilder GMP-grade AAV Vector Manufacturing Service Revenue, Gross Margin and Market Share (2021-2026)
11.16.4 VectorBuilder Main Business Overview
11.16.5 VectorBuilder Latest Developments
11.17 GenScript ProBio
11.17.1 GenScript ProBio Company Information
11.17.2 GenScript ProBio GMP-grade AAV Vector Manufacturing Service Product Offered
11.17.3 GenScript ProBio GMP-grade AAV Vector Manufacturing Service Revenue, Gross Margin and Market Share (2021-2026)
11.17.4 GenScript ProBio Main Business Overview
11.17.5 GenScript ProBio Latest Developments
11.18 PackGene Biotech
11.18.1 PackGene Biotech Company Information
11.18.2 PackGene Biotech GMP-grade AAV Vector Manufacturing Service Product Offered
11.18.3 PackGene Biotech GMP-grade AAV Vector Manufacturing Service Revenue, Gross Margin and Market Share (2021-2026)
11.18.4 PackGene Biotech Main Business Overview
11.18.5 PackGene Biotech Latest Developments

12 RESEARCH FINDINGS AND CONCLUSION

+357 96 030922
info@marketpublishers.com

List Of Tables

LIST OF TABLES

Table 1. GMP-grade AAV Vector Manufacturing Service Market Size CAGR by Region (2021 VS 2025 VS 2032) & ($ millions)
Table 2. GMP-grade AAV Vector Manufacturing Service Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of GMP Drug Substance Manufacturing
Table 4. Major Players of GMP Drug Substance and Fill-Finish
Table 5. Major Players of End-to-End CMC and Manufacturing
Table 6. GMP-grade AAV Vector Manufacturing Service Market Size CAGR by Type (2021 VS 2025 VS 2032) & ($ millions)
Table 7. Global GMP-grade AAV Vector Manufacturing Service Market Size by Type (2021-2026) & ($ millions)
Table 8. Global GMP-grade AAV Vector Manufacturing Service Market Size Market Share by Type (2021-2026)
Table 9. Major Players of Early Clinical Manufacturing
Table 10. Major Players of Late-stage Clinical Manufacturing
Table 11. Major Players of PPQ and Commercial Manufacturing
Table 12. GMP-grade AAV Vector Manufacturing Service Market Size CAGR by Development Stage (2021 VS 2025 VS 2032) & ($ millions)
Table 13. Global GMP-grade AAV Vector Manufacturing Service Market Size by Development Stage (2021-2026) & ($ millions)
Table 14. Global GMP-grade AAV Vector Manufacturing Service Market Size Market Share by Development Stage (2021-2026)
Table 15. Major Players of Adherent HEK293
Table 16. Major Players of Suspension HEK293
Table 17. Major Players of Baculovirus-Sf9
Table 18. Major Players of Other
Table 19. GMP-grade AAV Vector Manufacturing Service Market Size CAGR by Production Platform (2021 VS 2025 VS 2032) & ($ millions)
Table 20. Global GMP-grade AAV Vector Manufacturing Service Market Size by Production Platform (2021-2026) & ($ millions)
Table 21. Global GMP-grade AAV Vector Manufacturing Service Market Size Market Share by Production Platform (2021-2026)
Table 22. GMP-grade AAV Vector Manufacturing Service Market Size CAGR by Application (2021 VS 2025 VS 2032) & ($ millions)
Table 23. Global GMP-grade AAV Vector Manufacturing Service Market Size by

