

Personalized Cancer Vaccine Market Size, Share and Growth Outlook 2026: By Technology, By Modality, By Application, By End-User, Companies to 2034

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Abstracts

The global Personalized Cancer Vaccine Market size is forecast to increase from \$343.47 Million in 2026 to \$5427.08 Million in 2034 at a CAGR of 41.2% between 2026 and 2034.

The Personalized Cancer Vaccine market report provides detailed analysis and outlook of Personalized Cancer Vaccine segments including By Technology (mRNA-based Vaccines, DNA-based Vaccines, Peptide-based Vaccines, Dendritic Cell-based Vaccines, Tumor Cell-based Vaccines), By Modality (Standalone Personalized Vaccines, Combination Therapies), By Application (Melanoma, Lung Cancer, Colorectal Cancer, Pancreatic Cancer, Prostate Cancer, Glioblastoma and Brain Tumors), By End-User (Hospitals and Specialized Oncology Centers, Ambulatory Care Centers, Academic and Research Institutes) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

Personalized Cancer Vaccine Industry Overview

Precision Immunotherapy, mRNA Platforms, and Artificial Intelligence Are Transforming Cancer Vaccine Development

The personalized cancer vaccine industry is entering a pivotal stage of development as advances in mRNA technology, neoantigen identification, genomic sequencing, and artificial intelligence accelerate the transition from experimental immunotherapies to clinically validated precision oncology platforms. Unlike conventional cancer therapies, personalized cancer vaccines are designed to target patient-specific tumor mutations,

enabling highly individualized immune responses against malignant cells. Pharmaceutical companies, academic institutions, and biotechnology developers are increasingly investing in personalized immunotherapy platforms capable of improving long-term disease control, reducing recurrence risk, and expanding treatment opportunities across both therapeutic and preventive oncology applications. The industry is also witnessing growing convergence between computational biology, genomic medicine, and advanced vaccine manufacturing technologies.

Personalized mRNA Vaccines Are Demonstrating Durable Clinical Benefits

The emergence of personalized mRNA cancer vaccines has become one of the most significant developments in oncology immunotherapy, particularly in high-risk solid tumors where recurrence remains a major clinical challenge. Long-term clinical evidence increasingly supports the ability of patient-specific vaccines to generate durable antitumor immunity when combined with established immunotherapies. This trend was reinforced by updated findings from the KEYNOTE-942/mRNA-4157-P201 clinical trial jointly developed by Moderna, Inc. and Merck. The investigational personalized mRNA vaccine intismeran autogene (mRNA-4157/V940), administered in combination with Keytruda for patients with completely resected high-risk melanoma, demonstrated sustained clinical benefit at five years of follow-up, reducing the risk of recurrence or death by 49% and lowering the risk of distant metastasis or death by 59% compared with immunotherapy alone. These findings strengthen the clinical rationale for personalized vaccine approaches in solid tumor management.

Preventive Cancer Vaccination Strategies Are Expanding Beyond Therapeutic Applications

The personalized cancer vaccine industry is increasingly extending into preventive oncology, particularly among genetically predisposed patient populations with elevated lifetime cancer risks. Advances in genomic screening and immunotherapy design are enabling the development of vaccines intended to prevent malignant transformation before cancer develops. This emerging trend is exemplified by the collaboration between Moderna and the University of Oxford to develop an mRNA-based cancer prevention vaccine for individuals with Lynch syndrome. Following regulatory authorization in the United Kingdom, the Phase 1/2 clinical study will evaluate the ability of the personalized vaccine platform to stimulate immune responses against precancerous lesions associated with hereditary cancer syndromes. This shift toward preventive precision immunotherapy represents a significant expansion of the personalized cancer vaccine paradigm.

Artificial Intelligence Is Accelerating Neoantigen Selection and Vaccine Development

Artificial intelligence and computational immunology have become essential components of personalized cancer vaccine development due to the complexity of identifying clinically relevant neoantigens from large genomic datasets. Machine learning algorithms increasingly enable more accurate prediction of tumor-specific immune targets and optimization of individualized vaccine design. This trend is demonstrated by the clinical progress reported by Evaxion A/S for its personalized melanoma vaccine EVX-01. Clinical data generated through the company's AI-Immunology platform demonstrated that 86% of computationally selected neoantigens successfully elicited measurable tumor-specific immune responses in patients enrolled in Phase 2 studies. The successful completion of long-term follow-up evaluations further reinforces the growing role of artificial intelligence in improving vaccine precision, enhancing immunogenicity prediction, and accelerating the development of personalized oncology therapeutics.

