

Global Biologics CMO (Contract Manufacturing Organization) Services Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Biologics CMO (Contract Manufacturing Organization) Services market size was valued at US\$ 28667 million in 2025 and is forecast to a readjusted size of US\$ 50955 million by 2032 with a CAGR of 8.5% during review period.

Biologics CMO (Contract Manufacturing Organization) Services refer to manufacturing services provided by contract manufacturing organizations under client agreements to biopharmaceutical companies, pharmaceutical companies, and other drug development organizations. These services primarily include biologic drug substance manufacturing, drug product manufacturing, aseptic fill-finish, and other GMP manufacturing activities. The service scope covers antibodies, vaccines, cell and gene therapies, and other biologics, and may support both clinical-stage and commercial-stage production. The market includes contract manufacturing services provided by independent third-party CMOs as well as external manufacturing services offered by in-house CMO business units of pharmaceutical and biopharmaceutical companies. Compared with CDMO services, CMO services are primarily focused on manufacturing execution and production capabilities and generally do not emphasize early-stage drug development, comprehensive process development, formulation development, or other R&D-intensive activities.

Biologics CMO (Contract Manufacturing Organization) services refer to GMP manufacturing services provided under contract to pharmaceutical companies, biotechnology companies, and other drug development organizations. These services primarily cover biologic drug substance (DS) manufacturing, drug product (DP) manufacturing, aseptic fill-finish, packaging, and related quality control activities. By

provider type, the industry includes both independent CMOs whose core business is third-party contract manufacturing and in-house CMO business units of large pharmaceutical and biopharmaceutical companies that provide manufacturing capacity to external customers. Compared with CDMOs, CMOs place greater emphasis on process execution following technology transfer, scale-up manufacturing, quality control, and reliable supply, while early-stage drug discovery, systematic process development, and formulation development are generally not their primary functions.

By product type, biologics CMO services mainly cover antibodies, vaccines, cell and gene therapies, and other biologics. Antibodies represent one of the more mature contract manufacturing segments and typically involve mammalian cell culture, harvest, chromatography purification, viral clearance, and drug substance preparation. Vaccine manufacturing involves a wider range of production platforms and process technologies. Cell and gene therapies generally feature smaller batch sizes, more complex processes, stringent quality requirements, and highly customized manufacturing workflows. Consequently, facility design, equipment configuration, biosafety requirements, and quality systems vary significantly across different biologic modalities.

By manufacturing stage, the industry can be divided into biologic drug substance manufacturing and biologic drug product manufacturing. Drug substance manufacturing is generally the more technology- and capital-intensive segment and includes cell culture or microbial fermentation, separation, purification, and bulk drug substance storage. Drug product manufacturing primarily covers formulation, aseptic filling, lyophilization, and filling into vials, prefilled syringes, or cartridges. Some large CMOs have established integrated DS-to-DP manufacturing networks, while other specialized providers focus on large-scale drug substance manufacturing or specific activities such as sterile fill-finish.

Direct customers primarily include large pharmaceutical and biopharmaceutical companies, small and mid-sized pharmaceutical and biotechnology companies, and other drug development organizations. Large pharmaceutical companies generally maintain internal manufacturing capabilities but may outsource production due to capacity constraints, new product introductions, regional supply requirements, specialized manufacturing needs, or efforts to reduce fixed-asset investment. Small and mid-sized biotechnology companies tend to rely more heavily on external manufacturing resources, with CMOs supporting clinical supply, scale-up, and commercial production.

Biologics CMO is an industry characterized by high capital, technical, and regulatory barriers. Mammalian cell culture is a core platform for antibodies and many recombinant

proteins. Commercial manufacturing commonly utilizes individual bioreactors ranging from approximately 2,000 L to 20,000 L, while large-scale commercial facilities typically combine multiple bioreactors into a production train. Effective annual capacity per production line depends on the number of bioreactors, culture cycle, product titer, batch success rate, and facility utilization. Single-use bioreactors offer shorter construction timelines, greater flexibility for product changeover, and lower cross-contamination risk, while large stainless-steel systems continue to provide significant economies of scale for mature, high-volume commercial products.

The upstream supply chain primarily consists of cell culture media, single-use bioprocess consumables, bioreactors, filtration systems, chromatography resins and columns, buffer materials, and sterile packaging components. Critical materials such as culture media, single-use consumables, and high-performance chromatography media can materially affect batch consistency and product quality. Major CMOs therefore typically establish multi-supplier strategies and safety stocks for critical materials while increasing facility utilization through standardized platform processes.

Regulatory compliance and quality systems constitute major competitive barriers. Biologics manufacturing must continuously comply with GMP requirements and maintain robust systems for quality management, data integrity, contamination control, process validation, and batch release. Once a commercial product has received regulatory approval and its manufacturing process has been validated at a specific CMO facility, transferring production to another site generally requires additional technology transfer, validation, and regulatory change procedures. The associated time and cost create relatively high customer stickiness and long contract durations for established commercial products.

