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Global Therapeutic Bioconjugate CDMO Services Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Therapeutic Bioconjugate CDMO Services market size is expected to reach $ 4854 million by 2032, rising at a market growth of 14.3% CAGR during the forecast period (2026-2032).

Therapeutic Bioconjugate CDMO Services comprise outsourced research, development, and manufacturing activities that link biological molecules, such as antibodies, proteins, peptides, and oligonucleotides, with small-molecule drugs, nucleic acids, chelators, radionuclides, or other functional payloads. The service scope can extend from molecular design, linker and payload selection, conjugation feasibility studies, and process and analytical development to non-GMP, toxicology, clinical, and commercial cGMP drug-substance manufacturing, formulation development, sterile filling, lyophilization, stability studies, and regulatory support. Major modalities include antibody-drug conjugates, antibody-oligonucleotide conjugates, radionuclide drug conjugates, peptide and protein conjugates, dual-payload ADCs, bispecific ADCs, and other therapeutic bioconjugates. Key upstream inputs include monoclonal antibodies, recombinant proteins, peptides, oligonucleotides, linkers, payloads, linker-payload intermediates, chelators, radioactive precursors, cell-culture media, chromatography resins, ultrafiltration cassettes, single-use reactors, filtration components, solvents, buffers, pharmaceutical excipients, and filling consumables, while major downstream customers include multinational pharmaceutical companies, biotechnology companies, radiopharmaceutical developers, and specialty pharmaceutical companies. Based on contract service revenue, the industry's typical gross margin is approximately 30%?45%.

The global Therapeutic Bioconjugate CDMO Services market is shifting from fragmented outsourcing focused primarily on individual antibody-drug conjugate

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activities toward integrated service models covering biologic intermediates, linkers and payloads, conjugated drug substance, and sterile drug product. Therapeutic bioconjugate development combines large-molecule manufacturing, highly potent small-molecule chemistry, complex conjugation, advanced analytical characterization, and aseptic processing. When sponsors divide these activities among multiple providers, they face additional technology transfers, cross-border logistics, quality-agreement interfaces, scheduling complexity, and unclear responsibility boundaries. CDMOs capable of operating under a unified quality system and providing continuous support from development through commercial supply are therefore becoming more attractive. Competition is increasingly based on technology platforms, quality management, project execution, and supply-chain reliability rather than conjugation capacity alone.

Demand growth continues to be driven by expansion of antibody-drug conjugate pipelines, increasing commercial volumes of approved products, and higher outsourcing rates among pharmaceutical companies. At the same time, antibody-oligonucleotide conjugates, radionuclide drug conjugates, peptide and protein conjugates, dual-payload ADCs, bispecific ADCs, and other emerging modalities are broadening the addressable market. These products generally involve more complex molecular structures, tighter raw-material controls, and more demanding analytical characterization than conventional biologics. Standard antibody or small-molecule facilities often cannot complete all development and manufacturing activities independently. Future outsourcing demand is therefore expected to come not only from biotechnology companies with limited internal capacity, but also from large pharmaceutical companies seeking access to specialized conjugation technologies, clinical supply capabilities, and multi-region commercial capacity without committing substantial capital to dedicated facilities.

From a technology perspective, the industry is progressing from conventional stochastic lysine and cysteine conjugation toward more homogeneous approaches based on chemical site-specific conjugation, enzymatic conjugation, glycan remodeling, and non-natural amino acids. Site-specific technologies can improve drug-to-antibody ratio control, product consistency, stability, and therapeutic index, but they also increase complexity in raw-material characterization, process scale-up, intellectual-property licensing, and analytical-method development. CDMOs are expanding their technology portfolios through internal research, licensing, partnerships, and acquisitions while strengthening capabilities in high-resolution mass spectrometry, conjugation-site mapping, free-payload testing, aggregate analysis, residual-impurity control, and biological potency assays. Sponsors will increasingly evaluate whether a platform can move efficiently from candidate selection into a robust clinical and commercial process

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rather than simply whether the provider can perform an isolated conjugation reaction.

Industry expansion remains constrained by limited commercial capacity, high-potency material-handling risks, shortages of experienced personnel, complex technology transfers, and the absence of fully harmonized regulatory standards for emerging therapeutic bioconjugates. Many service providers are constructing or expanding conjugated drug-substance, high-potency chemistry, and sterile drug-product facilities, but new capacity requires customer qualification, process validation, and regulatory inspection before reaching stable utilization. High-quality commercial capacity may therefore remain relatively tight in the near term. Geopolitical uncertainty, supply-security requirements, and multi-region registration strategies are also encouraging sponsors to adopt dual-source or geographically diversified manufacturing models. Industry concentration is expected to rise gradually, with leading providers combining commercial track records, proprietary technologies, integrated capabilities, and global quality systems gaining share, while specialist CDMOs focused on early development, radionuclide conjugates, oligonucleotide conjugates, or unusual payloads retain opportunities in targeted segments.

This report studies the global Therapeutic Bioconjugate CDMO Services demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Therapeutic Bioconjugate CDMO Services, and provides market size (US$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Therapeutic Bioconjugate CDMO Services that contribute to its increasing demand across many markets.