Personalized Cancer Vaccine Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Personalized Cancer Vaccine market is witnessing increasing investments in innovation, product development, digital transformation, artificial intelligence integration, healthcare infrastructure expansion, and strategic partnerships across developed and emerging economies. Key Companies in the industry include- BioNTech SE, Moderna, Inc., CureVac AG, Gritstone Bio, Inc., Sanofi (Translate Bio), Arcturus Therapeutics, Candel Therapeutics, Elicio Therapeutics, Evaxion, Immunomic Therapeutics. The Personalized Cancer Vaccine market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the Personalized Cancer Vaccine industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

Growth Personalized Cancer Vaccine Market size outlook across 3 scenarios-
High growth, reference, and Low growth cases

Market Trends, Drivers, Potential Opportunities, and Challenges faced by Personalized Cancer Vaccine companies

Porter's Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

Detailed SWOT Analysis of global and regional Personalized Cancer Vaccine markets

Competitive analysis including business description, product analysis, and financial profiles

Key country specific analysis detailing key factors shaping the short-term and long-term outlook

Recent industry developments and news including mergers, acquisitions, product launches, expansions, and company announcements

Personalized Cancer Vaccine Market Competitive Benchmarking and Company Analysis

Leading companies in Personalized Cancer Vaccine industry include- BioNTech SE, Moderna, Inc., CureVac AG, Gritstone Bio, Inc., Sanofi (Translate Bio), Arcturus Therapeutics, Candel Therapeutics, Elicio Therapeutics, Evaxion, Immunomic Therapeutics. The Personalized Cancer Vaccine market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US Personalized Cancer Vaccine Markets in 2026 and beyond- Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach \$8.2 Trillion in 2034 from \$5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the Personalized Cancer Vaccine market remains one of the strongest-performing segments in the country.

The US Personalized Cancer Vaccine Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance efficiency and cost management. The US Personalized Cancer Vaccine market faces successive waves of challenging trends, with strong opportunities across select segments. The CMS plan to implement Medicaid from 2027 is driving states to build eligibility verification systems throughout 2026. Looking ahead to 2034, we anticipate stronger results underpinned by opportunities exist across Personalized Cancer Vaccine industry. On the medical device front, over 7,000 device manufacturers continue to gain from increasing demand from demand for implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of Canadian Personalized Cancer Vaccine markets

Canada's strong Personalized Cancer Vaccine sales performance is underpinned by an aging population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-sized enterprises across medical, diagnostic, and therapeutic devices. The Canadian Personalized Cancer Vaccine market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany Personalized Cancer Vaccine Trends and Perspectives to 2034- Financial sustainability, hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest Personalized Cancer Vaccine market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering 90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of Personalized Cancer Vaccine population. In particular, Research and development in

Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Personalized Cancer Vaccine industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the Personalized Cancer Vaccine market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support Personalized Cancer Vaccine sales through 2034

France Personalized Cancer Vaccine companies are emphasizing on opportunities for rapid, at-scale innovation to boost profitability over the long-term. The country's National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease management initiatives, workforce reforms, and efforts to improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics. INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were 651,000, producing a negative natural balance of about 6,000 for the first time since the end of the Second World War.

UK Personalized Cancer Vaccine Market Size, Share, and Growth Projections to 2034- Rapid growth driven by new and existing brands across the industry value chain

Small high-need consumer segments remain key priority of Personalized Cancer Vaccine distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or ?280 billion in 2025. According to the ONS, total healthcare spending grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was ?49 billion (14.1%) and voluntary health insurance was ?9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England's plan to give more than 500,000 staff access to new AI tools.

China Personalized Cancer Vaccine Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

China Personalized Cancer Vaccine market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of Personalized Cancer Vaccine industry, offering opportunities for both competition and partnership. Over the forecast period, new and innovative product launches remain key elements driving market outlook. China's healthcare industry is increasingly centered on expanding healthcare capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China's basic medical insurance covered 1.32662 billion people and the coverage rate was 95%. Regional disparities in consumer spending trends continue to become more pronounced in the Chinese Personalized Cancer Vaccine industry. Over the forecast period, demand will keep shifting toward geriatrics, chronic disease management, rehabilitation, long-term care, and outpatient care, while pricing pressure will remain intense in drugs and consumables because reimbursement.

India Personalized Cancer Vaccine Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian Personalized Cancer Vaccine market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to make world-class diagnostics, robotics, and critical care devices.

Brazil Personalized Cancer Vaccine market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts,

with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

Middle East and Africa Personalized Cancer Vaccine Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500 million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader MEA region one of the fastest-growing healthcare demand centers globally. The GCC countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to account for a disproportionately large share of regional healthcare spending.

Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria, and Kenya remain key healthcare markets due to their large populations, expanding private healthcare sectors, and growing investments in healthcare delivery systems.

Personalized Cancer Vaccine Market Segmentation

By Technology

mRNA-based Vaccines

DNA-based Vaccines

Peptide-based Vaccines

Dendritic Cell-based Vaccines

Tumor Cell-based Vaccines

By Modality

Standalone Personalized Vaccines

Combination Therapies

By Application

Melanoma

Lung Cancer

Colorectal Cancer

Pancreatic Cancer

Prostate Cancer

Glioblastoma and Brain Tumors

By End-User

Hospitals and Specialized Oncology Centers

Ambulatory Care Centers

Academic and Research Institutes

Leading Companies in Personalized Cancer Vaccine Industry (2026)

BioNTech SE

Moderna, Inc.

CureVac AG

Gritstone Bio, Inc.

Sanofi (Translate Bio)

Arcturus Therapeutics

Candel Therapeutics

Elicio Therapeutics

Evaxion

Immunomic Therapeutics

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia, Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa, Other Africa

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Melanoma
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