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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

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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.

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

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