Highlights and key features of the study
Global Therapeutic Bioconjugate CDMO Services total market, 2021-2032, (USD Million)
Global Therapeutic Bioconjugate CDMO Services total market by region & country, CAGR, 2021-2032, (USD Million)
U.S. VS China: Therapeutic Bioconjugate CDMO Services total market, key domestic companies, and share, (USD Million)
Global Therapeutic Bioconjugate CDMO Services revenue by player, revenue and market share 2021-2026, (USD Million)
Global Therapeutic Bioconjugate CDMO Services total market by Type, CAGR, 2021-2032, (USD Million)

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Global Therapeutic Bioconjugate CDMO Services total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Therapeutic Bioconjugate CDMO 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, WuXi XDC, Piramal Pharma, Sterling Pharma Solutions, Abzena, Axplora, Dishman Carbogen Amcis, Merck, Ajinomoto, Samsung Biologics, etc.

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

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Therapeutic Bioconjugate CDMO Services market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Therapeutic Bioconjugate CDMO Services Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

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Rest of World

Global Therapeutic Bioconjugate CDMO Services Market, Segmentation by Type:

Antibody-Drug Conjugates

Antibody-Oligonucleotide Conjugates

Radionuclide Drug Conjugates

Other

Global Therapeutic Bioconjugate CDMO Services Market, Segmentation by Development Stage:

Discovery and Feasibility

Process and Analytical Development

Clinical Manufacturing

Commercial Manufacturing

Global Therapeutic Bioconjugate CDMO Services Market, Segmentation by Therapeutic Area:

Oncology

Rare and Genetic Diseases

Autoimmune and Inflammatory Diseases

Ophthalmology and Other Specialty Diseases

Other

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Global Therapeutic Bioconjugate CDMO Services Market, Segmentation by Application:

Large Pharmaceutical Companies

Biotechnology Companies

Other

Companies Profiled:

Lonza

WuXi XDC

Piramal Pharma

Sterling Pharma Solutions

Abzena

Axplora

Dishman Carbogen Amcis

Merck

Ajinomoto

Samsung Biologics

LOTTE Biologics

BSP Pharmaceuticals

HAS Healthcare Advanced Synthesis

Cohance Lifesciences

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MabPlex

Porton Pharma Solutions

Asymchem

Formosa Laboratories

Key Questions Answered

1. How big is the global Therapeutic Bioconjugate CDMO Services market?
2. What is the demand of the global Therapeutic Bioconjugate CDMO Services market?
3. What is the year over year growth of the global Therapeutic Bioconjugate CDMO Services market?
4. What is the total value of the global Therapeutic Bioconjugate CDMO Services market?
5. Who are the Major Players in the global Therapeutic Bioconjugate CDMO Services market?
6. What are the growth factors driving the market demand?

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Contents

1 SUPPLY SUMMARY

1.1 Therapeutic Bioconjugate CDMO Services Introduction
1.2 World Therapeutic Bioconjugate CDMO Services Market Size & Forecast (2021 & 2025 & 2032)
1.3 World Therapeutic Bioconjugate CDMO Services Total Market by Region (by Headquarter Location)
  1.3.1 World Therapeutic Bioconjugate CDMO Services Market Size by Region (2021-2032), (by Headquarter Location)
  1.3.2 United States Based Company Therapeutic Bioconjugate CDMO Services Revenue (2021-2032)
  1.3.3 China Based Company Therapeutic Bioconjugate CDMO Services Revenue (2021-2032)
  1.3.4 Europe Based Company Therapeutic Bioconjugate CDMO Services Revenue (2021-2032)
  1.3.5 Japan Based Company Therapeutic Bioconjugate CDMO Services Revenue (2021-2032)
  1.3.6 South Korea Based Company Therapeutic Bioconjugate CDMO Services Revenue (2021-2032)
  1.3.7 ASEAN Based Company Therapeutic Bioconjugate CDMO Services Revenue (2021-2032)
  1.3.8 India Based Company Therapeutic Bioconjugate CDMO Services Revenue (2021-2032)
1.4 Market Drivers, Restraints and Trends
  1.4.1 Therapeutic Bioconjugate CDMO Services Market Drivers
  1.4.2 Factors Affecting Demand
  1.4.3 Major Market Trends

2 DEMAND SUMMARY

2.1 World Therapeutic Bioconjugate CDMO Services Consumption Value (2021-2032)
2.2 World Therapeutic Bioconjugate CDMO Services Consumption Value by Region
  2.2.1 World Therapeutic Bioconjugate CDMO Services Consumption Value by Region (2021-2026)
  2.2.2 World Therapeutic Bioconjugate CDMO Services Consumption Value Forecast by Region (2027-2032)
2.3 United States Therapeutic Bioconjugate CDMO Services Consumption Value

+357 96 030922
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(2021-2032)
2.4 China Therapeutic Bioconjugate CDMO Services Consumption Value (2021-2032)
2.5 Europe Therapeutic Bioconjugate CDMO Services Consumption Value (2021-2032)
2.6 Japan Therapeutic Bioconjugate CDMO Services Consumption Value (2021-2032)
2.7 South Korea Therapeutic Bioconjugate CDMO Services Consumption Value (2021-2032)
2.8 ASEAN Therapeutic Bioconjugate CDMO Services Consumption Value (2021-2032)
2.9 India Therapeutic Bioconjugate CDMO Services Consumption Value (2021-2032)

