

# Global Multispecific Antibodies Market - 2025 -2033

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## Abstracts

### Multispecific Antibodies Market Size

The global multispecific antibodies market size reached US\$ 12.61 Billion in 2024 from US\$ 10.19 billion in 2023 and is expected to reach US\$ 98.45 Billion by 2033, growing at a CAGR of 25.9% during the forecast period 2025-2033.

### Multispecific Antibodies Market Overview

The multispecific antibodies market is rapidly evolving as a transformative segment within the biopharmaceutical industry, driven by the growing need for innovative therapies that can simultaneously engage multiple targets. Unlike traditional monoclonal antibodies, multispecific antibodies are engineered to bind two or more antigens or epitopes, providing enhanced therapeutic efficacy, improved safety profiles, and the potential to overcome resistance mechanisms seen in complex diseases, especially cancer.

Companies that can navigate the technical complexities and safety challenges while delivering differentiated and cost-effective therapies will lead this dynamic market. The integration of multispecific antibodies into combination regimens and personalized treatment paradigms will further enhance their value proposition and adoption globally.

### Multispecific Antibodies Market Dynamics

#### Drivers:

Innovation in antibody engineering and platform technologies is significantly driving the multispecific antibodies market growth

The multispecific antibodies market's rapid expansion is largely fueled by breakthroughs in antibody engineering and innovative platform technologies that enable precise design, enhanced efficacy, and improved safety of multispecific formats. BiTE (Bispecific T-cell Engager) by Amgen is a pioneering platform that led to the approval of Blincyto (blinatumomab), the first bispecific antibody for cancer, targeting CD19 on B-cells and CD3 on T-cells. Blincyto's commercial success validates the platform's clinical and commercial potential.

DuoBody Technology by Genmab is a platform that allows efficient generation of bispecific antibodies with controlled assembly and superior stability. Products like Epcoritamab (CD3xCD20) are showing promising clinical results in non-Hodgkin lymphoma, with ongoing phase 3 trials expected to boost market uptake.

DART (Dual-Affinity Re-Targeting) by MacroGenics enables the generation of bispecifics with enhanced binding affinity and half-life. The platform's versatility is helping MacroGenics advance multiple candidates in oncology and immuno-oncology. These technologies accelerate development, expand therapeutic scope, and increase success rates, translating into market adoption and growth.

Expanding indications beyond oncology is also driving the multispecific antibodies market growth

While oncology remains the primary focus, multispecific antibodies are increasingly being developed for autoimmune diseases, infectious diseases, and rare genetic disorders. This expansion diversifies market opportunities, reducing dependence on oncology and tapping into large patient populations with unmet medical needs.

Multispecific antibodies targeting multiple immune checkpoints or inflammatory mediators can offer improved efficacy and safety profiles in diseases like rheumatoid arthritis, psoriasis, and multiple sclerosis. This area is expected to grow rapidly due to the chronic nature of these diseases and increasing prevalence globally.

Multispecific antibodies provide targeted approaches for diseases with complex pathophysiology involving multiple molecular pathways. For instance, bispecific antibodies targeting coagulation factors are being explored for hemophilia. These indications offer high-value niche markets with potential for premium pricing.

Restraints:

Competition from alternative therapeutic modalities is hampering the growth of the multispecific antibodies market

CAR-T (Chimeric Antigen Receptor T-cell) therapies have revolutionized cancer treatment by enabling patients' T-cells to directly target and kill tumor cells. Products like Kymriah (Novartis) and Yescarta (Gilead) have shown remarkable efficacy in hematologic cancers, capturing significant market share. The CAR-T therapies are creating stiff competition for multispecific antibodies, especially in oncology. CAR-T's potential for durable remission makes it a preferred option for some patients, limiting the adoption of multispecific antibodies.

ADCs combine monoclonal antibodies with potent cytotoxic drugs, delivering targeted killing of cancer cells. Approved ADCs like Kadcyra (Roche) and Enhertu (AstraZeneca) have gained widespread acceptance due to their efficacy and improved safety profiles. ADCs often compete with multispecific antibodies for similar indications, particularly in breast and hematologic cancers, posing a challenge for multispecific antibodies to differentiate and justify premium pricing.

Small-molecule kinase inhibitors remain cost-effective and widely used for various cancers. Immune checkpoint inhibitors dominate immuno-oncology with broad indications and clinical benefits. These therapies' established presence and reimbursement advantages limit multispecific antibodies' market penetration, especially where they are well-tolerated and effective.

Opportunities:

Emerging markets with growing healthcare infrastructure create a market opportunity for the multispecific antibodies market

Emerging economies such as China, India, Brazil, and Southeast Asian countries are heavily investing in modernizing healthcare infrastructure, building advanced hospitals, improving diagnostic capabilities, and expanding healthcare access. Improved infrastructure enables the adoption of complex biologics like multispecific antibodies, which require specialized handling and administration.

These regions are witnessing rapid increases in cancer incidence, autoimmune diseases, and infectious diseases due to aging populations, urbanization, and lifestyle changes. Government initiatives, insurance expansions, and patient assistance programs are improving affordability and access to advanced therapies. Pharmaceutical

companies are partnering with local firms to offer cost-effective distribution and localized manufacturing, enhancing market penetration.