+357 96 030922
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Application (2021-2026) & ($ millions)
Table 24. Global GMP-grade AAV Vector Manufacturing Service Market Size Market Share by Application (2021-2026)
Table 25. Global GMP-grade AAV Vector Manufacturing Service Revenue by Player (2021-2026) & ($ millions)
Table 26. Global GMP-grade AAV Vector Manufacturing Service Revenue Market Share by Player (2021-2026)
Table 27. GMP-grade AAV Vector Manufacturing Service Key Players Head office and Products Offered
Table 28. GMP-grade AAV Vector Manufacturing Service Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 29. New Products and Potential Entrants
Table 30. Mergers & Acquisitions, Expansion
Table 31. Global GMP-grade AAV Vector Manufacturing Service Market Size by Region (2021-2026) & ($ millions)
Table 32. Global GMP-grade AAV Vector Manufacturing Service Market Size Market Share by Region (2021-2026)
Table 33. Global GMP-grade AAV Vector Manufacturing Service Revenue by Country/Region (2021-2026) & ($ millions)
Table 34. Global GMP-grade AAV Vector Manufacturing Service Revenue Market Share by Country/Region (2021-2026)
Table 35. Americas GMP-grade AAV Vector Manufacturing Service Market Size by Country (2021-2026) & ($ millions)
Table 36. Americas GMP-grade AAV Vector Manufacturing Service Market Size Market Share by Country (2021-2026)
Table 37. Americas GMP-grade AAV Vector Manufacturing Service Market Size by Type (2021-2026) & ($ millions)
Table 38. Americas GMP-grade AAV Vector Manufacturing Service Market Size Market Share by Type (2021-2026)
Table 39. Americas GMP-grade AAV Vector Manufacturing Service Market Size by Application (2021-2026) & ($ millions)
Table 40. Americas GMP-grade AAV Vector Manufacturing Service Market Size Market Share by Application (2021-2026)
Table 41. APAC GMP-grade AAV Vector Manufacturing Service Market Size by Region (2021-2026) & ($ millions)
Table 42. APAC GMP-grade AAV Vector Manufacturing Service Market Size Market Share by Region (2021-2026)
Table 43. APAC GMP-grade AAV Vector Manufacturing Service Market Size by Type (2021-2026) & ($ millions)

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info@marketpublishers.com

Table 44. APAC GMP-grade AAV Vector Manufacturing Service Market Size by Application (2021-2026) & ($ millions)
Table 45. Europe GMP-grade AAV Vector Manufacturing Service Market Size by Country (2021-2026) & ($ millions)
Table 46. Europe GMP-grade AAV Vector Manufacturing Service Market Size Market Share by Country (2021-2026)
Table 47. Europe GMP-grade AAV Vector Manufacturing Service Market Size by Type (2021-2026) & ($ millions)
Table 48. Europe GMP-grade AAV Vector Manufacturing Service Market Size by Application (2021-2026) & ($ millions)
Table 49. Middle East & Africa GMP-grade AAV Vector Manufacturing Service Market Size by Region (2021-2026) & ($ millions)
Table 50. Middle East & Africa GMP-grade AAV Vector Manufacturing Service Market Size by Type (2021-2026) & ($ millions)
Table 51. Middle East & Africa GMP-grade AAV Vector Manufacturing Service Market Size by Application (2021-2026) & ($ millions)
Table 52. Key Market Drivers & Growth Opportunities of GMP-grade AAV Vector Manufacturing Service
Table 53. Key Market Challenges & Risks of GMP-grade AAV Vector Manufacturing Service
Table 54. Key Industry Trends of GMP-grade AAV Vector Manufacturing Service
Table 55. Global GMP-grade AAV Vector Manufacturing Service Market Size Forecast by Region (2027-2032) & ($ millions)
Table 56. Global GMP-grade AAV Vector Manufacturing Service Market Size Market Share Forecast by Region (2027-2032)
Table 57. Global GMP-grade AAV Vector Manufacturing Service Market Size Forecast by Type (2027-2032) & ($ millions)
Table 58. Global GMP-grade AAV Vector Manufacturing Service Market Size Forecast by Application (2027-2032) & ($ millions)
Table 59. Thermo Fisher Scientific Details, Company Type, GMP-grade AAV Vector Manufacturing Service Area Served and Its Competitors
Table 60. Thermo Fisher Scientific GMP-grade AAV Vector Manufacturing Service Product Offered
Table 61. Thermo Fisher Scientific GMP-grade AAV Vector Manufacturing Service Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 62. Thermo Fisher Scientific Main Business
Table 63. Thermo Fisher Scientific Latest Developments
Table 64. Lonza Details, Company Type, GMP-grade AAV Vector Manufacturing Service Area Served and Its Competitors