3 WORLD THERAPEUTIC BIOCONJUGATE CDMO SERVICES COMPANIES COMPETITIVE ANALYSIS

3.1 World Therapeutic Bioconjugate CDMO Services Revenue by Player (2021-2026)
3.2 Industry Rank and Concentration Rate (CR)
  3.2.1 Global Therapeutic Bioconjugate CDMO Services Industry Rank of Major Players
  3.2.2 Global Concentration Ratios (CR4) for Therapeutic Bioconjugate CDMO Services in 2025
  3.2.3 Global Concentration Ratios (CR8) for Therapeutic Bioconjugate CDMO Services in 2025
3.3 Therapeutic Bioconjugate CDMO Services Company Evaluation Quadrant
3.4 Therapeutic Bioconjugate CDMO Services Market: Overall Company Footprint Analysis
  3.4.1 Therapeutic Bioconjugate CDMO Services Market: Region Footprint
  3.4.2 Therapeutic Bioconjugate CDMO Services Market: Company Product Type Footprint
  3.4.3 Therapeutic Bioconjugate CDMO Services Market: Company Product Application Footprint
3.5 Competitive Environment
  3.5.1 Historical Structure of the Industry
  3.5.2 Barriers of Market Entry
  3.5.3 Factors of Competition
3.6 Mergers & Acquisitions Activity

4 UNITED STATES VS CHINA VS REST OF WORLD (BY HEADQUARTER LOCATION)

4.1 United States VS China: Therapeutic Bioconjugate CDMO Services Revenue Comparison (by Headquarter Location)
  4.1.1 United States VS China: Therapeutic Bioconjugate CDMO Services Revenue

+357 96 030922
info@marketpublishers.com

Comparison (2021 & 2025 & 2032) (by Headquarter Location)
4.1.2 United States VS China: Therapeutic Bioconjugate CDMO Services Revenue Market Share Comparison (2021 & 2025 & 2032)
4.2 United States Based Companies VS China Based Companies: Therapeutic Bioconjugate CDMO Services Consumption Value Comparison
4.2.1 United States VS China: Therapeutic Bioconjugate CDMO Services Consumption Value Comparison (2021 & 2025 & 2032)
4.2.2 United States VS China: Therapeutic Bioconjugate CDMO Services Consumption Value Market Share Comparison (2021 & 2025 & 2032)
4.3 United States Based Therapeutic Bioconjugate CDMO Services Companies and Market Share, 2021-2026
4.3.1 United States Based Therapeutic Bioconjugate CDMO Services Companies, Headquarters (States, Country)
4.3.2 United States Based Companies Therapeutic Bioconjugate CDMO Services Revenue, (2021-2026)
4.4 China Based Companies Therapeutic Bioconjugate CDMO Services Revenue and Market Share, 2021-2026
4.4.1 China Based Therapeutic Bioconjugate CDMO Services Companies, Company Headquarters (Province, Country)
4.4.2 China Based Companies Therapeutic Bioconjugate CDMO Services Revenue, (2021-2026)
4.5 Rest of World Based Therapeutic Bioconjugate CDMO Services Companies and Market Share, 2021-2026
4.5.1 Rest of World Based Therapeutic Bioconjugate CDMO Services Companies, Headquarters (Province, Country)
4.5.2 Rest of World Based Companies Therapeutic Bioconjugate CDMO Services Revenue (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Therapeutic Bioconjugate CDMO Services Market Size Overview by Type: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Type
5.2.1 Antibody-Drug Conjugates
5.2.2 Antibody-Oligonucleotide Conjugates
5.2.3 Radionuclide Drug Conjugates
5.2.4 Other
5.3 Market Segment by Type
5.3.1 World Therapeutic Bioconjugate CDMO Services Market Size by Type

+357 96 030922
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(2021-2026)
5.3.2 World Therapeutic Bioconjugate CDMO Services Market Size by Type (2027-2032)
5.3.3 World Therapeutic Bioconjugate CDMO Services Market Size Market Share by Type (2027-2032)

6 MARKET ANALYSIS BY DEVELOPMENT STAGE

6.1 World Therapeutic Bioconjugate CDMO Services Market Size Overview by Development Stage: 2021 VS 2025 VS 2032
6.2 Segment Introduction by Development Stage
6.2.1 Discovery and Feasibility
6.2.2 Process and Analytical Development
6.2.3 Clinical Manufacturing
6.2.4 Commercial Manufacturing
6.3 Market Segment by Development Stage
6.3.1 World Therapeutic Bioconjugate CDMO Services Market Size by Development Stage (2021-2026)
6.3.2 World Therapeutic Bioconjugate CDMO Services Market Size by Development Stage (2027-2032)
6.3.3 World Therapeutic Bioconjugate CDMO Services Market Size Market Share by Development Stage (2027-2032)

7 MARKET ANALYSIS BY THERAPEUTIC AREA

7.1 World Therapeutic Bioconjugate CDMO Services Market Size Overview by Therapeutic Area: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Therapeutic Area
7.2.1 Oncology
7.2.2 Rare and Genetic Diseases
7.2.3 Autoimmune and Inflammatory Diseases
7.2.4 Ophthalmology and Other Specialty Diseases
7.2.5 Other
7.3 Market Segment by Therapeutic Area
7.3.1 World Therapeutic Bioconjugate CDMO Services Market Size by Therapeutic Area (2021-2026)
7.3.2 World Therapeutic Bioconjugate CDMO Services Market Size by Therapeutic Area (2027-2032)
7.3.3 World Therapeutic Bioconjugate CDMO Services Market Size Market Share by

