

# The 2025-2030 World Outlook for Next-Generation Biologics

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## Abstracts

This study covers the world outlook for next-generation biologics across more than 190 countries. For each year reported, estimates are given for the latent demand, or potential industry earnings (P.I.E.), for the country in question (in millions of U.S. dollars), the percent share the country is of the region, and of the globe. These comparative benchmarks allow the reader to quickly gauge a country vis-à-vis others. Using econometric models which project fundamental economic dynamics within each country and across countries, latent demand estimates are created. This report does not discuss the specific players in the market serving the latent demand, nor specific details at the product level. The study also does not consider short-term cyclicalities that might affect realized sales. The study, therefore, is strategic in nature, taking an aggregate and long-run view, irrespective of the players or products involved.

In this report we define the sales of next-generation biologics as including all commonly understood products and/or services falling within this broad category, such as antibody therapies, antibody-drug conjugates (ADC), engineered antibodies, bispecific treatments, antibody fragments, antibody-like proteins (ALP), oral insulins, ultra-long and ultra-rapid acting therapies, recombinant coagulation factors, growth hormones, tissue engineering, gene therapies and stem cells, irrespective of product packaging, formulation, size, or form. Companies participating in this industry include 3SBio, Aastrom Biosciences (now Vericel Corporation), AbbVie, Abcam, Ablynx, ADC Therapeutics, Adnexus (part of Bristol-Myers Squibb), ADOCIA, Advanced Cell Technology (now Ocata Therapeutics), Advantagene, Affibody, Agensys (now part of Astellas Pharma), Alcon (part of Novartis), Alexion Pharmaceuticals, Alfacell (now Tamir Biotechnology), Alkermes, Allergan, Allozyne, Ambrx, Amgen, AMRI, AnGes, Applied Genetic Technologies (AGTC), Ark Therapeutics, Astellas Pharma, AstraZeneca, Athersys, Avita Medical, Baxter International, Bayer, Belrose Pharma, Benda

Pharmaceutical, BIOCAD, BioCancell Therapeutics, Biocon, Biodel, Biogen Idec, Bioheart, BioMarin Pharmaceutical, Biopartners (part of Bioton), Biotest Pharmaceuticals, Bioton, BioVex Group (part of Amgen), BioWa (part of Kyowa Hakko Kirin), Bluebird Bio, Boehringer Ingelheim, BrainStorm Cell Therapeutics, Bristol-Myers Squibb, Capricor Therapeutics, Cardio3 Biosciences, Cardium Therapeutics, Catalent Pharma Solutions, Celgene, Celladon, CellCoTec, Celldex Therapeutics, Cellerant Therapeutics, Cellular Dynamics International (CDI), Cephalon (part of Teva), CEPiA (part of Sanofi), Ceregene, Chatham Therapeutics, Chiesi Farmaceutici, Chugai (part of Roche), Civitas Therapeutics, Clayton Biotechnologies, Cold Genesys, Concoris, Covagen, Crescendo Biologics, Critical Pharmaceuticals, CSL Behring, Cytomedix, Cytori Therapeutics, Dance Biopharm, Delenex Therapeutics, Depuy Mitek (part of J&J), Diabetology, Diasome Pharmaceuticals, Dr. Reddy's Laboratories, Dyax, Eddingpharm, eGen, Eisai, Elan Pharmaceuticals (now part of Perrigo Company), Eli Lilly, Emisphere, Enzon Pharmaceuticals, EnzymeRx, Epitomics (part of Abcam), ESBATech (part of Novartis), Flamel Technologies, Fresenius Biotech (now named Neovii Biotech, part of Neopharm), Fuji Pharma, Gamida Cell, Genentech (part of Roche), Generex Biotechnology, Genmab, Genzyme (part of Sanofi), Geron, GlaxoSmithKline (GSK), GlycoExpress, Glycotope, Halozyme Therapeutics, Hanmi Pharmaceutical, Health Canada, Hikma Pharmaceuticals, Histogenics, Humacyte, Human Stem Cells Institute (HSCI), Igenica, Immunogen, Immunomedics, Innovent Biologics, Integra LifeSciences, Introgen Therapeutics, Jain Foundation, JCR Pharmaceuticals, Johnson & Johnson, Juventas Therapeutics, Karolinska Institute, Kyowa Hakko Kirin, LG Life Sciences, LifeCell, Lonza Group, Loyola University, MacroGenics, Mannkind, MedImmune (part of AstraZeneca), Merck, Merrimack Pharmaceuticals, Merrion Pharmaceuticals, Mersana Therapeutics, Mesoblast, Micromet (part of Amgen), Millennium Pharmaceuticals, Mitsubishi Tanabe Pharma, Mochida Pharmaceutical, Molecular Partners, MorphoSys, Nektar Therapeutics, Neopharm Group, NeoStem, Neuralstem, Nippon Kayaku, Novartis, Novo Nordisk, Nuron Biotech, NuVasive, Ocata Therapeutics (formerly Advanced Cell Technology), OncoSec Medical, OPKO Health, Oramed Pharmaceuticals, Organogenesis, Organovo, Orthofix, Osiris Therapeutics, PeriphaGen Holdings, Perrigo Company, Pfizer, Pieris, Piramal Group, Progenics Pharmaceuticals, Prolor Biotech (part of OPKO Health), Rani Therapeutics, ratiopharm (part of Teva), Redwood Bioscience, Regeneron Pharmaceuticals, Reliance Life Sciences, ReNeuron, RIKEN [Japan], Roche, SAFC, Sandoz (part of Novartis), Sanofi, Seattle Genetics, Shanghai Sunway Biotech, Shenzhen SiBiono GeneTech (part of Benda), Shreya Life Sciences, SironRX Therapeutics, Skye Orthobiologics, Sorrento Therapeutics, Sotex PharmFirm, Spark Therapeutics, Spectrum Pharmaceuticals, Spirogen (part of AstraZeneca), Stelis Biopharmaceuticals (part of Strides Arcolab), Stem CentRx, Stempeutics Research,

Strativa Pharmaceuticals, Strides Arcolab, Sutro Biopharma, Swedish Orphan Biovitrum (Sobi), Symphogen, Synthon, Takeda Pharmaceutical Company, Teva Pharmaceutical Industries, Thermalin Diabetes, TiGenix, TRION Pharma, UCB, UniQure, USV, VBL Therapeutics, Vericel, Versartis, viDA Therapeutics, Viventia Biotechnologies, Inc., VX Pharma, Wyeth (part of Pfizer), Xencor, Xeris Pharmaceuticals, and Zydus Cadila. In addition to the sources indicated, additional information available to the public via news and/or press releases published by players in the industry was considered in defining and calibrating this category. All figures are in a common currency (U.S. dollars, millions) and are not adjusted for inflation (i.e., they are current values). Exchange rates used to convert to U.S. dollars are averages for the year in question. Future exchange rates are assumed to be constant in the future at the current level (the average of the year of this publication's release in 2024).

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