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# Biologics Outsourcing Global Market - Forecast to 2030

https://marketpublishers.com/r/B700A16D87BEN.html
Date: November 2022
Pages: 706
Price: US$ 7,200.00 (Single User License)
ID: B700A16D87BEN

## Abstracts

Biologics are the therapeutic entities composed of sugars, proteins, or nucleic acids and made from natural sources such as human, animal or microorganisms. Biologics also include live attenuated microorganisms (vaccines), allergenic extracts (allergy shots), human cells and tissues (for transplantation), cell and gene therapeutics. Similar to the conventional therapeutics, these drugs help in treating several diseases but are highly specific and more efficient in their disease healing mechanisms. The biologic entities like monoclonal antibodies and recombinant proteins target specific areas during their molecular mechanism of disease curing.

Even though biologics are highly expensive when compared to the conventional small molecule drugs, these target specific therapeutics have proven to be very beneficial for patients and also ensure higher profit margins to the drug manufacturers. The escalating adoption of biologics and elevating demand for the highly efficient biotherapeutics from the value-centric patient population across the globe, increasing investments on research and developmental activities of biologics and advanced, next-generation biotherapeutics, a favorable and streamlined regulatory environment that is expediting the novel product approval process and the expansion of biosimilar market have all led to the rapid growth of the biopharmaceutical market. Due to the increasing demand for biologics drugs and increased regulatory approvals for these drugs, there is huge demand for biologics manufacture and testing at various levels of clinical studies as well as commercial supply. This fast pacing biologic industry coupled with insufficient or lack of in house biologic development and manufacturing capabilities and capacities of biopharmaceutical companies has spurred these companies to outsource the different parts of biologic development and manufacturing process to highly efficient service providing organizations. The Large Biopharma companies are coming up with strategies to cut down on their operational costs and concentrate more on their core

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competencies by outsourcing this piece of work to contract research organizations (CROs), contract development and manufacturing organizations (CDMOs) and contract manufacturing organizations (CMOs). These organizations bridge the gap between demand and supply and ensure the drug discovery and manufacturing process gets much faster and convenient; thus bringing the life-saving drugs to the market and the needy patients at the earliest.

The biologics outsourcing global market is expected to grow at a double digit CAGR from 2022 to 2030 to reach $106.7 billion by 2030. Major drivers for the biologics outsourcing market include increasing trend of outsourcing among the biopharma companies for gaining an economical access to advanced biologics development and manufacturing capacities and capabilities, advanced bioprocessing capabilities of bioservice providers, increasing approvals and adoption of biologics, increasing R&D spend of biopharma companies and escalating approvals and uptake of biosimilars. Factors like emergence of next generation biotherapeutics, development of personalized and orphan indication therapies and the persistently escalating prevalence of chronic, communicable and autoimmune diseases are expected to boost the market growth. However, increasing focus on in-house biologics manufacturing, huge capital investments for capacity and capability development and compliance with stringent regulatory guidelines are restraining the market.

The biologics outsourcing global market has been segmented based on the developmental phase, product, end users and geography. Among the discovery, pre-clinical, clinical and commercial phases of biologics development, Commercial Phase outsourcing commanded the highest revenue in 2022 and is expected to grow at a double digit CAGR from 2022 to 2030. Clinical outsourcing segment is expected grow early teen CAGR from 2022 to 2030. The biological outsourcing market by product type is segmented into Antibody, Proteins, Vaccines, Gene therapy, cell therapy and others. Among these, the antibody outsourcing segment accounted for the highest revenue in 2022 and is expected to grow at a high single digit CAGR from 2022 to 20230. Gene therapeutics segment is expected grow at a high double digit CAGR from 2022 to 2030. Based on end-users, biologics outsourcing global market is segmented into Therapeutics, Diagnostics and Research. Among these, Therapeutics accounted for the highest revenue in 2022 and is expected to grow at a double digit CAGR from 2022 to 2030. Based on geography, biologics outsourcing global market is segmented into North America, Europe, Asia-Pacific and RoW. North America dominated the biologics outsourcing market with the highest revenue in 2022 and is expected to grow at high single digit CAGR 2022 to 2030. Whereas, Asia Pacific region is expected to be grow at an early teen CAGR from 2022 to 2030.