+357 96 030922
info@marketpublishers.com

Therapeutic Area (2027-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Therapeutic Bioconjugate CDMO Services Market Size Overview by Application: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Application
  8.2.1 Large Pharmaceutical Companies
  8.2.2 Biotechnology Companies
  8.2.3 Other
8.3 Market Segment by Application
  8.3.1 World Therapeutic Bioconjugate CDMO Services Market Size by Application (2021-2026)
  8.3.2 World Therapeutic Bioconjugate CDMO Services Market Size by Application (2027-2032)
  8.3.3 World Therapeutic Bioconjugate CDMO Services Market Size Market Share by Application (2021-2032)

9 COMPANY PROFILES

9.1 Lonza
  9.1.1 Lonza Details
  9.1.2 Lonza Major Business
  9.1.3 Lonza Therapeutic Bioconjugate CDMO Services Product and Services
  9.1.4 Lonza Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026)
  9.1.5 Lonza Recent Developments/Updates
  9.1.6 Lonza Competitive Strengths & Weaknesses
9.2 WuXi XDC
  9.2.1 WuXi XDC Details
  9.2.2 WuXi XDC Major Business
  9.2.3 WuXi XDC Therapeutic Bioconjugate CDMO Services Product and Services
  9.2.4 WuXi XDC Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026)
  9.2.5 WuXi XDC Recent Developments/Updates
  9.2.6 WuXi XDC Competitive Strengths & Weaknesses
9.3 Piramal Pharma
  9.3.1 Piramal Pharma Details
  9.3.2 Piramal Pharma Major Business

+357 96 030922
info@marketpublishers.com

9.3.3 Piramal Pharma Therapeutic Bioconjugate CDMO Services Product and Services
9.3.4 Piramal Pharma Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026)
9.3.5 Piramal Pharma Recent Developments/Updates
9.3.6 Piramal Pharma Competitive Strengths & Weaknesses
9.4 Sterling Pharma Solutions
9.4.1 Sterling Pharma Solutions Details
9.4.2 Sterling Pharma Solutions Major Business
9.4.3 Sterling Pharma Solutions Therapeutic Bioconjugate CDMO Services Product and Services
9.4.4 Sterling Pharma Solutions Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026)
9.4.5 Sterling Pharma Solutions Recent Developments/Updates
9.4.6 Sterling Pharma Solutions Competitive Strengths & Weaknesses
9.5 Abzena
9.5.1 Abzena Details
9.5.2 Abzena Major Business
9.5.3 Abzena Therapeutic Bioconjugate CDMO Services Product and Services
9.5.4 Abzena Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026)
9.5.5 Abzena Recent Developments/Updates
9.5.6 Abzena Competitive Strengths & Weaknesses
9.6 Axplora
9.6.1 Axplora Details
9.6.2 Axplora Major Business
9.6.3 Axplora Therapeutic Bioconjugate CDMO Services Product and Services
9.6.4 Axplora Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026)
9.6.5 Axplora Recent Developments/Updates
9.6.6 Axplora Competitive Strengths & Weaknesses
9.7 Dishman Carbogen Amcis
9.7.1 Dishman Carbogen Amcis Details
9.7.2 Dishman Carbogen Amcis Major Business
9.7.3 Dishman Carbogen Amcis Therapeutic Bioconjugate CDMO Services Product and Services
9.7.4 Dishman Carbogen Amcis Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026)
9.7.5 Dishman Carbogen Amcis Recent Developments/Updates

+357 96 030922
info@marketpublishers.com

9.7.6 Dishman Carbogen Amcis Competitive Strengths & Weaknesses
9.8 Merck
9.8.1 Merck Details
9.8.2 Merck Major Business
9.8.3 Merck Therapeutic Bioconjugate CDMO Services Product and Services
9.8.4 Merck Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026)
9.8.5 Merck Recent Developments/Updates
9.8.6 Merck Competitive Strengths & Weaknesses
9.9 Ajinomoto
9.9.1 Ajinomoto Details
9.9.2 Ajinomoto Major Business
9.9.3 Ajinomoto Therapeutic Bioconjugate CDMO Services Product and Services
9.9.4 Ajinomoto Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026)
9.9.5 Ajinomoto Recent Developments/Updates
9.9.6 Ajinomoto Competitive Strengths & Weaknesses
9.10 Samsung Biologics
9.10.1 Samsung Biologics Details
9.10.2 Samsung Biologics Major Business
9.10.3 Samsung Biologics Therapeutic Bioconjugate CDMO Services Product and Services
9.10.4 Samsung Biologics Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026)
9.10.5 Samsung Biologics Recent Developments/Updates
9.10.6 Samsung Biologics Competitive Strengths & Weaknesses
9.11 LOTTE Biologics
9.11.1 LOTTE Biologics Details
9.11.2 LOTTE Biologics Major Business
9.11.3 LOTTE Biologics Therapeutic Bioconjugate CDMO Services Product and Services
9.11.4 LOTTE Biologics Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026)
9.11.5 LOTTE Biologics Recent Developments/Updates
9.11.6 LOTTE Biologics Competitive Strengths & Weaknesses
9.12 BSP Pharmaceuticals
9.12.1 BSP Pharmaceuticals Details
9.12.2 BSP Pharmaceuticals Major Business
9.12.3 BSP Pharmaceuticals Therapeutic Bioconjugate CDMO Services Product and

