

# **Vaccine Adjuvant Market Size and Forecast (2020 - 2030), Global and Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Adjuvant Class (Mineral Salt Adjuvant, Emulsion Adjuvant, Liposome Adjuvant, and Others), Type (Human Vaccine Adjuvant and Veterinary Vaccine Adjuvant), and Geography (North America, Europe, Asia Pacific, Middle East & Africa, and South & Central America)**

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## **Abstracts**

The vaccine adjuvants market is expected to grow from US\$ 2.482 billion in 2022 to US\$ 6.931 billion by 2028; it is expected to grow at a CAGR of 13.7% from 2022 to 2028. Support for developments in adjuvant studies and collaborative efforts for product launches creates opportunities for the vaccine adjuvant market, a standalone factor responsible for influential market growth driving the vaccine adjuvants market growth.

An adjuvant is a component added to vaccine preparations to create a stronger immune response in people receiving the vaccine. The rising occurrence of infectious disease outbreaks and pandemics and regulatory approvals of veterinary vaccine adjuvants are the key factors propelling the market development. However, product recall and adverse effects hamper the vaccine adjuvant market growth.

Growth Drivers:

Support for Developments in Adjuvant Studies and Collaborative Efforts for Product Launches Creates Opportunities for Vaccine Adjuvant Market

The National Institute of Allergy and Infectious Disease (NIAID) plays an important role in developing, discovering, and characterizing new vaccine adjuvants. The institute plays a crucial role in improving the efficacy of current vaccines, designing new or better vaccines against existing and emerging infectious diseases, and developing vaccines to treat allergies, autoimmune diseases, and cancer. Additionally, NIAID's vaccine adjuvant research program aims to develop a set of adjuvants, including candidates that can be matched with antigens to optimize the final vaccine efficacy. Therefore, to foster the collaboration between NIAID-supported vaccine adjuvant researchers and a broader scientific community, NIAID established the Vaccine Adjuvant Compendium (VAC) in 2020. This web-based tool displays adjuvant characteristics to help vaccine developers identify adjuvants suitable for their target disease.

Companies in the vaccine business, such as SK Biosciences and GSK, are producing adjuvants on a large scale to meet global demand by implementing growth strategies such as collaborations. For instance, in April 2022, SK Biosciences and GSK announced the submission of a biological license application for SKYCovione to the Korean Ministry of Food and Drug Safety (KMFDS) following positive data obtained in Phase 3 clinical trials. Therefore, the support provided by various government authorities to foster vaccine adjuvant research and development, collaborations between top manufacturers, and innovative product launches through such collaborative business strategies are likely to provide lucrative opportunities for the growth of the vaccine adjuvants market during the forecast period.

The mineral salt adjuvant segment held the largest share of the vaccine adjuvant market by adjuvant class 2022. The market for the emulsion adjuvant segment is anticipated to grow at the fastest CAGR of 14.6% during the forecast period. Mineral salts such as insoluble aluminum salts and calcium phosphates are used as adjuvants in vaccine formulations. Aluminum salt-based adjuvants help induce early and long-lasting protective immunity. Aluminum adjuvants indicated for use in human vaccines are regulated by the US Food and Drug Administration (FDA), and small amounts of aluminum are added to help the body build higher immunogenicity than the antigen alone in the vaccine. Mineral salt adjuvant formulation at the inflammatory site produces a fast immune response by releasing pro-inflammatory cytokines. Therefore, the ability of mineral salt-based adjuvants to induce a fast immune response toward antigens favors the vaccine adjuvants market growth.

In 2022, North America contributed the largest global vaccine adjuvant market share. Asia Pacific is expected to register the highest CAGR during 2022–2030. Accelerated

product approvals for vaccine adjuvants bolster market growth in North America. Additionally, the presence of top manufacturers producing adjuvants further enhances the overall market growth.

Fast product approval processes benefit the vaccine adjuvants market in the US. In May 2023, GlaxoSmithKline (GSK) won US Food and Drug Administration (FDA) approval for its Arexvy (respiratory syncytial virus vaccine, adjuvanted) vaccine intended for the prevention of lower respiratory tract disease (LRTD) caused by respiratory syncytial virus (RSV). Thus, Arexvy became the world's first FDA-approved RSV vaccine for older adults. In October 2022, Novavax, Inc. received an Emergency Use Authorization (EUA) from the FDA for its COVID-19 adjuvanted vaccine, indicated as a booster for adult patients.