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The report specifically emphasizes on the rapidly evolving and high growth potential biologics contract manufacturing services market and cell line development services market. The biologics contract manufacturing global market is expected to grow at double digit CAGR from 2022 to 2030. The contract biomanufacturing global market is driven by the increasing trend of outsourcing among the biopharmaceutical companies, availability of advanced bioprocessing capabilities among the contract bioservice providers, expansion of manufacturing facilities, and the escalating approval and adoption of biologics and the cost effective biosimilars among the value centric global patient pool leading to huge volume demand for biologics. Emergence of advanced biotherapeutics, increasing R&D investments by the biopharma companies, development of precision and orphan indication therapies and the persistently increasing prevalence of chronic, communicable and autoimmune diseases are also boosting contract biomanufacturing market growth.

The biologics contract biomanufacturing services global market is classified based on product, developmental phase, process, end users and geography. Based on the product, the biologics CMO global market divided into Drug substance manufacturing and Drug product manufacturing. Among these, drug substance manufacturing accounted for the highest revenue in 2022 and is expected to grow at a double digit CAGR from 2022 to 2030. The Drug Product manufacturing is expected to grow at an early teen CAGR from 2022 to 2030. Based on the developmental phase, the contract Biomanufacturing global market has been segmented as clinical phase contract biomanufacturing and commercial phase contract biomanufacturing. Among these phases, the commercial phase contract biomanufacturing accounted for the highest revenue in 2022 and is expected to grow at a double digit CAGR from 2022 to 2030. Clinical segment is expected to grow at an early teen CAGR from 2022 to 2030. Based on the process of contract biomanufacturing, the global market has been grouped into mammalian contract biomanufacturing, microbial contract biomanufacturing and other contract biomanufacturing processes (plant or insect cell based). Among these, mammalian cell culture CMO market is accounted for the highest revenue in 2022 and is expected to grow at an early teen CAGR from 2022 to 2030. The contract biomanufacturing services global market, based on end-users has been segmented into contract biomanufacturing for diagnostics, research reagents and therapeutics. Among these, contract biomanufacturing of therapeutics accounted for the highest revenue in 2022 and is expected to grow at an early teen CAGR from 2022 to 2030. Research segment is expected to grow at an early teen CAGR from 2022 to 2030. The vectors are basic important components in the development of biological modalities such as gene therapy, cell therapy, vaccines and also in the development of recombinant cell lines

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CHO and others for the production of biologics such as monoclonal antibodies, recombinant proteins and others. The Viral Vector & Plasmid DNA Contract Manufacturing global market is estimated to be $XX million in 2022 and is expected to grow at early teen CAGR from 2022 to 2030. Based on vector type, Viral Vector & Plasmid DNA Contract Manufacturing global market is divided into viral vector and plasmid DNA manufacturing. Among these, Plasmid DNA Contract Manufacturing segment is accounted for the highest revenue in 2022 and is expected to grow at a mid single digit CAGR from 2022 to 2030. Viral vector Contract Manufacturing is expected to grow at a high teen CAGR from 2022 to 2030. Based on modalities, Viral Vector and Plasmid DNA contract manufacturing global market is segmented into Vaccines, Cell & Gene Therapies and Others. Among these, Vaccines segment is accounted for the highest revenue in 2022 and is expected to grow at a high single digit CAGR from 2022 to 2030. Cell & Gene Therapies is expected to grow at a high double digit CAGR from 2022 to 2030. Based on the facility type, it can be categorized into Stainless steel and Single-use. Stainless steel CMO global manufacturing capacity is estimated to be XX million L in 2022 and is expected to grow at a high single digit CAGR from 2022 to 2030. Single-Use CMO global manufacturing capacity is expected to grow at a high double digit CAGR from 2022 to 2030. The contract biomanufacturing services global market based on geography is segmented into North America, Europe, Asia-Pacific and the Rest of the world (ROW). North America contributed highest revenue in 2022 and is growing at a high single digit CAGR from 2022 to 2030. Asia Pacific region is expected to grow at a early teen CAGR from 2022 to 2030.