+357 96 030922
info@marketpublishers.com

Services
9.12.4 BSP Pharmaceuticals Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026)
9.12.5 BSP Pharmaceuticals Recent Developments/Updates
9.12.6 BSP Pharmaceuticals Competitive Strengths & Weaknesses
9.13 HAS Healthcare Advanced Synthesis
9.13.1 HAS Healthcare Advanced Synthesis Details
9.13.2 HAS Healthcare Advanced Synthesis Major Business
9.13.3 HAS Healthcare Advanced Synthesis Therapeutic Bioconjugate CDMO Services Product and Services
9.13.4 HAS Healthcare Advanced Synthesis Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026)
9.13.5 HAS Healthcare Advanced Synthesis Recent Developments/Updates
9.13.6 HAS Healthcare Advanced Synthesis Competitive Strengths & Weaknesses
9.14 Cohance Lifesciences
9.14.1 Cohance Lifesciences Details
9.14.2 Cohance Lifesciences Major Business
9.14.3 Cohance Lifesciences Therapeutic Bioconjugate CDMO Services Product and Services
9.14.4 Cohance Lifesciences Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026)
9.14.5 Cohance Lifesciences Recent Developments/Updates
9.14.6 Cohance Lifesciences Competitive Strengths & Weaknesses
9.15 MabPlex
9.15.1 MabPlex Details
9.15.2 MabPlex Major Business
9.15.3 MabPlex Therapeutic Bioconjugate CDMO Services Product and Services
9.15.4 MabPlex Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026)
9.15.5 MabPlex Recent Developments/Updates
9.15.6 MabPlex Competitive Strengths & Weaknesses
9.16 Porton Pharma Solutions
9.16.1 Porton Pharma Solutions Details
9.16.2 Porton Pharma Solutions Major Business
9.16.3 Porton Pharma Solutions Therapeutic Bioconjugate CDMO Services Product and Services
9.16.4 Porton Pharma Solutions Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026)
9.16.5 Porton Pharma Solutions Recent Developments/Updates

+357 96 030922
info@marketpublishers.com

9.16.6 Porton Pharma Solutions Competitive Strengths & Weaknesses
9.17 Asymchem
9.17.1 Asymchem Details
9.17.2 Asymchem Major Business
9.17.3 Asymchem Therapeutic Bioconjugate CDMO Services Product and Services
9.17.4 Asymchem Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026)
9.17.5 Asymchem Recent Developments/Updates
9.17.6 Asymchem Competitive Strengths & Weaknesses
9.18 Formosa Laboratories
9.18.1 Formosa Laboratories Details
9.18.2 Formosa Laboratories Major Business
9.18.3 Formosa Laboratories Therapeutic Bioconjugate CDMO Services Product and Services
9.18.4 Formosa Laboratories Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026)
9.18.5 Formosa Laboratories Recent Developments/Updates
9.18.6 Formosa Laboratories Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Therapeutic Bioconjugate CDMO Services Industry Chain
10.2 Therapeutic Bioconjugate CDMO Services Upstream Analysis
10.3 Therapeutic Bioconjugate CDMO Services Midstream Analysis
10.4 Therapeutic Bioconjugate CDMO Services Downstream Analysis

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology
12.2 Research Process and Data Source
12.3 Disclaimer

+357 96 030922
info@marketpublishers.com

List Of Tables

LIST OF TABLES

Table 1. World Therapeutic Bioconjugate CDMO Services Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)
Table 2. World Therapeutic Bioconjugate CDMO Services Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)
Table 3. World Therapeutic Bioconjugate CDMO Services Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)
Table 4. World Therapeutic Bioconjugate CDMO Services Revenue Market Share by Region (2021-2026), (by Headquarter Location)
Table 5. World Therapeutic Bioconjugate CDMO Services Revenue Market Share by Region (2027-2032), (by Headquarter Location)
Table 6. Major Market Trends
Table 7. World Therapeutic Bioconjugate CDMO Services Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)
Table 8. World Therapeutic Bioconjugate CDMO Services Consumption Value by Region (2021-2026) & (USD Million)
Table 9. World Therapeutic Bioconjugate CDMO Services Consumption Value Forecast by Region (2027-2032) & (USD Million)
Table 10. World Therapeutic Bioconjugate CDMO Services Revenue by Player (2021-2026) & (USD Million)
Table 11. Revenue Market Share of Key Therapeutic Bioconjugate CDMO Services Players in 2025
Table 12. World Therapeutic Bioconjugate CDMO Services Industry Rank of Major Player, Based on Revenue in 2025
Table 13. Global Therapeutic Bioconjugate CDMO Services Company Evaluation Quadrant
Table 14. Head Office of Key Therapeutic Bioconjugate CDMO Services Players
Table 15. Therapeutic Bioconjugate CDMO Services Market: Company Product Type Footprint
Table 16. Therapeutic Bioconjugate CDMO Services Market: Company Product Application Footprint
Table 17. Therapeutic Bioconjugate CDMO Services Mergers & Acquisitions Activity
Table 18. United States VS China Therapeutic Bioconjugate CDMO Services Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 19. United States VS China Therapeutic Bioconjugate CDMO Services Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)