#### Industry Developments and Future Opportunities:

Various strategic developments by leading players operating in the vaccine adjuvant market are listed below:

In April 2022, GSK plc and SK Bioscience submitted a biologics license application for SKYCovione, a recombinant protein-based, adjuvanted COVID-19 vaccine candidate. It contains GSK's pandemic adjuvant. The companies have submitted a biologics license application to the Korean Ministry of Food and Drug Safety following the positive data obtained in Phase III clinical trials.

In November 2021, Seppic launched MONTANIDE GEL P PR, an aqueous adjuvant based on a polymeric technology exclusively dedicated to avian injectable vaccines, meeting the need for innocuity in the avian market. In addition, MONTANIDE GEL P PR is particularly stable and can resist destabilizing antigenic media frequently used in avian vaccines.

In October 2023, SPI Pharma Inc. and Q-Vant Biosciences Inc. announced a partnership that combines Q-Vant's leadership in sustainable saponin extraction technology with SPI's global reach and servicing expertise in the pharmaceutical industry. The arrangement includes investment in expanding Q-Vant's proprietary 100% sustainable Q-SAP technology and an exclusive commercial agreement to accelerate the global adoption of their saponin adjuvants for veterinary and human vaccine formulations.

In January 2023, the Korean Ministry of Food and Drug Safety (KMFDS) granted SK Bioscience enhanced manufacturing and marketing authorization for Nuvaxovid™ to be administered to adults aged 18 and above as a booster.

## Contents

### **1. INTRODUCTION**

- 1.1 The Insight Partners Research Report Guidance
- 1.2 Market Segmentation

### **2. EXECUTIVE SUMMARY**

- 2.1 Key Insights

### **3. RESEARCH METHODOLOGY**

- 3.1 Coverage
- 3.2 Secondary Research
- 3.3 Primary Research

### **4. VACCINE ADJUVANTS MARKET LANDSCAPE**

- 4.1 PEST Analysis

### **5. VACCINE ADJUVANTS MARKET – KEY MARKET DYNAMICS**

- 5.1 Vaccine Adjuvants Market – Key Market Dynamics
- 5.2 Market Drivers
  - 5.2.1 Rising Number of Infectious Disease Outbreaks and Pandemic
  - 5.2.2 Approvals of Veterinary Vaccine Adjuvants
- 5.3 Market Restraints
  - 5.3.1 Product Recalls and Adverse Effects
- 5.4 Market Opportunity
  - 5.4.1 Support for Developments in Adjuvant Studies and Collaborative Efforts for Product Launches
- 5.5 Future Trends
  - 5.5.1 Technological Advancements
- 5.6 Impact of Drivers and Restraints:

### **6. VACCINE ADJUVANTS MARKET – GLOBAL MARKET ANALYSIS**

- 6.1 Vaccine Adjuvants Market Revenue (US\$ Million), 2022–2030

*Vaccine Adjuvant Market Size and Forecast (2020 - 2030), Global and Regional Share, Trend, and Growth Opportun...*