The cell line development service market is expected to grow at a double digit CAGR from 2022 to 2030 to reach $2,093.2 million by 2030. Increasing demand for monoclonal antibodies, recombinant proteins and vaccines, growing incidence rate of oncology, autoimmune disorders, infectious diseases & genetic disorders and growth in research activities related to the diseases and also recombinant cell lines for the production recombinant biopharmaceutical proteins are driving the market. Technological advancements in cell line engineering (gene editing tools) & cell line development technologies, screening technologies and process development are giving immense growth opportunities for the market. However, complexities in the development of stable cell lines and high risk of contamination due to complex purification methods are restraining the market. Furthermore, stringent and complex regulations and the high cost and technical requirement to adhere to accreditations such as GMP are posing threat to the industry.

Cell line development service global market is classified based on the expression system, cell line type, application and geography. Based on expression system, cell line

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development service global market is segmented into microbial, mammalian and others. Among these, mammalian expression system is accounted for the highest revenue of in 2022 and is expected to grow at a double digit CAGR from 2022 to 2030. Based on the cell line type, global cell line development service market is segmented into CHO, Mouse Myeloma (NS0; Sp2/0), Human Embryonic Kidney (HEK), Baby Hamster Kidney (BHK), Hybridoma, Human Embryonic Retina (PER.C6) and others. Among these, CHO cell line accounted for the highest revenue in 2022 and is expected to grow at an early teen CAGR from 2022 to 2030. Based on application, cell line development service global market is segmented into research, bio production and diagnostics. Among these, bioproduction segment accounted for the highest revenue in 2022 and is expected to grow at a double digit CAGR from 2022 to 2030. Based on the geography, cell line development service global market is segmented into North America, Europe, Asia-Pacific and Rest of the world. North America commanded the highest revenue in 2022. The market is expected to grow at a high single digit CAGR from 2022 to 2030. Asia Pacific is expected to grow at an early teen CAGR from 2022 to 2030.

The top players in biologics outsourcing global market are Lonza (Switzerland), Catalent (U.S.), SamSung Biologics (South Korea), WuXi Biologics (China), Thermo Fisher (Patheon N.V.+Brammer Bio) (U.S.), FUJIFILM Holdings Corporation (FujiFilm Diosynth) (Japan), Merck KGaA (Germany), Boehringer Ingelheim (Germany), Laboratory Corporation of America Holdings (U.S.), Charles River Laboratories (U.S.), JSR corporation (U.S.), WuXi Apptech (China), Genscript Biotech Corporation (China), Emergent Biosciences (U.S.), Asahi Glass Company (AGC Biologics) (Japan) and others.

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# Contents


## 1 BIOLOGICS OUTSOURCING GLOBAL MARKET

1.1 EXCEUTIVE SUMMARY
1.2 LANDSCAPE OF BIOLOGICS MARKET
1.3 RISE OF BIOSIMILARS
1.4 BIOSIMILARS GLOBAL MARKET, BY REGION
1.5 BIOLOGICS GLOBAL MARKET
1.6 TOP DESTINATION FOR BIOLOGICS OUTSOURCING
  1.6.1 CHINA BIOLOGICS OUTSOURCING MARKET
  1.6.2 INDIA BIOLOGICS OUTSOURCING MARKET
  1.6.3 CHINA VS INDIA - BIOLOGICS MARKET
  1.6.4 REGULATIONS AND GOVERNMENT INITIATIVES
  1.6.5 CAPABILITIES AND TECHNOLOGIES

## 2 MARKET ANALYSIS

2.1 INTRODUCTION
2.2 FACTORS INFLUENCING MARKET
  2.2.1 DRIVERS AND OPPORTUNITIES
    2.2.1.1 Increasing trend of outsourcing
    2.2.1.2 Advanced bioprocessing capabilities of bioservice providers
    2.2.1.3 Emergence of next generation biologics
    2.2.1.4 Escalating approvals and uptake of biosimilars
    2.2.1.5 Increasing approvals and adoption of biologics
    2.2.1.6 Increasing R&D expenditures
    2.2.1.7 Increasing prevalence of chronic, communicable and autoimmune diseases
    2.2.1.8 Development of personalized and orphan indication therapies
  2.2.2 RESTRAINTS AND THREATS
    2.2.2.1 Increasing focus on in-house biologics manufacturing
    2.2.2.2 Huge capital investments for capacity and capability development
    2.2.2.3 Compliance with stringent regulatory guidelines
    2.2.2.4 Concerns about IP protection
    2.2.2.5 Competition and trend of outsourcing of low volume biologics