+357 96 030922
info@marketpublishers.com

Table 20. United States Based Therapeutic Bioconjugate CDMO Services Companies, Headquarters (States, Country)
Table 21. United States Based Companies Therapeutic Bioconjugate CDMO Services Revenue, (2021-2026) & (USD Million)
Table 22. United States Based Companies Therapeutic Bioconjugate CDMO Services Revenue Market Share (2021-2026)
Table 23. China Based Therapeutic Bioconjugate CDMO Services Companies, Headquarters (Province, Country)
Table 24. China Based Companies Therapeutic Bioconjugate CDMO Services Revenue, (2021-2026) & (USD Million)
Table 25. China Based Companies Therapeutic Bioconjugate CDMO Services Revenue Market Share (2021-2026)
Table 26. Rest of World Based Therapeutic Bioconjugate CDMO Services Companies, Headquarters (Province, Country)
Table 27. Rest of World Based Companies Therapeutic Bioconjugate CDMO Services Revenue (2021-2026) & (USD Million)
Table 28. Rest of World Based Companies Therapeutic Bioconjugate CDMO Services Revenue Market Share (2021-2026)
Table 29. World Therapeutic Bioconjugate CDMO Services Market Size by Type, (USD Million), 2021 & 2025 & 2032
Table 30. World Therapeutic Bioconjugate CDMO Services Market Size Value by Type (2021-2026) & (USD Million)
Table 31. World Therapeutic Bioconjugate CDMO Services Market Size by Type (2027-2032) & (USD Million)
Table 32. World Therapeutic Bioconjugate CDMO Services Market Size by Development Stage, (USD Million), 2021 & 2025 & 2032
Table 33. World Therapeutic Bioconjugate CDMO Services Market Size Value by Development Stage (2021-2026) & (USD Million)
Table 34. World Therapeutic Bioconjugate CDMO Services Market Size by Development Stage (2027-2032) & (USD Million)
Table 35. World Therapeutic Bioconjugate CDMO Services Market Size by Therapeutic Area, (USD Million), 2021 & 2025 & 2032
Table 36. World Therapeutic Bioconjugate CDMO Services Market Size Value by Therapeutic Area (2021-2026) & (USD Million)
Table 37. World Therapeutic Bioconjugate CDMO Services Market Size by Therapeutic Area (2027-2032) & (USD Million)
Table 38. World Therapeutic Bioconjugate CDMO Services Market Size by Application, (USD Million), 2021 & 2025 & 2032
Table 39. World Therapeutic Bioconjugate CDMO Services Market Size by Application

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(2021-2026) & (USD Million)
Table 40. World Therapeutic Bioconjugate CDMO Services Market Size by Application (2027-2032) & (USD Million)
Table 41. Lonza Basic Information, Manufacturing Base and Competitors
Table 42. Lonza Major Business
Table 43. Lonza Therapeutic Bioconjugate CDMO Services Product and Services
Table 44. Lonza Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 45. Lonza Recent Developments/Updates
Table 46. Lonza Competitive Strengths & Weaknesses
Table 47. WuXi XDC Basic Information, Manufacturing Base and Competitors
Table 48. WuXi XDC Major Business
Table 49. WuXi XDC Therapeutic Bioconjugate CDMO Services Product and Services
Table 50. WuXi XDC Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 51. WuXi XDC Recent Developments/Updates
Table 52. WuXi XDC Competitive Strengths & Weaknesses
Table 53. Piramal Pharma Basic Information, Manufacturing Base and Competitors
Table 54. Piramal Pharma Major Business
Table 55. Piramal Pharma Therapeutic Bioconjugate CDMO Services Product and Services
Table 56. Piramal Pharma Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 57. Piramal Pharma Recent Developments/Updates
Table 58. Piramal Pharma Competitive Strengths & Weaknesses
Table 59. Sterling Pharma Solutions Basic Information, Manufacturing Base and Competitors
Table 60. Sterling Pharma Solutions Major Business
Table 61. Sterling Pharma Solutions Therapeutic Bioconjugate CDMO Services Product and Services
Table 62. Sterling Pharma Solutions Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 63. Sterling Pharma Solutions Recent Developments/Updates
Table 64. Sterling Pharma Solutions Competitive Strengths & Weaknesses
Table 65. Abzena Basic Information, Manufacturing Base and Competitors
Table 66. Abzena Major Business
Table 67. Abzena Therapeutic Bioconjugate CDMO Services Product and Services
Table 68. Abzena Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

