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Contract Development Manufacturing Organization- Market Insights, Competitive Landscape and Market Forecast–2027

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Abstracts

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CDMO Market By Drug Type (Small Molecules And Biologics), By Service Type (Api And Finished Drug Product), By Form (Solids And Liquids), By Manufacturing (Clinical Manufacturing And Commercial Manufacturing), and by geography is estimated to advance at a healthy CAGR forecast till 2027 owing to rising prevalence of various diseases such as cancers and growing popularity of outsourcing in drug development process due to benefits in cost savings

Global CDMO market was valued at USD 100.02 billion in 2021, growing at a CAGR of 6.25% during the forecast period from 2022 to 2027, in order to reach USD 143.87 billion by 2027. Factors such as rising prevalence of various chronic and acute diseases leading to growing requirement of drugs, rising popularity of biologics as a treatment option are further expected to drive the demand for services offered by CDMOs as biologics being more complex than small molecules require elaborate facilities for product development. Moreover, owing to the advantages offered by CDMOs, a number of strategic partnerships have taken place to bolster the CDMO space.

CDMO Market Dynamics:

The rising prevalence of various diseases of different etiologies is one of the key growth driving factors of the CDMO market. For instance, the GLOBOCAN study conducted by the International Agency for Research on Cancer mentioned that in 2020, an estimated number of 19.3 million new cancer cases (18.1 million excluding non-melanoma skin cancer) and approximately 10.0 million cancer deaths were reported globally. The

source mentioned above also stated that in 2020, lung cancer was the main cause accounting for the highest number (1.4 million) of cases followed by prostate (14.1%), colorectum (10.6%), stomach (7.1%), and liver (6.3%) cancers. Furthermore, the rising number of cases of rare diseases is further expected to contribute in the growth of the CDMO market. According to World Economic Forum (February 2020), nearly 10% of the global population (475 million) people were affected by a rare condition. Drug development for rare diseases is not often undertaken by many pharmaceutical companies as the target population for such therapies is extremely limited. However, such diseases represent a high unmet medical need thereby motivating pharmaceutical companies in manufacturing orphan drugs. For instance, in December 2020, AGC Biologics, a CDMO, entered into a partnership with Laboratoire Pierre Fabre to manufacture ER-004, an intra-amniotic drug for a rare and debilitating genetic disorder- X-Linked Hypohidrotic Ectodermal Dysplasia. Thus, the growing need for drugs and therapies of various types due to rising prevalence of diseases is said to contribute to the growth of the global CDMO market during the forecast period (2022-2027).

Furthermore, the rise in strategic business activities such as mergers & acquisitions, collaborations and others among regional and global players for market expansion as well as maintaining their market position is another key factor responsible for market growth. For instance, in January 2021, Merck announced the acquisition of a Germany-based mRNA contract development and manufacturing organization (CDMO) AmpTec. This deal is expected to strengthen Merck’s capabilities in mRNA manufacturing. In another such development, in August 2019, Cambrex Corp was acquired by the private equity firm Permira Funds for USD 2.4 billion. Certain strategic business development activities were aimed at acquiring specific technologies. For instance, the acquisition of Brammer Bio byThermo Fisher Scientific for USD 1.7 billion and Paragon Bioservices by Catalent for USD 1.2 billion, as both the companies wanted to expand their capabilities in cell and gene therapies without having to invest in building facilities for such products from scratch. Therefore, the rising number of strategic business partnerships and company mergers and acquisitions are further expected to bolster the revenue growth in the CDMO market in upcoming years as well.

However, regulatory hurdles in gaining product approvals may be a restraining factor to the CDMO market growth.

Unlike majority of the markets, the CDMO market witnessed a positive trend during the COVID-19 pandemic. There was an exponential increase in the demand for vaccines across the globe. Many pharmaceutical companies were faced with different challenges

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such as procurement of raw materials to maintenance of supply chain as well as meeting the product demand across the globe. The pandemic paved the way for immense growth for the CDMO market as various pharmaceutical companies partnered with various CDMOs in order to meet the local demand. For instance, Moderna and Pfixer partnered with CDMOs such as Catalent and Lonza among others in order to scale up production as well as widen their product reach in developing countries. Therefore, the COVID-19 pandemic presented growth opportunities for the CDMO market ultimately creating an appreciable future outlook for the CDMO market during the forecast period from 2022-2027.