Key competitive factors include commercial manufacturing experience, GMP compliance track record, manufacturing scale, capacity utilization, technology transfer efficiency, batch success rates, delivery reliability, and global manufacturing networks. Large CMOs with extensive bioreactor capacity and multiple manufacturing sites are well positioned to serve high-volume commercial antibody products, while mid-sized and specialized CMOs differentiate themselves through flexible capacity, small-batch manufacturing, complex molecule capabilities, or specialized technology platforms.

Profitability varies significantly depending on product type, manufacturing scale, capacity utilization, and development stage. Mature commercial biologics generally provide more stable batch demand and higher equipment utilization, whereas clinical-stage projects involve smaller batch volumes, frequent product changeovers, and

greater project attrition. Gross margins for established biologics CMO manufacturing operations can generally fall within approximately 20%–40%. Large-scale antibody drug substance manufacturing can achieve stronger economies of scale at high utilization rates, while cell and gene therapy manufacturing and small-batch sterile fill-finish may command higher unit pricing but also require greater labor, quality control, and facility costs.

Future industry growth will be supported by the continued expansion of biologics pipelines, increasing commercialization of antibody drugs and emerging biologic modalities, efforts by pharmaceutical companies to reduce fixed-asset investment, and deeper specialization across pharmaceutical manufacturing networks. At the same time, major CMOs continue to add large-scale 20,000 L-class mammalian cell culture capacity, resulting in greater capacity availability in certain regions. Competition is therefore expected to gradually shift from pure capacity expansion toward a broader focus on capacity utilization, manufacturing efficiency, quality consistency, supply reliability, and lifecycle manufacturing capabilities.

Report Scope

This report is a detailed and comprehensive analysis for global Biologics CMO (Contract Manufacturing Organization) Services market. Both quantitative and qualitative analyses are presented by company, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Biologics CMO (Contract Manufacturing Organization) Services market size and forecasts, in consumption value (\$ Million), 2021-2032

Global Biologics CMO (Contract Manufacturing Organization) Services market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global Biologics CMO (Contract Manufacturing Organization) Services market size and

forecasts, by Type and by Application, in consumption value (\$ Million), 2021-2032

Global Biologics CMO (Contract Manufacturing Organization) Services market shares of main players, in revenue (\$ Million), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Biologics CMO (Contract Manufacturing Organization) Services

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Biologics CMO (Contract Manufacturing Organization) Services market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Lonza Group AG, Samsung Biologics Co., Ltd., FUJIFILM Biotechnologies, Boehringer Ingelheim BioXcellence, WuXi Biologics (Cayman) Inc., Thermo Fisher Scientific – Patheon Pharma Services, Catalent, Inc., AGC Biologics, National Resilience, Inc., Vetter Pharma International GmbH, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Biologics CMO (Contract Manufacturing Organization) Services market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Type and by Application. This analysis can help you expand your business by targeting qualified niche markets.

Market segmentation

Market segment by Type

Cell and Gene Therapies

Antibodies

Vaccines

Others

Market segment by CMO Provider Type

In-house CMO

Independent CMO

Market segment by Manufacturing Stage

Drug Substance (DS) Manufacturing

Drug Product (DP) Manufacturing

Market segment by Application

Large Pharmaceutical and Biopharmaceutical Companies

Small and Mid-sized Pharmaceutical and Biotechnology Companies

Others

Market segment by players, this report covers

Lonza Group AG

Samsung Biologics Co., Ltd.

FUJIFILM Biotechnologies

Boehringer Ingelheim BioXcellence

WuXi Biologics (Cayman) Inc.

Thermo Fisher Scientific – Patheon Pharma Services

Catalent, Inc.

AGC Biologics

National Resilience, Inc.

Vetter Pharma International GmbH

Rentschler Biopharma SE

KBI Biopharma, Inc.

LOTTE BIOLOGICS Co., Ltd.

Pfizer CentreOne

AbbVie Contract Manufacturing

Syngene International Limited

Avid Bioservices, Inc.

Recipharm Advanced Bio

Ajinomoto Bio-Pharma Services

Wacker Biotech GmbH

Bora Biologics

3PBIOVIAN

Fareva

Aenova Group

Siegfried Holding AG

GenScript ProBio

Chime Biologics (Wuhan) Co., Ltd.

MabPlex International

Pharmaron Beijing Co., Ltd.

Thousand Oaks Biologics Inc.

Cytovance Biologics, Inc.

Porton Pharma Solutions Ltd.

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Biologics CMO (Contract Manufacturing Organization) Services product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Biologics CMO (Contract Manufacturing Organization) Services, with revenue, gross margin, and global market share of Biologics CMO (Contract Manufacturing Organization) Services from 2021 to 2026.

Chapter 3, the Biologics CMO (Contract Manufacturing Organization) Services competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Type and by Application, with consumption value and growth rate by Type, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and Biologics CMO (Contract Manufacturing Organization) Services market forecast, by regions, by Type and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Biologics CMO (Contract Manufacturing Organization) Services.

Chapter 13, to describe Biologics CMO (Contract Manufacturing Organization) Services research findings and conclusion.

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