Multinational companies like Amgen, Genmab, and Regeneron are collaborating with regional biotech firms and contract manufacturers to overcome regulatory and logistical challenges. Local production reduces costs and delivery times, making multispecific antibodies more accessible in emerging markets.

### Multispecific Antibodies Market, Segment Analysis

The global multispecific antibodies market is segmented based on type, therapeutic area, end-user, and region.

Oncology from the therapeutic area segment is expected to hold 63.42% of the market share in 2024 in the multispecific antibodies market

Cancer remains a leading cause of mortality worldwide, with complex tumor biology and resistance to standard therapies driving demand for innovative treatments. Multispecific antibodies can simultaneously target multiple tumor antigens or engage immune effector cells, offering superior efficacy over conventional monoclonal antibodies. This capability addresses tumor heterogeneity and immune evasion, critical challenges in oncology.

The majority of multispecific antibodies under clinical development or already approved are designed for oncology indications. Blinatumomab (Blinicyto) by Amgen, a bispecific T-cell engager targeting CD19 and CD3, was the first FDA-approved bispecific antibody for treating acute lymphoblastic leukemia (ALL). Genmab's Epcoritamab, a CD3xCD20 bispecific antibody, is in late-stage clinical trials for non-Hodgkin lymphoma with promising results. The oncology segment accounts for the largest share of the multispecific antibodies market, estimated at over 60-70% of market revenue in 2024.

### Multispecific Antibodies Market, Geographical Analysis

North America is expected to dominate the global multispecific antibodies market with a 47.94% share in 2024

North America, particularly the U.S., hosts leading biotechnology and pharmaceutical companies pioneering multispecific antibody research and development. Industry leaders like Amgen, Genmab, MacroGenics, Xencor, and Regeneron are based in or

have significant operations in the region, driving product innovation and commercialization through various clinical trials, which is driving the growth of the market in the region.

For instance, in June 2025, Genmab A/S announced new results from the Phase 1b/2 EPCORE NHL-2 trial Arm 10 (NCT04663347), evaluating epcoritamab, a T-cell engaging bispecific antibody administered subcutaneously, in combination with rituximab, ifosfamide, carboplatin, and etoposide (R-ICE) in adult patients with relapsed/refractory diffuse large B-cell lymphoma (R/R DLBCL) who are eligible for autologous stem cell transplantation (ASCT). Results demonstrated an overall response rate (ORR) of 87 percent, a complete response (CR) rate of 65 percent, and a partial response (PR) of 23 percent.

The U.S. reports high incidence rates of cancers, fueling demand for innovative multispecific antibody therapies. Early approvals of key multispecific antibodies, such as Blinatumomab (Amgen), have spurred clinical adoption and commercial success in North America.

Asia-Pacific is growing at the fastest pace in the multispecific antibodies market holding 18.04% of the market share

The Asia-Pacific region's fastest growth in the multispecific antibodies market is driven by increasing disease burden, expanding healthcare infrastructure, supportive regulatory reforms, and vibrant local biopharma innovation. These factors combine to create a dynamic market with accelerating adoption and development of multispecific antibody therapies. APAC is experiencing a sharp rise in cancer cases and autoimmune disorders due to population growth, aging demographics, and lifestyle changes. For instance, China and India together account for over 35% of global cancer cases, driving strong demand for advanced therapies like multispecific antibodies, which drives the market growth in the region.

### Multispecific Antibodies Market Competitive Landscape

Top companies in the multispecific antibodies market include Amgen Inc., AbbVie Inc., Akeso Biopharma Co., Ltd., AstraZeneca, Johnson & Johnson Services, Inc., Merck & Co., Inc., Regeneron Pharmaceuticals Inc., Genmab A/S, Xencor, and Merus, among others.

### Multispecific Antibodies Market, Key Developments

In May 2025, Invenra Inc. launched its T-Body trispecific antibody platform, a next-generation technology designed to reliably direct correct chain pairing and afford high expression and assembly efficiency in a variety of antibody constructs, including complex trispecific constructs. Building on the success of Invenra's B-Body bispecific platform, the T-Body platform expands the company's capabilities to address complex therapeutic targets with enhanced developability.

In December 2024, Invenra Inc. launched its Rapid Bispecific Antibody Discovery Services. Utilizing Invenra's B-Body Bispecific Platform, the streamlined service can identify bispecific antibody lead panel candidates in as little as four months. With these accelerated services, Invenra continues to build on its reputation for groundbreaking, client-focused discovery models. Recognizing the critical need for faster timelines in preclinical antibody discovery, the service is designed to meet the growing demand for expedited preclinical discovery on time-sensitive projects.

In October 2024, AbbVie and EvolveImmune Therapeutics announced a collaboration and option-to-license agreement to develop multispecific biologics for multiple targets in oncology. The discovery partnership will leverage EvolveImmune's T-cell engager platform to develop novel antibody-based therapies for solid and hematologic malignancies.

The global multispecific antibodies market report delivers a detailed analysis with 62 key tables, more than 55 visually impactful figures, and 165 pages of expert insights, providing a complete view of the market landscape.

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