

Middle East & Africa Cell and Gene Therapy Contract Development and Manufacturing Organization Market Size and Forecast (2021 - 2031)

<https://marketpublishers.com/r/MA6CD309C052EN.html>

Date: April 2026

Pages: 174

Price: US\$ 3,450.00 (Single User License)

ID: MA6CD309C052EN

Abstracts

The Middle East & Africa (MEA) market for Cell and Gene Therapy Contract Development and Manufacturing Organizations (CDMOs) is poised for significant growth, with projections indicating an increase from US\$ 90.3 million in 2024 to US\$ 434.1 million by 2031. This growth trajectory reflects a robust compound annual growth rate (CAGR) of 25.3% from 2025 to 2031, driven by various factors including heightened healthcare investments, a rising incidence of chronic and genetic diseases, and an increasing interest in advanced therapeutic modalities.

Market Overview

The MEA Cell and Gene Therapy CDMO market is primarily segmented into key regions: the United Arab Emirates (UAE), Saudi Arabia, South Africa, and the Rest of the Middle East & Africa. The growth in this market is significantly influenced by government initiatives in countries like the UAE and Saudi Arabia, which are investing heavily in biotechnology and life sciences as part of broader economic diversification strategies, such as Saudi Vision 2030. These initiatives aim to reduce dependence on oil revenues by promoting innovation-driven sectors, including biotechnology and personalized medicine. Consequently, there is a growing demand for local expertise in the development and manufacturing of complex therapies, such as cell and gene therapies.

Strategic Insights

Market Segmentation

The MEA Cell and Gene Therapy CDMO market can be segmented by service type, product type, and end user:

By Service Type: The market is divided into Drug Development and Manufacturing, Testing and Regulatory Services, and Others. Drug Development and Manufacturing is expected to hold the largest market share in 2024.

By Product Type: The market is categorized into Gene Therapy and Cell Therapy, with Gene Therapy anticipated to dominate the market share in 2024.

By End User: The end users include Pharmaceutical Companies, Biopharmaceutical Companies, and Others, with Biopharmaceutical Companies expected to hold the largest share in 2024.

Technological Advancements

The integration of artificial intelligence (AI), machine learning, and other digital technologies into manufacturing processes is revolutionizing the operations of CDMOs. These technologies enhance efficiency, reduce costs, and ensure compliance with regulatory standards. As cell and gene therapies become increasingly complex, the application of AI and digital tools is essential for meeting the demand for scalable and high-quality solutions.

For instance, in February 2025, NecstGen partnered with Digi.Bio to enhance testing and development for cell therapies. This collaboration utilizes Digi.Bio's advanced platform for dynamic multiparametric single-cell immunoprofiling, aiming to expedite the transition from concept to therapeutic application. The use of AI in process optimization and predictive analytics is expected to be a significant trend in the coming years. Machine learning algorithms are being employed to monitor real-time data, such as temperature, pH levels, and cell viability, allowing CDMOs to predict potential failures or deviations before they occur. This proactive approach enables timely corrective actions, minimizing downtime and improving the quality and yield of therapeutic products.

Moreover, traditional cell culture techniques for gene therapies are often labor-intensive and time-consuming. AI-based systems can automate various aspects of this process, including monitoring cell growth, optimizing nutrient delivery, and adjusting environmental conditions. This automation not only accelerates production timelines but

also reduces human error, which is critical in gene therapy where precision is paramount. For example, BioMarin Pharmaceutical has successfully implemented AI systems to automate cell culture monitoring, resulting in enhanced productivity and scalability.

Regulatory Compliance

Gene therapy manufacturing generates vast amounts of data that must be meticulously recorded and analyzed for regulatory compliance. AI and digital tools facilitate seamless data integration, ensuring that all necessary documentation is accurate and complete for regulatory review. This capability is increasingly important as regulatory bodies like the FDA and EMA maintain stringent standards for gene therapy manufacturing. CDMOs that leverage AI and digital platforms can more effectively manage the complexities of regulatory submissions and adapt to evolving standards.

Country Insights

The MEA Cell and Gene Therapy CDMO market is further segmented by country, with Saudi Arabia, South Africa, the UAE, and the Rest of the MEA being the primary regions. Notably, South Africa held the largest market share in 2024, bolstered by its established pharmaceutical industry, exemplified by companies like Aspen Pharmacare. Aspen's extensive experience in manufacturing biologics and active pharmaceutical ingredients positions it as a potential leader in the contract manufacturing space for advanced therapies. The existing infrastructure and expertise in South Africa can be leveraged to support the production of cell and gene therapies, addressing both local and international demands.

The prevalence of rare diseases in South Africa, where over 4.1 million individuals are affected, underscores the need for advanced therapeutic solutions, including gene therapies. CDMOs play a crucial role in advancing treatments for rare diseases through innovations in cell and gene therapies, providing specialized manufacturing infrastructure, regulatory support, and clinical trial services.

Key Players

Key players in the MEA Cell and Gene Therapy CDMO market include Charles River Laboratories International Inc, Catalent Inc, Lonza Group AG, WuXi Biologics Inc, Pluri Inc, Aenova Holding GmbH, Takara Bio Inc, FUJIFILM Holdings Corp, AGC Biologics AS, Thermo Fisher Scientific Inc., Minaris Advanced Therapies, and SK pharmteco Inc.

These companies are employing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative solutions to their clients.

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