### 6.1.1 Overview

## 6.2 Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

## **7. VACCINE ADJUVANTS MARKET ANALYSIS – BY ADJUVANT CLASS**

### 7.1 Overview

#### 7.2 Mineral Salt Adjuvant

##### 7.2.1 Overview

##### 7.2.2 Mineral Salt Adjuvant: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

#### 7.3 Emulsion Adjuvant

##### 7.3.1 Overview

##### 7.3.2 Emulsion Adjuvant: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

#### 7.4 Liposome Adjuvant

##### 7.4.1 Overview

##### 7.4.2 Liposome Adjuvant: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

#### 7.5 Others

##### 7.5.1 Overview

##### 7.5.2 Others: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

## **8. VACCINE ADJUVANTS MARKET ANALYSIS – BY TYPE**

### 8.1 Human Vaccine Adjuvant

#### 8.1.1 Overview

#### 8.1.2 Human Vaccine Adjuvant: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

### 8.2 Veterinary Vaccine Adjuvant

#### 8.2.1 Overview

#### 8.2.2 Veterinary Vaccine Adjuvant: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

## **9. VACCINE ADJUVANTS MARKET – GEOGRAPHICAL ANALYSIS**

### 9.1 North America

#### 9.1.1 North America Vaccine Adjuvants Market Overview

#### 9.1.2 North America: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

9.1.2.1 North America: Vaccine Adjuvants Market – Revenue and Forecast Analysis – by Adjuvant Class

9.1.2.2 North America: Vaccine Adjuvants Market – Revenue and Forecast Analysis – by Type

9.1.3 North America: Vaccine Adjuvants Market – Revenue and Forecast Analysis – by Country

9.1.3.1 United States: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

9.1.3.1.1 Overview

9.1.3.1.2 United States: Glucose Monitoring Devices Market – Revenue and Forecast to 2030 (US\$ Million)

9.1.3.1.3 United States: Vaccine Adjuvants Market Breakdown, by Adjuvant Class

9.1.3.1.4 United States: Vaccine Adjuvants Market Breakdown, by Type

9.1.3.2 Canada: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

9.1.3.2.1 Overview

9.1.3.2.2 Canada: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

9.1.3.2.3 Canada: Vaccine Adjuvants Market Breakdown, by Adjuvant Class

9.1.3.2.4 Canada: Vaccine Adjuvants Market Breakdown, by Type

9.1.3.3 Mexico: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

9.1.3.3.1 Overview

9.1.3.3.2 Mexico: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

9.1.3.3.3 Mexico: Vaccine Adjuvants Market Breakdown, by Adjuvant Class

9.1.3.3.4 Mexico: Vaccine Adjuvants Market Breakdown, by Type

9.2 Europe

9.2.1 Europe Vaccine Adjuvants Market Overview

9.2.2 Europe: Vaccine Adjuvants Market Revenue and Forecast to 2030 (US\$ Million)

9.2.2.1 Europe: Vaccine Adjuvants Market – Revenue and Forecast Analysis – by Adjuvant Class

9.2.2.2 Europe: Vaccine Adjuvants Market – Revenue and Forecast Analysis – by Type

9.2.3 Europe: Vaccine Adjuvants Market

9.2.3.1 Germany: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

9.2.3.1.1 Overview

9.2.3.1.2 Germany: Glucose Monitoring Devices Market – Revenue and Forecast to



## 2030 (US\$ Million)

9.2.3.1.3 Germany: Vaccine Adjuvants Market Breakdown, by Adjuvant Class

9.2.3.1.4 Germany: Vaccine Adjuvants Market Breakdown, by Type

9.2.3.2 United Kingdom: Vaccine Adjuvants Market – Revenue and Forecast to 2030

### (US\$ Million)

9.2.3.2.1 Overview

9.2.3.2.2 United Kingdom: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

9.2.3.2.3 United Kingdom: Vaccine Adjuvants Market Breakdown, by Adjuvant Class

9.2.3.2.4 United Kingdom: Vaccine Adjuvants Market Breakdown, by Type

9.2.3.3 France: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

9.2.3.3.1 Overview

9.2.3.3.2 France: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

9.2.3.3.3 France: Vaccine Adjuvants Market Breakdown, by Adjuvant Class

9.2.3.3.4 France: Vaccine Adjuvants Market Breakdown, by Type

9.2.3.4 Italy: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

9.2.3.4.1 Overview

9.2.3.4.2 Italy: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

9.2.3.4.3 Italy: Vaccine Adjuvants Market Breakdown, by Adjuvant Class

9.2.3.4.4 Italy: Vaccine Adjuvants Market Breakdown, by Type

9.2.3.5 Spain: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

9.2.3.5.1 Overview

9.2.3.5.2 Spain: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

