

Adeno-Associated Viral Vectors / AAV Vector Market: Focus on AAV Based Gene Therapy and AAV Manufacturing by Type of Therapy (Gene Augmentation, Immunotherapy and Others), Type of Gene Delivery Method Used (Ex vivo and In vivo), Target Therapeutic Area (Genetic Disorders, Hematological Disorders, Infectious Diseases, Metabolic Disorders, Muscle Disorders, Ophthalmic Disorders, Neurological Disorders and Others), Application Area (Gene Therapy, Cell Therapy and Vaccine), Scale of Operation (Preclinical, Clinical and Commercial) and Geographical Regions (North America, Europe, Asia Pacific, MENA, Latin America and Rest of the World): Industry Trends and Global Forecasts, 2022-2035

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Abstracts

The global AAV vector market is expected to reach USD 1.9 billion in 2022 and is anticipated to grow at a CAGR of 14% during the forecast period 2022-2035

The surge in interest and demand for gene therapies, leveraging their potential to target disease causes at a cellular level, has been significant in recent years. Currently, more than 285 gene therapies are under evaluation across different clinical development stages. This growing demand has led to substantial capital influx, with gene therapy

developers raising over USD 10 billion in 2021 alone. In this burgeoning landscape, there is an increased need for innovative delivery methods. Among the available gene delivery vectors, adeno-associated viral vectors (AAV) have proven to be highly efficient. Six AAV-based gene therapies have received approval to date, with five recognized by the US FDA, the most recent in June 2023. Concurrently, numerous AAV-based therapies are undergoing assessment in various clinical trials. The trend shows a staggering 30% growth rate in clinical trials evaluating AAV-based gene therapy in recent years, with over 50 trials expected to conclude within the next three years.

To meet this rising demand, nearly 100 companies worldwide have emerged, focusing on AAV-based gene therapy development and manufacturing. Many of these entities offer sophisticated AAV technology platforms capable of producing adeno-associated viral vectors and related therapies across various operational scales, from small to large. The market trajectory for AAV-based gene therapy developers is expected to experience strong growth in the forecast period. This trajectory will be driven by collaborative support from AAV manufacturing companies and providers of advanced AAV technology platforms. The widespread recognition and adoption of AAV vectors as a safe and effective gene therapy delivery option are key factors fueling this promising market outlook.

Report Coverage

The report conducts an analysis of the AAV vectors market, examining factors such as therapy type, gene delivery methods, therapeutic targets, applications, operational scale, and geographical regions.

It evaluates market growth influencers like drivers, restraints, opportunities, and challenges.

Assessment of potential advantages, barriers, and competitive landscape for leading market players is provided.

Revenue forecasts for market segments are presented across six major regions.

A concise overview outlines the current state of the adeno-associated viral vectors market and its expected evolution in the medium to long term.

Comprehensive discussion covers structural design, life cycle dynamics, and applications of adeno-associated viral vectors, concluding with an analysis of

their inherent advantages and challenges.

Detailed examination of the AAV-based gene therapy market includes developmental phases, therapeutic areas, targeted genes, therapy types, delivery methods, administration routes, and special drug designations.

Examination of companies involved in AAV manufacturing encompasses establishment details, company size, headquarters, manufactured products, facility locations, manufacturing types, operational scale, and application areas.

Review of technologies offered by companies engaged in the AAV market categorized by types, operational scale, application areas, and identification of prominent market players.

Detailed profiles of marketed and advanced-stage AAV-based gene therapies cover development timelines, current status, mechanisms of action, associated AAV technologies, patent portfolios, dosage specifics, manufacturing details, and developer company information.

Tabulated profiles feature select AAV manufacturing companies, including overviews, financial performance (if available), vector manufacturing capabilities, and future outlook.

Analysis of company competitiveness in AAV manufacturing across regions utilizing a four-dimensional bubble representation considering supplier strength, manufacturing capabilities, service scope, and company size.

In-depth assessment of AAV vector technology platforms considering supplier strength, technology purpose, operational scale, and application areas.

Examination of completed, ongoing, and planned clinical trials, assessing parameters such as trial registration year, phase, therapeutic area, geography, sponsors, treatment sites, and enrolled patient populations.

Evaluation of collaborations and partnerships since 2017 focused on AAV manufacturing, examining partnership types, therapeutic areas, partner types, and regional distributions.

Insights into potential partnerships with AAV and gene therapy product

manufacturers, considering developer strength, product portfolio, therapeutic focus, and pipeline strength.

Comprehensive analysis of patents filed/granted for AAV-based therapies since 2017, including patent types, publication years, regional applicability, industry leaders in patent filings, and patent valuation.

Analysis of start-ups developing AAV-based gene therapy, evaluating their developmental stages, patents, partnerships, and key indicators.

Detailed analysis highlighting factors for AAV-based gene therapy developers to consider when deciding between in-house manufacturing or engaging Contract Manufacturing Organizations (CMOs), considering parameters for small, mid-sized, and large companies.

Key Market Companies

Abeona Therapeutics

Aldevron (Acquired by Danaher)

Oxford BioMedica

Sanofi (CEPiA, Sanofi Pasteur, Genzyme)

WuXi AppTec

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