CDMO Market Segment Analysis:

CDMO Market by Drug Type (Small Molecules and Biologics), by Service Drug Type (API and Finished Drug Product), by Form (Solids and Liquids), by Manufacturing (Clinical Manufacturing and Commercial Manufacturing), and by Geography (North America, Europe, Asia-Pacific, and Rest of the World)

In the drug type segment of the CDMO market, the biologics category is accounted for a considerable revenue share in the CDMO market in 2021. This can be ascribed to the advantages associated with biologics over small molecule drugs. Biologics are considered to be highly target-specific thereby deliver better prognostic outcomes compared to small molecule drugs which are associated with severe side-effects due to non-specific activity. Moreover, biologic drugs offer an avenue for treatment of diseases that are difficult to treat and help fulfill clinical needs for diseases lying in special categories such as rare diseases. For instance, in May 2019, the US Food and Drug Administration (FDA) approved Zolgensma (onasemnogene abeparvovec-xioi), the first gene therapy for the treatment of children less than two years of age with spinal muscular atrophy (SMA), classified as the most severe form of spinal muscular atrophy and a leading genetic cause of infant mortality. Moreover, there are currently over 900 applications with the US Food and Drug Administration to investigate gene therapy in clinical trials.

Thus, with the rising popularity of biologics due to their target specificity and ability to offer treatment for various diseases such as cancers, rare diseases among others, this product category is estimated to register significant growth in revenue eventually driving the market growth during the forecast period.

Asia-Pacific is expected to register fastest growth in the CDMO Market:

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Among all the regions, Asia-Pacific (APAC) is projected to register significant growth in the global CDMO market in 2021. The significantly cheaper manufacturing costs as compared to North America and Europe and favorable laws in the region particularly China and India are the key factors responsible for the healthy growth in the CDMO market in the APAC region. Additional factors contributing in the growth of the CDMO market in the APAC region are the increased affordability of drugs owing to the rise of low-priced generics. This can be further coupled with the increase in the gross domestic product per capita of the countries in the region, supportive government programs that promote access to healthcare services leading to a better access to both doctors and pharmacies for large strata of the population.

One of the prominent factors driving the CDMO market is the growing pharmaceutical sector in the region. For instance, keeping the COVID-19 pandemic in mind, the Serum Institute of India agreed to manufacture one billion doses of COVID-19 vaccines of the Oxford and AstraZeneca. Additionally, as per the India Brand Equity Foundation, India is the largest provider of generic drugs across the globe. The source further mentioned that the Indian pharmaceutical sector is responsible for the supply of over 50% of global demand for various vaccines, 40% of demand for generic drugs in the US and 25% of all medicines in the UK. Along with the factors stated above, as mentioned in the Indian Economic Survey, the domestic pharmaceutical market in India is estimated to register three-fold growth in revenue in the next decade from 2021 to 2030. All these factors point towards the highly flourishing pharmaceutical sector in the country as well as the region.

In order to deal with the fierce competition in the pharmaceutical sector in terms of procuring advanced technologies, beating the competition in terms of product launch, and improving the cost of goods sold and improving the profit margins for the pharmaceutical companies, there has been quite a number of strategic partnerships taking place in the overall healthcare domain. This is evident by the growing strategic collaborations between the pharmaceutical companies and CDMOs. For instance, in April 2021, with the aim to expand their CDMO capabilities, Piramal Pharma spent USD 105 million in a straight-cash buyout of Hemmo Pharmaceuticals. This acquisition is expected to enhance the capability of Piramal Pharma in peptide manufacturing. In another development, in August 2021, Cipla Limited entered into a joint venture with Kemwell Biopharma Private Limited to develop, manufacture and commercialize biosimilars for global markets.

Thus, all the factors stated above are estimated to contribute in the growth of the Indian CDMO market leading to the overall growth of the APAC CDMO market.

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CDMO Market Key Players:

Some of the key market players operating in the CDMO market includes Patheon (Thermo Fisher Scientific), Catalent,Inc, Laboratoire Elaiapharm, The Lubrizol Corporation, Cambrex Corporation, Recipharm (EQT), Merck & Co., Inc, AGC Biologics, Nerpharma S.r.l, Pfizer CenterOne (Pfizer Inc), EMERGENT, Onyx Scientific Limited, Lonza, Siegfried Holding AG, CordenPharma International, FUJIFILM Diosynth Biotechnologies, Samsung Biologics, Delpharm, Center for Breakthrough Medicines, and WuXi Biologics and others.