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Table 69. Abzena Recent Developments/Updates
Table 70. Abzena Competitive Strengths & Weaknesses
Table 71. Axplora Basic Information, Manufacturing Base and Competitors
Table 72. Axplora Major Business
Table 73. Axplora Therapeutic Bioconjugate CDMO Services Product and Services
Table 74. Axplora Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 75. Axplora Recent Developments/Updates
Table 76. Axplora Competitive Strengths & Weaknesses
Table 77. Dishman Carbogen Amcis Basic Information, Manufacturing Base and Competitors
Table 78. Dishman Carbogen Amcis Major Business
Table 79. Dishman Carbogen Amcis Therapeutic Bioconjugate CDMO Services Product and Services
Table 80. Dishman Carbogen Amcis Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 81. Dishman Carbogen Amcis Recent Developments/Updates
Table 82. Dishman Carbogen Amcis Competitive Strengths & Weaknesses
Table 83. Merck Basic Information, Manufacturing Base and Competitors
Table 84. Merck Major Business
Table 85. Merck Therapeutic Bioconjugate CDMO Services Product and Services
Table 86. Merck Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 87. Merck Recent Developments/Updates
Table 88. Merck Competitive Strengths & Weaknesses
Table 89. Ajinomoto Basic Information, Manufacturing Base and Competitors
Table 90. Ajinomoto Major Business
Table 91. Ajinomoto Therapeutic Bioconjugate CDMO Services Product and Services
Table 92. Ajinomoto Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 93. Ajinomoto Recent Developments/Updates
Table 94. Ajinomoto Competitive Strengths & Weaknesses
Table 95. Samsung Biologics Basic Information, Manufacturing Base and Competitors
Table 96. Samsung Biologics Major Business
Table 97. Samsung Biologics Therapeutic Bioconjugate CDMO Services Product and Services
Table 98. Samsung Biologics Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 99. Samsung Biologics Recent Developments/Updates

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Table 100. Samsung Biologics Competitive Strengths & Weaknesses
Table 101. LOTTE Biologics Basic Information, Manufacturing Base and Competitors
Table 102. LOTTE Biologics Major Business
Table 103. LOTTE Biologics Therapeutic Bioconjugate CDMO Services Product and Services
Table 104. LOTTE Biologics Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 105. LOTTE Biologics Recent Developments/Updates
Table 106. LOTTE Biologics Competitive Strengths & Weaknesses
Table 107. BSP Pharmaceuticals Basic Information, Manufacturing Base and Competitors
Table 108. BSP Pharmaceuticals Major Business
Table 109. BSP Pharmaceuticals Therapeutic Bioconjugate CDMO Services Product and Services
Table 110. BSP Pharmaceuticals Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 111. BSP Pharmaceuticals Recent Developments/Updates
Table 112. BSP Pharmaceuticals Competitive Strengths & Weaknesses
Table 113. HAS Healthcare Advanced Synthesis Basic Information, Manufacturing Base and Competitors
Table 114. HAS Healthcare Advanced Synthesis Major Business
Table 115. HAS Healthcare Advanced Synthesis Therapeutic Bioconjugate CDMO Services Product and Services
Table 116. HAS Healthcare Advanced Synthesis Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 117. HAS Healthcare Advanced Synthesis Recent Developments/Updates
Table 118. HAS Healthcare Advanced Synthesis Competitive Strengths & Weaknesses
Table 119. Cohance Lifesciences Basic Information, Manufacturing Base and Competitors
Table 120. Cohance Lifesciences Major Business
Table 121. Cohance Lifesciences Therapeutic Bioconjugate CDMO Services Product and Services
Table 122. Cohance Lifesciences Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 123. Cohance Lifesciences Recent Developments/Updates
Table 124. Cohance Lifesciences Competitive Strengths & Weaknesses
Table 125. MabPlex Basic Information, Manufacturing Base and Competitors
Table 126. MabPlex Major Business
Table 127. MabPlex Therapeutic Bioconjugate CDMO Services Product and Services

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Table 128. MabPlex Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 129. MabPlex Recent Developments/Updates
Table 130. MabPlex Competitive Strengths & Weaknesses
Table 131. Porton Pharma Solutions Basic Information, Manufacturing Base and Competitors
Table 132. Porton Pharma Solutions Major Business
Table 133. Porton Pharma Solutions Therapeutic Bioconjugate CDMO Services Product and Services
Table 134. Porton Pharma Solutions Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 135. Porton Pharma Solutions Recent Developments/Updates
Table 136. Porton Pharma Solutions Competitive Strengths & Weaknesses
Table 137. Asymchem Basic Information, Manufacturing Base and Competitors
Table 138. Asymchem Major Business
Table 139. Asymchem Therapeutic Bioconjugate CDMO Services Product and Services
Table 140. Asymchem Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 141. Asymchem Recent Developments/Updates
Table 142. Asymchem Competitive Strengths & Weaknesses
Table 143. Formosa Laboratories Basic Information, Manufacturing Base and Competitors
Table 144. Formosa Laboratories Major Business
Table 145. Formosa Laboratories Therapeutic Bioconjugate CDMO Services Product and Services
Table 146. Formosa Laboratories Therapeutic Bioconjugate CDMO Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 147. Formosa Laboratories Recent Developments/Updates
Table 148. Formosa Laboratories Competitive Strengths & Weaknesses
Table 149. Global Key Players of Therapeutic Bioconjugate CDMO Services Upstream (Raw Materials)
Table 150. Global Therapeutic Bioconjugate CDMO Services Typical Customers