+357 96 030922
info@marketpublishers.com

Table 65. Lonza GMP-grade AAV Vector Manufacturing Service Product Offered
Table 66. Lonza GMP-grade AAV Vector Manufacturing Service Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 67. Lonza Main Business
Table 68. Lonza Latest Developments
Table 69. Charles River Laboratories Details, Company Type, GMP-grade AAV Vector Manufacturing Service Area Served and Its Competitors
Table 70. Charles River Laboratories GMP-grade AAV Vector Manufacturing Service Product Offered
Table 71. Charles River Laboratories GMP-grade AAV Vector Manufacturing Service Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 72. Charles River Laboratories Main Business
Table 73. Charles River Laboratories Latest Developments
Table 74. Catalent Details, Company Type, GMP-grade AAV Vector Manufacturing Service Area Served and Its Competitors
Table 75. Catalent GMP-grade AAV Vector Manufacturing Service Product Offered
Table 76. Catalent GMP-grade AAV Vector Manufacturing Service Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 77. Catalent Main Business
Table 78. Catalent Latest Developments
Table 79. AGC Biologics Details, Company Type, GMP-grade AAV Vector Manufacturing Service Area Served and Its Competitors
Table 80. AGC Biologics GMP-grade AAV Vector Manufacturing Service Product Offered
Table 81. AGC Biologics GMP-grade AAV Vector Manufacturing Service Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 82. AGC Biologics Main Business
Table 83. AGC Biologics Latest Developments
Table 84. SK pharmteco Details, Company Type, GMP-grade AAV Vector Manufacturing Service Area Served and Its Competitors
Table 85. SK pharmteco GMP-grade AAV Vector Manufacturing Service Product Offered
Table 86. SK pharmteco GMP-grade AAV Vector Manufacturing Service Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 87. SK pharmteco Main Business
Table 88. SK pharmteco Latest Developments
Table 89. OXB Details, Company Type, GMP-grade AAV Vector Manufacturing Service Area Served and Its Competitors
Table 90. OXB GMP-grade AAV Vector Manufacturing Service Product Offered

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Table 91. OXB GMP-grade AAV Vector Manufacturing Service Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 92. OXB Main Business
Table 93. OXB Latest Developments
Table 94. Forge Biologics Details, Company Type, GMP-grade AAV Vector Manufacturing Service Area Served and Its Competitors
Table 95. Forge Biologics GMP-grade AAV Vector Manufacturing Service Product Offered
Table 96. Forge Biologics GMP-grade AAV Vector Manufacturing Service Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 97. Forge Biologics Main Business
Table 98. Forge Biologics Latest Developments
Table 99. Viralgen Details, Company Type, GMP-grade AAV Vector Manufacturing Service Area Served and Its Competitors
Table 100. Viralgen GMP-grade AAV Vector Manufacturing Service Product Offered
Table 101. Viralgen GMP-grade AAV Vector Manufacturing Service Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 102. Viralgen Main Business
Table 103. Viralgen Latest Developments
Table 104. Andelyn Biosciences Details, Company Type, GMP-grade AAV Vector Manufacturing Service Area Served and Its Competitors
Table 105. Andelyn Biosciences GMP-grade AAV Vector Manufacturing Service Product Offered
Table 106. Andelyn Biosciences GMP-grade AAV Vector Manufacturing Service Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 107. Andelyn Biosciences Main Business
Table 108. Andelyn Biosciences Latest Developments
Table 109. Resilience Details, Company Type, GMP-grade AAV Vector Manufacturing Service Area Served and Its Competitors
Table 110. Resilience GMP-grade AAV Vector Manufacturing Service Product Offered
Table 111. Resilience GMP-grade AAV Vector Manufacturing Service Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 112. Resilience Main Business
Table 113. Resilience Latest Developments
Table 114. Advanced Therapies Details, Company Type, GMP-grade AAV Vector Manufacturing Service Area Served and Its Competitors
Table 115. Advanced Therapies GMP-grade AAV Vector Manufacturing Service Product Offered
Table 116. Advanced Therapies GMP-grade AAV Vector Manufacturing Service