Recent Developmental Activities in CDMO Market:

In February 2022, a China-based CDMO Asymchem Inc. plans to buy Snapdragon Chemistry, a US-based company focused on continuous manufacturing and early-stage chemical process development services for the total value of USD 57.94 million. This transaction is aimed at the expansion of the business of the Chinese CDMO in the US.

In February 2022, MilliporeSigma, the U.S. and Canada Life Science business sector of Merck KGaA closed the transaction marking the acquisition of Exelead for approximately USD 780 million in cash. This is expected to add to the capabilities of the LifeSciences business in becoming one the prominent CDMOs in the mRNA value chain.

In February 2021, EQT, a buyout group announced the acquisition of Recipharm through public takeover for USD 2.8 billion.

Key Takeaways from the CDMO Market Report Study

Market size analysis for current CDMO market size (2021), and market forecast for 5 years (2022-2027)

The effect of the COVID-19 pandemic on this market is significant. To capture and analyze suitable indicators, our experts are closely watching the CDMO market.

Top key product/services/technology developments, merger, acquisition,

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partnership, joint venture happened for last 3 years

Key companies dominating the global CDMO market.

Various opportunities available for the other competitors in the CDMO market space.

What are the top performing segments in 2021? How these segments will perform in 2027.

Which is the top-performing regions and countries in the current CDMO market scenario?

Which are the regions and countries where companies should have concentrated on opportunities for CDMO market growth in the coming future?

Target Audience who can be benefited from this CDMO Market Report Study

CDMO products providers

Research organizations and consulting companies

CDMO-related organizations, associations, forums, and other alliances

Government and corporate offices

Start-up companies, venture capitalists, and private equity firms

Distributors and traders dealing in CDMO services

Various end users who want to know more about the CDMO market and latest technological developments in the CDMO market.

Frequently Asked Questions for CDMO Market:

1. What are CDMOs?

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Contract Development and Manufacturing Organizations are entities that are involved in the drug development process starting from initial development to product manufacturing as well as packaging of the drugs providing end-to-end solutions to pharmaceutical companies.

2. What is the global market for CDMOs?

Global CDMO market was valued at USD 100.02 billion in 2021, growing at a CAGR of 6.25% during the forecast period from 2022 to 2027 to reach USD 143.87 billion by 2027.

3. What are the drivers for Global CDMO Market?

Factors such as rising prevalence of various diseases leading to growing requirement of drugs, rising popularity of biologics as a treatment option are further expected to drive the demand for services offered by CDMOs as biologics being more complex than small molecules require elaborate facilities for product development. Moreover, owing to the advantages offered by CDMOs, a number of strategic partnerships have taken place to bolster the CDMO space.

4. Who are the key players operating in Global CDMO Market?

Some of the key market players operating in the CDMO market includes Patheon (Thermo Fisher Scientific), Catalent,Inc, Laboratoire Elaiapharm, The Lubrizol Corporation, Cambrex Corporation, Recipharm (EQT), Merck & Co., Inc, AGC Biologics, Nerpharma S.r.l, Pfizer CenterOne (Pfizer Inc), EMERGENT, Onyx Scientific Limited, Lonza, Siegfried Holding AG, CordenPharma International, FUJIFILM Diosynth Biotechnologies, Samsung Biologics, Delpharm, Center for Breakthrough Medicines, and WuXi Biologics and others.

5. Which region would acquire significant market share in the CDMO Market?

Asia-Pacific is expected to hold a considerable revenue share in the CDMO market during the forecast period. The significantly cheaper manufacturing costs as compared to North America and Europe and favorable laws in the region particularly China and India are factors dominating the market for CDMO in the region. Additional factors contributing in the growth of the CDMO market in the APAC region are the increased affordability of drugs due to the rise of low-priced generics. This can be further coupled with the increase in the gross domestic product per capita of the countries in the region,

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supportive government programs that promote access to healthcare services leading to a better access to both doctors and pharmacies for large strata of the population.

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