

Cell Therapy Packaging Market by Type of Therapy (T-cell Therapies, Dendritic Cell Vaccines, Stem Cell Therapies, NK Cell Therapies and Other ATMPs), Package Engineering Design (Primary and Secondary Packaging), Scale of Operation (Clinical and Commercial) and Geography (North America, Europe, Asia Pacific and Rest of the World) , 2021-2030

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Abstracts

The cell therapy packaging market is expected to reach USD 221 million in 2021 and anticipated to grow at a CAGR of 19% during the forecast period 2021-2030.

Advanced therapy medicinal products, encompassing cell and gene therapies, have revolutionized healthcare delivery by effectively addressing a wide array of clinical conditions. More than 30 cell-based therapy products have secured marketing approval across different regions, while over 1,000 therapeutic candidates are undergoing clinical evaluation. The burgeoning investment prospects in the cell therapy packaging sector have garnered substantial attention from investors. Notably, between 2019 and 2020, there was a remarkable 240% surge in investment activity, marked by substantial capital infusion. However, the success of cell therapies critically depends on the safe and timely delivery of viable therapeutic cell doses to the designated patients. The intricate and demanding processes involving drug product manufacturing, packaging, and logistics for cell therapies are pivotal. Maintaining the stability of the product throughout the supply chain necessitates specific temperature conditions (such as cryogenic, ambient, or refrigerated) and specialized packaging materials. Given the personalized nature of most cell therapies, accurate labeling is paramount, and errors must be meticulously avoided.

Due to the costly and specialized equipment requirements, coupled with the complexities inherent in handling cell-based therapy products, pioneers in the healthcare industry are likely to engage contract service providers for their drug product production, packaging, and transportation needs. Regulatory bodies worldwide, such as the US Food and Drug Administration (FDA) and the International Air Transport Association (IATA), have established stringent guidelines for the packaging, storage, and transport of cell therapies. As most Contract Manufacturing Organizations (CMOs) / Contract Development and Manufacturing Organizations (CDMOs) possess capabilities aligned with prevailing global standards, forming strategic partnerships with these entities appears more prudent for therapy developers than establishing in-house capabilities. Currently, around 60 companies claim to provide cell therapy packaging services and associated products. Approximately 30% of operations linked to drug substance and drug product for advanced therapy medicinal products are already outsourced to competent CMOs / CDMOs. Furthermore, in recent years, numerous service providers have forged strategic alliances to bolster their capabilities and broaden their service offerings.

Given the upward trajectory of outsourcing in the healthcare sector and the continual augmentation of service providers' portfolios, it is anticipated that the cell therapy packaging market will sustain consistent growth in the projected period.

Report Coverage

The report conducts an analysis of the cell therapy packaging market, focusing on therapy type, package engineering design, operational scale, and key geographical regions.

It evaluates the market growth factors such as drivers, restraints, opportunities, and challenges, thereby assessing potential advantages and obstacles for stakeholders. Additionally, it offers insights into the competitive landscape for market leaders.

Revenue forecasts for market segments across four major regions are provided.

Examining the current market landscape for cell therapy packaging services involves a comprehensive analysis, considering factors like company establishment, size, headquarters, packaging design, active and passive packaging types, materials used, supported temperature ranges, handled cell types, and supplementary services provided.

A detailed assessment of the current market landscape of cell therapy packaging products entails specifying container types, fabrication materials, storage temperature conditions, packed cell types, and container usability. This analysis spotlights key providers based on establishment date, company size, headquarters, and industry significance.

A thorough competitiveness analysis of cell therapy packaging service providers across different regions will consider expertise, packaging portfolios, temperature support, service diversity, and company sizes to gauge industry competitiveness

A comprehensive review of partnerships between cell therapy packaging providers and developers from 2016 to 2021 will be presented, including partnership models, purposes, services covered, and geographical involvement.

A curated list of over 250 potential cell therapy developers expected to engage with packaging providers will be provided, based on criteria such as company size, therapy types, and pipeline maturity.

A case study will showcase companies claiming expertise in cell therapy development and manufacturing. It will outline establishment dates, sizes, headquarters, manufacturing locations, cell types, sources, operational scales, and offered manufacturing capabilities/services.

Detailed profiles of key players offering cell therapy packaging services and products will be included, covering company overviews, service and product portfolios, recent developments, and future outlooks.