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Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 117. Advanced Therapies Main Business
Table 118. Advanced Therapies Latest Developments
Table 119. IDT Biologika Details, Company Type, GMP-grade AAV Vector Manufacturing Service Area Served and Its Competitors
Table 120. IDT Biologika GMP-grade AAV Vector Manufacturing Service Product Offered
Table 121. IDT Biologika GMP-grade AAV Vector Manufacturing Service Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 122. IDT Biologika Main Business
Table 123. IDT Biologika Latest Developments
Table 124. Matica Bio Details, Company Type, GMP-grade AAV Vector Manufacturing Service Area Served and Its Competitors
Table 125. Matica Bio GMP-grade AAV Vector Manufacturing Service Product Offered
Table 126. Matica Bio GMP-grade AAV Vector Manufacturing Service Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 127. Matica Bio Main Business
Table 128. Matica Bio Latest Developments
Table 129. Takara Bio Details, Company Type, GMP-grade AAV Vector Manufacturing Service Area Served and Its Competitors
Table 130. Takara Bio GMP-grade AAV Vector Manufacturing Service Product Offered
Table 131. Takara Bio GMP-grade AAV Vector Manufacturing Service Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 132. Takara Bio Main Business
Table 133. Takara Bio Latest Developments
Table 134. VectorBuilder Details, Company Type, GMP-grade AAV Vector Manufacturing Service Area Served and Its Competitors
Table 135. VectorBuilder GMP-grade AAV Vector Manufacturing Service Product Offered
Table 136. VectorBuilder GMP-grade AAV Vector Manufacturing Service Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 137. VectorBuilder Main Business
Table 138. VectorBuilder Latest Developments
Table 139. GenScript ProBio Details, Company Type, GMP-grade AAV Vector Manufacturing Service Area Served and Its Competitors
Table 140. GenScript ProBio GMP-grade AAV Vector Manufacturing Service Product Offered
Table 141. GenScript ProBio GMP-grade AAV Vector Manufacturing Service Revenue ($ million), Gross Margin and Market Share (2021-2026)

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Table 142. GenScript ProBio Main Business
Table 143. GenScript ProBio Latest Developments
Table 144. PackGene Biotech Details, Company Type, GMP-grade AAV Vector Manufacturing Service Area Served and Its Competitors
Table 145. PackGene Biotech GMP-grade AAV Vector Manufacturing Service Product Offered
Table 146. PackGene Biotech GMP-grade AAV Vector Manufacturing Service Revenue ($ million), Gross Margin and Market Share (2021-2026)
Table 147. PackGene Biotech Main Business
Table 148. PackGene Biotech Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. GMP-grade AAV Vector Manufacturing Service Report Years Considered
Figure 2. Research Objectives
Figure 3. Research Methodology
Figure 4. Research Process and Data Source
Figure 5. Global GMP-grade AAV Vector Manufacturing Service Market Size Growth Rate (2021-2032) ($ millions)
Figure 6. GMP-grade AAV Vector Manufacturing Service Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 7. GMP-grade AAV Vector Manufacturing Service Sales Market Share by Country/Region (2025)
Figure 8. GMP-grade AAV Vector Manufacturing Service Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 9. Global GMP-grade AAV Vector Manufacturing Service Market Size Market Share by Type in 2025
Figure 10. Global GMP-grade AAV Vector Manufacturing Service Market Size Market Share by Development Stage in 2025
Figure 11. Global GMP-grade AAV Vector Manufacturing Service Market Size Market Share by Production Platform in 2025
Figure 12. GMP-grade AAV Vector Manufacturing Service in Biotechnology Companies
Figure 13. Global GMP-grade AAV Vector Manufacturing Service Market: Biotechnology Companies (2021-2026) & ($ millions)
Figure 14. GMP-grade AAV Vector Manufacturing Service in Pharmaceutical Companies
Figure 15. Global GMP-grade AAV Vector Manufacturing Service Market: Pharmaceutical Companies (2021-2026) & ($ millions)
Figure 16. GMP-grade AAV Vector Manufacturing Service in Other
Figure 17. Global GMP-grade AAV Vector Manufacturing Service Market: Other (2021-2026) & ($ millions)
Figure 18. Global GMP-grade AAV Vector Manufacturing Service Market Size Market Share by Application in 2025
Figure 19. Global GMP-grade AAV Vector Manufacturing Service Revenue Market Share by Player in 2025
Figure 20. Global GMP-grade AAV Vector Manufacturing Service Market Size Market Share by Region (2021-2026)
Figure 21. Americas GMP-grade AAV Vector Manufacturing Service Market Size