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List Of Figures

LIST OF FIGURES

Figure 1. Therapeutic Bioconjugate CDMO Services Picture
Figure 2. World Therapeutic Bioconjugate CDMO Services Total Revenue: 2021 & 2025 & 2032, (USD Million)
Figure 3. World Therapeutic Bioconjugate CDMO Services Total Revenue (2021-2032) & (USD Million)
Figure 4. World Therapeutic Bioconjugate CDMO Services Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)
Figure 5. World Therapeutic Bioconjugate CDMO Services Revenue Market Share by Region (2021-2032), (by Headquarter Location)
Figure 6. United States Based Company Therapeutic Bioconjugate CDMO Services Revenue (2021-2032) & (USD Million)
Figure 7. China Based Company Therapeutic Bioconjugate CDMO Services Revenue (2021-2032) & (USD Million)
Figure 8. Europe Based Company Therapeutic Bioconjugate CDMO Services Revenue (2021-2032) & (USD Million)
Figure 9. Japan Based Company Therapeutic Bioconjugate CDMO Services Revenue (2021-2032) & (USD Million)
Figure 10. South Korea Based Company Therapeutic Bioconjugate CDMO Services Revenue (2021-2032) & (USD Million)
Figure 11. ASEAN Based Company Therapeutic Bioconjugate CDMO Services Revenue (2021-2032) & (USD Million)
Figure 12. India Based Company Therapeutic Bioconjugate CDMO Services Revenue (2021-2032) & (USD Million)
Figure 13. Therapeutic Bioconjugate CDMO Services Market Drivers
Figure 14. Factors Affecting Demand
Figure 15. World Therapeutic Bioconjugate CDMO Services Consumption Value (2021-2032) & (USD Million)
Figure 16. World Therapeutic Bioconjugate CDMO Services Consumption Value Market Share by Region (2021-2032)
Figure 17. United States Therapeutic Bioconjugate CDMO Services Consumption Value (2021-2032) & (USD Million)
Figure 18. China Therapeutic Bioconjugate CDMO Services Consumption Value (2021-2032) & (USD Million)
Figure 19. Europe Therapeutic Bioconjugate CDMO Services Consumption Value (2021-2032) & (USD Million)

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Figure 20. Japan Therapeutic Bioconjugate CDMO Services Consumption Value (2021-2032) & (USD Million)
Figure 21. South Korea Therapeutic Bioconjugate CDMO Services Consumption Value (2021-2032) & (USD Million)
Figure 22. ASEAN Therapeutic Bioconjugate CDMO Services Consumption Value (2021-2032) & (USD Million)
Figure 23. India Therapeutic Bioconjugate CDMO Services Consumption Value (2021-2032) & (USD Million)
Figure 24. Producer Shipments of Therapeutic Bioconjugate CDMO Services by Player Revenue ($MM) and Market Share (%): 2025
Figure 25. Global Four-firm Concentration Ratios (CR4) for Therapeutic Bioconjugate CDMO Services Markets in 2025
Figure 26. Global Four-firm Concentration Ratios (CR8) for Therapeutic Bioconjugate CDMO Services Markets in 2025
Figure 27. United States VS China: Therapeutic Bioconjugate CDMO Services Revenue Market Share Comparison (2021 & 2025 & 2032)
Figure 28. United States VS China: Therapeutic Bioconjugate CDMO Services Consumption Value Market Share Comparison (2021 & 2025 & 2032)
Figure 29. World Therapeutic Bioconjugate CDMO Services Market Size by Type, (USD Million), 2021 & 2025 & 2032
Figure 30. World Therapeutic Bioconjugate CDMO Services Market Size Market Share by Type in 2025
Figure 31. Antibody-Drug Conjugates
Figure 32. Antibody-Oligonucleotide Conjugates
Figure 33. Radionuclide Drug Conjugates
Figure 34. Other
Figure 35. World Therapeutic Bioconjugate CDMO Services Market Size Market Share by Type (2021-2032)
Figure 36. World Therapeutic Bioconjugate CDMO Services Market Size by Development Stage, (USD Million), 2021 & 2025 & 2032
Figure 37. World Therapeutic Bioconjugate CDMO Services Market Size Market Share by Development Stage in 2025
Figure 38. Discovery and Feasibility
Figure 39. Process and Analytical Development
Figure 40. Clinical Manufacturing
Figure 41. Commercial Manufacturing
Figure 42. World Therapeutic Bioconjugate CDMO Services Market Size Market Share by Development Stage (2021-2032)
Figure 43. World Therapeutic Bioconjugate CDMO Services Market Size by Therapeutic

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Area, (USD Million), 2021 & 2025 & 2032
Figure 44. World Therapeutic Bioconjugate CDMO Services Market Size Market Share by Therapeutic Area in 2025
Figure 45. Oncology
Figure 46. Rare and Genetic Diseases
Figure 47. Autoimmune and Inflammatory Diseases
Figure 48. Ophthalmology and Other Specialty Diseases
Figure 49. Other
Figure 50. World Therapeutic Bioconjugate CDMO Services Market Size Market Share by Therapeutic Area (2021-2032)
Figure 51. World Therapeutic Bioconjugate CDMO Services Market Size by Application, (USD Million), 2021 & 2025 & 2032
Figure 52. World Therapeutic Bioconjugate CDMO Services Market Size Market Share by Application in 2025
Figure 53. Large Pharmaceutical Companies
Figure 54. Biotechnology Companies
Figure 55. Other
Figure 56. World Therapeutic Bioconjugate CDMO Services Market Size Market Share by Application (2021-2032)
Figure 57. Therapeutic Bioconjugate CDMO Services Industrial Chain
Figure 58. Methodology
Figure 59. Research Process and Data Source

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