9.2.3.5.3 Spain: Vaccine Adjuvants Market Breakdown, by Adjuvant Class

9.2.3.5.4 Spain: Vaccine Adjuvants Market Breakdown, by Type

9.2.3.6 Rest of Europe: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

9.2.3.6.1 Overview

9.2.3.6.2 Rest of Europe: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

9.2.3.6.3 Rest of Europe: Vaccine Adjuvants Market Breakdown, by Adjuvant Class

9.2.3.6.4 Rest of Europe: Vaccine Adjuvants Market Breakdown, by Type

## 9.3 Asia Pacific



- 9.3.1 Asia Pacific Vaccine Adjuvants Market Overview
- 9.3.2 Asia Pacific: Vaccine Adjuvants Market
  - 9.3.2.1 Asia Pacific: Vaccine Adjuvants Market – Revenue and Forecast Analysis – by Adjuvant Class
- 9.3.3 Asia Pacific: Vaccine Adjuvants Market
  - 9.3.3.1 Asia Pacific: Vaccine Adjuvants Market – Revenue and Forecast Analysis – by Type
- 9.3.4 Asia Pacific: Vaccine Adjuvants Market – Revenue and Forecast Analysis – by Country
  - 9.3.4.1 China: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)
    - 9.3.4.1.1 Overview
    - 9.3.4.1.2 China: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)
    - 9.3.4.1.3 China: Vaccine Adjuvants Market Breakdown, by Adjuvant Class
    - 9.3.4.1.4 China: Vaccine Adjuvants Market Breakdown, by Type
  - 9.3.4.2 Japan: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)
    - 9.3.4.2.1 Overview
    - 9.3.4.2.2 Japan: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)
    - 9.3.4.2.3 Japan: Vaccine Adjuvants Market Breakdown, by Adjuvant Class
    - 9.3.4.2.4 Japan: Vaccine Adjuvants Market Breakdown, by Type
  - 9.3.4.3 India: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)
    - 9.3.4.3.1 Overview
    - 9.3.4.3.2 India: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)
    - 9.3.4.3.3 India: Vaccine Adjuvants Market Breakdown, by Adjuvant Class
    - 9.3.4.3.4 India: Vaccine Adjuvants Market Breakdown, by Type
  - 9.3.4.4 Australia: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)
    - 9.3.4.4.1 Overview
    - 9.3.4.4.2 Australia: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)
    - 9.3.4.4.3 Australia: Vaccine Adjuvants Market Breakdown, by Adjuvant Class
    - 9.3.4.4.4 Australia: Vaccine Adjuvants Market Breakdown, by Type
  - 9.3.4.5 South Korea: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

- 9.3.4.5.1 Overview
- 9.3.4.5.2 South Korea: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)
  - 9.3.4.5.3 South Korea: Vaccine Adjuvants Market Breakdown, by Adjuvant Class
  - 9.3.4.5.4 South Korea: Vaccine Adjuvants Market Breakdown, by Type
- 9.3.4.6 Rest of APAC: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)
  - 9.3.4.6.1 Overview
  - 9.3.4.6.2 Rest of APAC: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)
    - 9.3.4.6.3 Rest of APAC: Vaccine Adjuvants Market Breakdown, by Adjuvant Class
    - 9.3.4.6.4 Rest of APAC: Vaccine Adjuvants Market Breakdown, by Type
- 9.4 Middle East and Africa
  - 9.4.1 Middle East and Africa Vaccine Adjuvants Market Overview
  - 9.4.2 Middle East and Africa: Vaccine Adjuvants Market
    - 9.4.2.1 Middle East and Africa: Vaccine Adjuvants Market – Revenue and Forecast Analysis – by Adjuvant Class
    - 9.4.2.2 Middle East and Africa: Vaccine Adjuvants Market – Revenue and Forecast Analysis – by Type
  - 9.4.3 Middle East and Africa: Vaccine Adjuvants Market – Revenue and Forecast Analysis – by Country
    - 9.4.3.1 Saudi Arabia: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)
      - 9.4.3.1.1 Overview
      - 9.4.3.1.2 Saudi Arabia: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)
        - 9.4.3.1.3 Saudi Arabia: Vaccine Adjuvants Market Breakdown, by Adjuvant Class
        - 9.4.3.1.4 Saudi Arabia: Vaccine Adjuvants Market Breakdown, by Type
      - 9.4.3.2 South Africa: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)
        - 9.4.3.2.1 Overview
        - 9.4.3.2.2 South Africa: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)
          - 9.4.3.2.3 South Africa: Vaccine Adjuvants Market Breakdown, by Adjuvant Class
          - 9.4.3.2.4 South Africa: Vaccine Adjuvants Market Breakdown, by Type
        - 9.4.3.3 United Arab Emirates: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)
          - 9.4.3.3.1 Overview
          - 9.4.3.3.2 United Arab Emirates: Vaccine Adjuvants Market – Revenue and Forecast

to 2030 (US\$ Million)