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2021-2026 ($ millions)
Figure 22. APAC GMP-grade AAV Vector Manufacturing Service Market Size 2021-2026 ($ millions)
Figure 23. Europe GMP-grade AAV Vector Manufacturing Service Market Size 2021-2026 ($ millions)
Figure 24. Middle East & Africa GMP-grade AAV Vector Manufacturing Service Market Size 2021-2026 ($ millions)
Figure 25. Americas GMP-grade AAV Vector Manufacturing Service Value Market Share by Country in 2025
Figure 26. United States GMP-grade AAV Vector Manufacturing Service Market Size Growth 2021-2026 ($ millions)
Figure 27. Canada GMP-grade AAV Vector Manufacturing Service Market Size Growth 2021-2026 ($ millions)
Figure 28. Mexico GMP-grade AAV Vector Manufacturing Service Market Size Growth 2021-2026 ($ millions)
Figure 29. Brazil GMP-grade AAV Vector Manufacturing Service Market Size Growth 2021-2026 ($ millions)
Figure 30. APAC GMP-grade AAV Vector Manufacturing Service Market Size Market Share by Region in 2025
Figure 31. APAC GMP-grade AAV Vector Manufacturing Service Market Size Market Share by Type (2021-2026)
Figure 32. APAC GMP-grade AAV Vector Manufacturing Service Market Size Market Share by Application (2021-2026)
Figure 33. China GMP-grade AAV Vector Manufacturing Service Market Size Growth 2021-2026 ($ millions)
Figure 34. Japan GMP-grade AAV Vector Manufacturing Service Market Size Growth 2021-2026 ($ millions)
Figure 35. South Korea GMP-grade AAV Vector Manufacturing Service Market Size Growth 2021-2026 ($ millions)
Figure 36. Southeast Asia GMP-grade AAV Vector Manufacturing Service Market Size Growth 2021-2026 ($ millions)
Figure 37. India GMP-grade AAV Vector Manufacturing Service Market Size Growth 2021-2026 ($ millions)
Figure 38. Australia GMP-grade AAV Vector Manufacturing Service Market Size Growth 2021-2026 ($ millions)
Figure 39. Europe GMP-grade AAV Vector Manufacturing Service Market Size Market Share by Country in 2025
Figure 40. Europe GMP-grade AAV Vector Manufacturing Service Market Size Market Share by Type (2021-2026)