## 3 BIOLOGICS OUTSOURCING GLOBAL MARKET, MARKET ANALYSIS

3.1 INTRODUCTION

+44 20 8123 2220
info@marketpublishers.com

3.2 BIOLOGICS OUTSOURCING GLOBAL MARKET BASED ON PHASE
3.2.1 DISCOVERY AND PRE-CLINICAL DEVELOPMENT PROCESS
3.3 BIOLOGICS OUTSOURCING GLOBAL MARKET, BASED ON PRODUCT TYPE
3.3.1 ANTIBODY
3.3.1.1 Monoclonal antibody
3.3.1.2 Bispecific antibody
3.3.1.3 Antibody drug conjugates
3.3.1.4 Others (polyclonal antibody, antibody fragments)
3.3.2 RECOMBINANT PROTEIN
3.3.3 VACCINES
3.3.4 GENE THERAPY
3.3.5 CELL THERAPY
3.3.6 OTHERS
3.4 BIOLOGICS OUTSOURCING GLOBAL MARKET, BASED ON ENDUSERS
3.4.1 THERAPEUTICS
3.4.2 DIAGNOSTICS
3.4.3 RESEARCH
3.5 BIOANALYTICAL TESTING SERVICES
3.6 MARKET SHARE ANALYSIS
3.7 COMPANY DEVELOPMENTS
3.7.1 AGREEMENT, COLLABORATIONS AND PARTNERSHIPS
3.7.2 EXPANSION
3.7.3 ACQUISITIONS
3.7.4 FACILITY APPROVAL
3.7.5 NEW PRODUCT, TECHNOLGY AND SERVICE LAUNCH
3.7.6 OTHERS
3.8 SERVICE COST ANALYSIS
3.8.1 ANTIBODY PRODUCTION SERVICE COSTS
3.8.2 CUSTOM MONOCLONAL ANTIBODY PRODUCTION SERVICE COSTS
3.8.3 CUSTOM POLYCLONAL ANTIBODY PRODUCTION SERVICE COSTS
3.8.4 PROTEIN PRODUCTION SERVICE COSTS
3.8.5 ADDITIONAL ANTIBODY AND PROTEIN SERVICES
3.8.6 GENE EDITTING SERVICES
3.8.7 CAR-T/NK PLATFORM SERVICES