Key Market Companies

Almac

Catalent Pharma Solutions

Cryoport Systems

Yourway

Lufthansa Cargo

Saint-Gobain Life Sciences

Thermo Fisher Scientific

West Pharmaceutical Services

Contents

1. PREFACE

- 1.1. Scope of the Report
- 1.2. Research Methodology
- 1.3. Key Questions Answered
- 1.4. Chapter Outlines

2. EXECUTIVE SUMMARY

3. INTRODUCTION

- 3.1. Chapter Overview
- 3.2. Pharmaceutical Filling and Packaging
- 3.3. Importance of Pharmaceutical Packaging
- 3.4. Types of Pharmaceutical Packaging
- 3.5. Packaging of Cell Therapies
 - 3.5.1. Primary Packaging
 - 3.5.2. Secondary Packaging
- 3.6. Cell Therapy Packaging: Key Considerations
- 3.7. Challenges associated with Cell Therapy Packaging
- 3.8. Concluding Remarks

4. CELL THERAPY PACKAGING SERVICE PROVIDERS: MARKET LANDSCAPE

- 4.1. Chapter Overview
- 4.2. Cell Therapy Packaging Service Providers Market Landscape
 - 4.2.1. Analysis by Year of Establishment
 - 4.2.2. Analysis by Company Size
 - 4.2.3. Analysis by Location of Headquarters
 - 4.2.4. Analysis by Package Engineering Design
 - 4.2.5. Analysis by Type of Packaging
 - 4.2.6. Analysis by Type of Packaging Material
 - 4.2.7. Analysis by Type of Passive System Used
 - 4.2.8. Analysis by Temperature Ranges Supported
 - 4.2.9. Analysis by Type of Cells Handled
 - 4.2.10. Analysis by Type of Additional Service(s) Offered
 - 4.2.11. Logo Landscape: Key Players offering Additional Services

5. CELL THERAPY PACKAGING PRODUCT PROVIDERS: MARKET LANDSCAPE

5.1. Chapter Overview

5.2. Cell Therapy Packaging Products: Market Landscape

5.2.1. Analysis by Type of Packaging Container

5.2.2. Analysis by Container Fabrication Material

5.2.3. Analysis by Type of Packaging Container and Container Fabrication Material

5.2.4. Analysis by Storage Temperature Conditions

5.2.5. Analysis by Type of Packaging Container and Storage Temperature Conditions

5.2.6. Analysis by Type of Cells Packed

5.2.7. Analysis by Usability of Container

5.3. Cell Therapy Packaging Product Providers

5.3.1. Analysis by Year of Establishment

5.3.2. Analysis by Company Size

5.3.3. Analysis by Location of Headquarters

6. CELL THERAPY PACKAGING SERVICE AND PRODUCT PROVIDERS: COMPANY PROFILES

6.1. Chapter Overview

6.2 Cell Therapy Packaging Service Providers

6.2.1. Almac

6.2.1.1. Company Overview

6.2.1.2. Cell Therapy Service Portfolio

6.2.1.3. Recent Developments and Future Outlook

6.2.2. Catalent Pharma Solutions

6.2.2.1. Company Overview

6.2.2.2. Cell Therapy Service Portfolio

6.2.2.3. Recent Developments and Future Outlook

6.2.3. Cryoport Systems

6.2.3.1. Company Overview

6.2.3.2. Cell Therapy Service Portfolio

6.2.3.3. Recent Developments Future Outlook

6.2.4. Yourway

6.2.4.1. Company Overview

6.2.4.2. Cell Therapy Service Portfolio

6.2.4.3. Recent Developments and Future Outlook

6.3. Cell Therapy Packaging Product Providers

- 6.3.1. Lufthansa Cargo
 - 6.3.1.1. Company Overview
 - 6.3.1.2. Cell Therapy Packaging Product Portfolio
 - 6.3.1.3. Recent Developments and Future Outlook
- 6.3.2. Saint-Gobain Life Sciences
 - 6.3.2.1. Company Overview
 - 6.3.2.2. Cell Therapy Packaging Product Portfolio
 - 6.3.2.3. Recent Developments and Future Outlook
- 6.3.3. Thermo Fisher Scientific
 - 6.3.3.1. Company Overview
 - 6.3.3.2. Cell Therapy Packaging Product Portfolio
 - 6.3.3.3. Recent Developments and Future Outlook
- 6.3.4. West Pharmaceutical Services
 - 6.3.4.1. Company Overview
 - 6.3.4.2. Cell Therapy Packaging Product Portfolio
 - 6.3.4.3. Recent Developments and Future Outlook

7. COMPANY COMPETITIVENESS ANALYSIS

- 7.1. Chapter Overview
- 7.2. Methodology and Key Input Parameters
- 7.3. Cell Therapy Packaging Service Providers
 - 7.3.1. Companies based in North America
 - 7.3.2. Companies based in Europe and Asia Pacific

