

Global Viral Vector Purification Media Market Growth 2026-2032

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Abstracts

The global Viral Vector Purification Media market size is predicted to grow from US\$ 115 million in 2025 to US\$ 393 million in 2032; it is expected to grow at a CAGR of 18.7% from 2026 to 2032.

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

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

The high-end market remains dominated by suppliers such as Cytiva, Thermo Fisher Scientific, Repligen, Sartorius, Bio-Rad, and Merck. Their competitive advantages stem from proprietary ligand development, manufacturing consistency, regulatory

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

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

LP Information, Inc. (LPI) ' newest research report, the "Viral Vector Purification Media Industry Forecast" looks at past sales and reviews total world Viral Vector Purification Media sales in 2025, providing a comprehensive analysis by region and market sector of projected Viral Vector Purification Media sales for 2026 through 2032. With Viral Vector Purification Media sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Viral Vector Purification Media industry.

This Insight Report provides a comprehensive analysis of the global Viral Vector Purification Media 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 Viral Vector Purification Media portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Viral Vector Purification Media market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Viral Vector Purification Media 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 Viral Vector Purification

Media.

This report presents a comprehensive overview, market shares, and growth opportunities of Viral Vector Purification Media market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

AAV Affinity Media

Anion Exchange Media

Cation Exchange Media

Mixed-Mode Media

Core-Bead Flow-Through Media

Monolith and Membrane Adsorbers

Segmentation by Vector Type:

AAV Vector

Lentiviral Vector

Adenoviral Vector

Retroviral Vector

Oncolytic Virus

VLP and Vaccine Virus

Segmentation by Process Step:

Capture

Intermediate Purification

Empty/Full Capsid Separation

Polishing

Impurity Clearance

Analytical Separation

Segmentation by Matrix Format:

Agarose Bead

Polymer Bead

Cellulose Bead

Ceramic Media

Monolith

Membrane or Nanofiber Adsorber

Segmentation by Application:

AAV Gene Therapy Vector Production

Lentiviral Vector Production

Adenoviral Vector and Vaccine Production

Oncolytic Virus and VLP Production

Process Development and Scale-Up

QC and Analytical Sample Preparation

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.

Cytiva

Thermo Fisher Scientific

Repligen

Sartorius

Bio-Rad

Merck

Tosoh Bioscience

Astrea Bioseparations

JNC

Sepax Technologies

Sunresin

Bestchrom

NanoMicro

BioToolomics

Key Questions Addressed in this Report

What is the 10-year outlook for the global Viral Vector Purification Media market?

What factors are driving Viral Vector Purification Media market growth, globally and by region?

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

How do Viral Vector Purification Media market opportunities vary by end market size?

How does Viral Vector Purification Media break out by Type, by Application?

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