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Figure 41. Europe GMP-grade AAV Vector Manufacturing Service Market Size Market Share by Application (2021-2026)
Figure 42. Germany GMP-grade AAV Vector Manufacturing Service Market Size Growth 2021-2026 ($ millions)
Figure 43. France GMP-grade AAV Vector Manufacturing Service Market Size Growth 2021-2026 ($ millions)
Figure 44. UK GMP-grade AAV Vector Manufacturing Service Market Size Growth 2021-2026 ($ millions)
Figure 45. Italy GMP-grade AAV Vector Manufacturing Service Market Size Growth 2021-2026 ($ millions)
Figure 46. Russia GMP-grade AAV Vector Manufacturing Service Market Size Growth 2021-2026 ($ millions)
Figure 47. Middle East & Africa GMP-grade AAV Vector Manufacturing Service Market Size Market Share by Region (2021-2026)
Figure 48. Middle East & Africa GMP-grade AAV Vector Manufacturing Service Market Size Market Share by Type (2021-2026)
Figure 49. Middle East & Africa GMP-grade AAV Vector Manufacturing Service Market Size Market Share by Application (2021-2026)
Figure 50. Egypt GMP-grade AAV Vector Manufacturing Service Market Size Growth 2021-2026 ($ millions)
Figure 51. South Africa GMP-grade AAV Vector Manufacturing Service Market Size Growth 2021-2026 ($ millions)
Figure 52. Israel GMP-grade AAV Vector Manufacturing Service Market Size Growth 2021-2026 ($ millions)
Figure 53. Turkey GMP-grade AAV Vector Manufacturing Service Market Size Growth 2021-2026 ($ millions)
Figure 54. GCC Countries GMP-grade AAV Vector Manufacturing Service Market Size Growth 2021-2026 ($ millions)
Figure 55. Americas GMP-grade AAV Vector Manufacturing Service Market Size 2027-2032 ($ millions)
Figure 56. APAC GMP-grade AAV Vector Manufacturing Service Market Size 2027-2032 ($ millions)
Figure 57. Europe GMP-grade AAV Vector Manufacturing Service Market Size 2027-2032 ($ millions)
Figure 58. Middle East & Africa GMP-grade AAV Vector Manufacturing Service Market Size 2027-2032 ($ millions)
Figure 59. United States GMP-grade AAV Vector Manufacturing Service Market Size 2027-2032 ($ millions)
Figure 60. Canada GMP-grade AAV Vector Manufacturing Service Market Size

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2027-2032 ($ millions)
Figure 61. Mexico GMP-grade AAV Vector Manufacturing Service Market Size 2027-2032 ($ millions)
Figure 62. Brazil GMP-grade AAV Vector Manufacturing Service Market Size 2027-2032 ($ millions)
Figure 63. China GMP-grade AAV Vector Manufacturing Service Market Size 2027-2032 ($ millions)
Figure 64. Japan GMP-grade AAV Vector Manufacturing Service Market Size 2027-2032 ($ millions)
Figure 65. Korea GMP-grade AAV Vector Manufacturing Service Market Size 2027-2032 ($ millions)
Figure 66. Southeast Asia GMP-grade AAV Vector Manufacturing Service Market Size 2027-2032 ($ millions)
Figure 67. India GMP-grade AAV Vector Manufacturing Service Market Size 2027-2032 ($ millions)
Figure 68. Australia GMP-grade AAV Vector Manufacturing Service Market Size 2027-2032 ($ millions)
Figure 69. Germany GMP-grade AAV Vector Manufacturing Service Market Size 2027-2032 ($ millions)
Figure 70. France GMP-grade AAV Vector Manufacturing Service Market Size 2027-2032 ($ millions)
Figure 71. UK GMP-grade AAV Vector Manufacturing Service Market Size 2027-2032 ($ millions)
Figure 72. Italy GMP-grade AAV Vector Manufacturing Service Market Size 2027-2032 ($ millions)
Figure 73. Russia GMP-grade AAV Vector Manufacturing Service Market Size 2027-2032 ($ millions)
Figure 74. Egypt GMP-grade AAV Vector Manufacturing Service Market Size 2027-2032 ($ millions)
Figure 75. South Africa GMP-grade AAV Vector Manufacturing Service Market Size 2027-2032 ($ millions)
Figure 76. Israel GMP-grade AAV Vector Manufacturing Service Market Size 2027-2032 ($ millions)
Figure 77. Turkey GMP-grade AAV Vector Manufacturing Service Market Size 2027-2032 ($ millions)
Figure 78. Global GMP-grade AAV Vector Manufacturing Service Market Size Market Share Forecast by Type (2027-2032)
Figure 79. Global GMP-grade AAV Vector Manufacturing Service Market Size Market Share Forecast by Application (2027-2032)

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Figure 80. GCC Countries GMP-grade AAV Vector Manufacturing Service Market Size 2027-2032 ($ millions)

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