8. PARTNERSHIPS AND COLLABORATIONS

- 8.1. Chapter Overview
- 8.2. Partnership Models
- 8.3. Cell Therapy Packaging: List of Partnerships and Collaborations
 - 8.3.1. Analysis by Year of Partnership
 - 8.3.2. Analysis by Type of Partnership
 - 8.3.3. Analysis by Year and Type of Partnership
 - 8.3.4. Analysis by Purpose of Partnership
 - 8.3.5. Analysis by Type of Service(s) Covered
 - 8.3.6. Most Active Players: Analysis by Number of Partnerships
 - 8.3.7. Regional Analysis
 - 8.3.8. Intercontinental and Intracontinental Agreements

9. LIKELY PARTNER ANALYSIS

9.1. Chapter Overview

9.2. Scope and Methodology

9.3. Potential Strategic Partners for Cell Therapy Packaging Providers in North America

9.3.1. Most Likely Partners

9.3.2. Likely Partners

9.3.3. Less Likely Partners

9.4. Potential Strategic Partners for Cell Therapy Packaging Providers in Europe

9.4.1. Most Likely Partners

9.4.2. Likely Partners

9.4.3. Less Likely Partners

9.5. Potential Strategic Partners for Cell Therapy Packaging Providers in Asia Pacific and Rest of the World

9.5.1. Most Likely Partners

9.5.2. Likely Partners

9.5.3. Less Likely Partners

10. CELL THERAPY DEVELOPERS AND MANUFACTURERS: CASE STUDY

10.1. Chapter Overview

10.2. Cell Therapy Manufacturers: Overall Market Landscape

10.2.1. Analysis by Year of Establishment

10.2.2. Analysis by Company Size

10.2.3. Analysis by Location of Headquarters

10.2.4. Analysis by Location of Manufacturing Facility

10.2.5. Analysis by Type of Cell(s) Manufactured

10.2.6. Analysis by Source of Cells

10.2.7. Analysis by Scale of Operation

10.2.8. Analysis by Manufacturing Capabilities / Services

10.2.9. Concluding Remarks

11. MARKET SIZING AND OPPORTUNITY ANALYSIS

11.1. Chapter Overview

11.2. Key Assumptions and Forecast Methodology

11.3 Global Cell Therapy Packaging Services Market, 2021-2030

11.4 Cell Therapy Packaging Services Market, 2021-2030: Distribution by Type of Cell Therapy

- 11.4.1. Cell Therapy Packaging Services Market for T-Cell Therapies, 2021-2030
- 11.4.2. Cell Therapy Packaging Services Market for Dendritic Cell Vaccines, 2021-2030
- 11.4.3. Cell Therapy Packaging Services Market for Stem Cell Therapies, 2021-2030
- 11.4.4. Cell Therapy Packaging Services Market for NK Cell Therapies, 2021-2030
- 11.4.5. Cell Therapy Packaging Services Market for Other Advanced Therapy Medical Products, 2021-2030
- 11.5. Cell Therapy Packaging Services Market, 2021-2030: Distribution by Package Engineering Design
 - 11.5.1. Cell Therapy Packaging Services Market for Primary Packaging, 2021-2030
 - 11.5.2. Cell Therapy Packaging Services Market for Secondary Packaging, 2021-2030
- 11.6. Cell Therapy Packaging Services Market, 2021-2030: Distribution by Scale of Operation
 - 11.6.1. Cell Therapy Packaging Services Market for Clinical Scale Operations, 2021-2030
 - 11.6.2. Cell Therapy Packaging Services Market for Commercial Scale Operations, 2021-2030
- 11.7. Cell Therapy Packaging Services Market, 2021-2030: Distribution by Geographical Regions
 - 11.7.1. Cell Therapy Packaging Services Market in North America, 2021-2030
 - 11.7.2. Cell Therapy Packaging Services Market in Europe, 2021-2030
 - 11.7.3. Cell Therapy Packaging Services Market in Asia Pacific, 2021-2030
 - 11.7.4. Cell Therapy Packaging Services Market in Rest of the World, 2021-2030

12. CONCLUDING REMARKS

- 12.1. Chapter Overview

13. APPENDIX 1: TABULATED DATA

14. APPENDIX 2: LIST OF COMPANIES AND ORGANIZATIONS

I would like to order

Product name: Cell Therapy Packaging Market by Type of Therapy (T-cell Therapies, Dendritic Cell Vaccines, Stem Cell Therapies, NK Cell Therapies and Other ATMPs), Package Engineering Design (Primary and Secondary Packaging), Scale of Operation (Clinical and Commercial) and Geography (North America, Europe, Asia Pacific and Rest of the World) , 2021-2030

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