9.4.3.3.3 United Arab Emirates: Vaccine Adjuvants Market Breakdown, by Adjuvant Class

9.4.3.3.4 United Arab Emirates: Vaccine Adjuvants Market Breakdown, by Type

9.4.3.4 Rest of Middle East and Africa: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

9.4.3.4.1 Overview

9.4.3.4.2 Rest of Middle East and Africa: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

9.4.3.4.3 Rest of Middle East and Africa: Vaccine Adjuvants Market Breakdown, by Adjuvant Class

9.4.3.4.4 Rest of Middle East and Africa: Vaccine Adjuvants Market Breakdown, by Type

9.5 South and Central America

9.5.1 South and Central America Vaccine Adjuvants Market Overview

9.5.2 South and Central America: Vaccine Adjuvants Market

9.5.2.1 South and Central America: Vaccine Adjuvants Market – Revenue and Forecast Analysis – by Adjuvant Class

9.5.3 South and Central America: Vaccine Adjuvants Market

9.5.3.1 South and Central America: Vaccine Adjuvants Market – Revenue and Forecast Analysis – by Type

9.5.4 South and Central America: Vaccine Adjuvants Market – Revenue and Forecast Analysis – by Country

9.5.4.1 Brazil: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

9.5.4.1.1 Overview

9.5.4.1.2 Brazil: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

9.5.4.1.3 Brazil: Vaccine Adjuvants Market Breakdown, by Adjuvant Class

9.5.4.1.4 Brazil: Vaccine Adjuvants Market Breakdown, by Type

9.5.4.2 Argentina: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

9.5.4.2.1 Overview

9.5.4.2.2 Argentina: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

9.5.4.2.3 Argentina: Vaccine Adjuvants Market Breakdown, by Adjuvant Class

9.5.4.2.4 Argentina: Vaccine Adjuvants Market Breakdown, by Type

9.5.4.3 Rest of South and Central America: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

#### 9.5.4.3.1 Overview

9.5.4.3.2 Rest of South and Central America: Vaccine Adjuvants Market – Revenue and Forecast to 2030 (US\$ Million)

9.5.4.3.3 Rest of South and Central America: Vaccine Adjuvants Market Breakdown, by Adjuvant Class

9.5.4.3.4 Rest of South and Central America: Vaccine Adjuvants Market Breakdown, by Type

## **10. INDUSTRY LANDSCAPE**

### 10.1 Overview

### 10.2 Growth Strategies in the Global Vaccine Adjuvants Market

### 10.3 Organic Developments

#### 10.3.1 Overview

### 10.4 Inorganic Developments

#### 10.4.1 Overview

## **11. COMPANY PROFILES**

### 11.1 SPI Pharma Inc

#### 11.1.1 Key Facts

#### 11.1.2 Business Description

#### 11.1.3 Products and Services

#### 11.1.4 Financial Overview

#### 11.1.5 SWOT Analysis

#### 11.1.6 Key Developments

### 11.2 GSK Plc

#### 11.2.1 Key Facts

#### 11.2.2 Business Description

#### 11.2.3 Products and Services

#### 11.2.4 Financial Overview

#### 11.2.5 SWOT Analysis

#### 11.2.6 THREATS

#### 11.2.7 Key Developments

### 11.3 CSL Ltd

#### 11.3.1 Key Facts

#### 11.3.2 Business Description

#### 11.3.3 Products and Services

#### 11.3.4 Financial Overview

- 11.3.5 SWOT Analysis
- 11.3.6 Key Developments
- 11.4 Seppic SA
  - 11.4.1 Key Facts
  - 11.4.2 Business Description
  - 11.4.3 Products and Services
  - 11.4.4 Financial Overview
  - 11.4.5 SWOT Analysis
  - 11.4.6 Key Developments
- 11.5 Hawaii Biotech Inc
  - 11.5.1 Key Facts
  - 11.5.2 Business Description
  - 11.5.3 Products and Services
  - 11.5.4 Financial Overview
  - 11.5.5 SWOT Analysis
  - 11.5.6 Key Developments
- 11.6 Dynavax Technologies Corp
  - 11.6.1 Key Facts
  - 11.6.2 Business Description
  - 11.6.3 Products and Services
  - 11.6.4 Financial Overview
  - 11.6.5 SWOT Analysis
  - 11.6.6 Key Developments
- 11.7 InvivoGen SAS
  - 11.7.1 Key Facts
  - 11.7.2 Business Description
  - 11.7.3 Products and Services
  - 11.7.4 Financial Overview
  - 11.7.5 SWOT Analysis
  - 11.7.6 Key Developments
- 11.8 Croda International Plc
  - 11.8.1 Key Facts
  - 11.8.2 Business Description
  - 11.8.3 Products and Services
  - 11.8.4 Financial Overview
  - 11.8.5 SWOT Analysis
  - 11.8.6 Key Developments
- 11.9 Novavax Inc
  - 11.9.1 Key Facts

- 11.9.2 Business Description
- 11.9.3 Products and Services
- 11.9.4 Financial Overview
- 11.9.5 SWOT Analysis
- 11.9.6 Key Developments
- 11.10 Phibro Animal Health Corp
  - 11.10.1 Key Facts
  - 11.10.2 Business Description
  - 11.10.3 Products and Services
  - 11.10.4 Financial Overview
  - 11.10.5 SWOT Analysis
  - 11.10.6 Key Developments

## **12. APPENDIX**

- 12.1 About The Insight Partners
- 12.1 Glossary of Terms

## List Of Tables

### LIST OF TABLES

Table 1. Vaccine Adjuvants Market Segmentation

Table 2. North America: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Adjuvant Class

Table 3. North America: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Type

Table 4. United States: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Adjuvant Class

Table 5. United States: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Type

Table 6. Canada: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Adjuvant Class

Table 7. Canada: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Type

Table 8. Mexico: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Adjuvant Class

Table 9. Mexico: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Type

Table 10. Europe: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Adjuvant Class

Table 11. Europe: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Type

Table 12. Germany: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Adjuvant Class

Table 13. Germany: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Type

Table 14. United Kingdom: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Adjuvant Class

Table 15. United Kingdom: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Type

Table 16. France: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Adjuvant Class

Table 17. France: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Type

Table 18. Italy: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Adjuvant Class



Table 19. Italy: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million)  
– by Type

Table 20. Spain: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Adjuvant Class

Table 21. Spain: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Type

Table 22. Rest of Europe: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Adjuvant Class

Table 23. Rest of Europe: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Type

Table 24. Asia Pacific: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Adjuvant Class

Table 25. Asia Pacific: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Type

Table 26. China: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Adjuvant Class

Table 27. China: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Type

Table 28. Japan: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Adjuvant Class

Table 29. Japan: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Type

Table 30. India: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Adjuvant Class

Table 31. India: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Type

Table 32. Australia: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Adjuvant Class

Table 33. Australia: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Type

Table 34. South Korea: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Adjuvant Class

Table 35. South Korea: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Type

Table 36. Rest of APAC: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Adjuvant Class

Table 37. Rest of APAC: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Type

Table 38. Middle East and Africa: Vaccine Adjuvants Market – Revenue and Forecast to

2030(US\$ Million) – by Adjuvant Class

Table 39. Middle East and Africa: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Type

Table 40. Saudi Arabia: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Adjuvant Class

Table 41. Saudi Arabia: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Type

Table 42. South Africa: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Adjuvant Class

Table 43. South Africa: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Type

Table 44. United Arab Emirates: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Adjuvant Class

Table 45. United Arab Emirates: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Type

Table 46. Rest of Middle East and Africa: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Adjuvant Class

Table 47. Rest of Middle East and Africa: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Type

Table 48. South and Central America: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Adjuvant Class

Table 49. South and Central America: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Type

Table 50. Brazil: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Adjuvant Class

Table 51. Brazil: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Type

Table 52. Argentina: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Adjuvant Class

Table 53. Argentina: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Type

Table 54. Rest of South and Central America: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Adjuvant Class

Table 55. Rest of South and Central America: Vaccine Adjuvants Market – Revenue and Forecast to 2030(US\$ Million) – by Type

Table 56. Organic Developments Done by Companies

Table 57. Inorganic Developments Done by Companies

Table 58. Glossary of Terms, Vaccine Adjuvants Market

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