**4 BIOLOGICS OUTSOURCING GLOBAL MARKET - BIOMANUFACTURING**

4.1 INTRODUCTION
4.2 MARKET DYNAMICS

+44 20 8123 2220
info@marketpublishers.com

4.3 BIOLOGICS CMO GLOBAL MARKET BASED ON PRODUCT
4.3.1 DRUG SUBSTANCE MANUFACTURING
4.3.2 DRUG PRODUCT MANUFACTURING
4.4 IN HOUSE VS CMO CAPACITY
4.4.1 IN-HOUSE
4.4.2 CMO
4.5 GLOBAL BIOMANUFACTURING CAPACITY
4.6 BIOLOGICS CONTRACT MANUFACTURING ORGANIZATIONS, BASED ON PHASE
4.6.1 CLINICAL
4.6.2 COMMERCIAL
4.7 CONTRACT BIOMANUFACTURING, BASED ON PROCESS
4.7.1 BIOMANUFACTURING BY MAMMALIAN CELL CULTURE
4.7.2 MAMMALIAN CELL CULTURE BIOMANUFACTURING V/S MICROBIAL AND OTHER CELL CULTURES
4.7.3 BIOMANUFACTURING BY MICROBIAL CELL CULTURE
4.7.4 MICROBIAL CELL CULTURE CMO BIOMANUFACTURING CAPACITY
4.7.5 BIOMANUFACTURING BY OTHER CELL CULTURE
4.8 CONTRACT BIOMANUFACTURING GLOBAL MARKET, BASED ON END USERS
4.8.1 CONTRACT BIOMANUFACTURING OF DIAGNOSTICS
4.8.2 CONTRACT BIOMANUFACTURING OF RESEARCH REAGENTS
4.8.3 CONTRACT BIOMANUFACTURING OF THERAPEUTICS
4.8.3.1 BIOMANUFACTURING OF ANTIBODIES
4.8.3.2 BIOMANUFACTURING OF RECOMBINANT PROTEINS
4.8.3.3 BIOMANUFACTURING OF VACCINES
4.8.3.4 GENE THERAPY, CELL THERAPY AND OTHER BIOLOGICS CONTRACT BIOMANUFACTURING
4.9 BIOMANUFACTURING OUTSOURCING GLOBAL MARKET, BASED ON REGION
4.10 VIRAL VECTOR & PLASMID DNA CONTRACT MANUFACTURING MARKET BASED ON VECTOR TYPE
4.10.1 VIRAL VECTOR CONTRACT MANUFACTRUING
4.10.2 PLASMID DNA CONTRACT MANUFACTRUING
4.11 VIRAL VECTOR & PLASMID DNA CONTRACT MANUFACTURING MARKET, BASED ON MODALITY
4.11.1 VACCINES
4.11.2 CELL AND GENE THERAPIES
4.11.3 OTHERS
4.12 CONTRACT BIOMANUFACTURING CAPACITY PENETRATION
4.12.1 CAPACITY COMPARISION

+44 20 8123 2220
info@marketpublishers.com

4.13 STAINLESS STEEL VS SINGLE-USE FACILITIES
4.13.1 STAINLESS STEEL FACILITY
4.13.2 SINGLE-USE FACILITY
4.13.3 COST OF GOODS COMPARSION BETWEEN STAINLESS STEEL AND SINGLE-USE FACILITIES
4.14 COMPETATIVE LANDSCAPE
4.14.1 CONTRACT MANUFACTURING GLOBAL MARKET SHARE, BY LEADING PLAYERS
4.14.2 COMPANY DEVELOPMENTS
4.14.2.1 EXPANSION
4.14.2.2 COLLABORATION AND PARTNERSHIP
4.14.2.3 AGREEMENT
4.14.2.4 ACQUISITION
4.14.2.5 FACILITY APPROVALS
4.14.2.6 NEW PRODUCT, TECHNOLOGY AND SERVICE LAUNCH
4.14.2.7 OTHER DEVELOPMENTS

**5 BIOLOGICS OUTSOURCING GLOBAL MARKET - CELL LINE DEVELOPMENT**

5.1 INTRODUCTION
5.1.1 MARKET DYNAMICS
5.2 CELL LINE DEVELOPMENT
5.2.1 CELL LINE CONSTRUCTION
5.2.2 HOST CELL LINE ENGINEERING EXPRESSION SYSTEM
5.2.3 EXPRESSION VECTOR AND HOST CELL LINE ENGINEERING
5.2.4 TRANSIENT GENE EXPRESSION
5.2.5 STABLE CELL LINE DEVELOPMENT
5.2.6 SCREENING
5.2.7 UPSTREAM PROCESS DEVELOPMENT
5.3 HOST CELL LINES
5.4 CELL LINE DEVELOPMENT SERVICES MARKET, BASED ON EXPRESSION SYSTEM
5.4.1 MAMMALIAN EXPRESSION SYSTEMS
5.4.2 MICROBIAL EXPRESSION SYSTEMS
5.4.3 OTHERS (INSECT AND PLANT CELL)
5.5 CELL LINE DEVELOPMENT SERVICES, BASED ON CELL LINE TYPE
5.5.1 CHO
5.5.2 MURINE/MOUSE MYELOMA (NS0, SP2/0)
5.5.3 BABY HAMSTER KIDNEY (BHK) CELLS

+44 20 8123 2220
info@marketpublishers.com

5.5.4 HUMAN EMBRYONIC KIDNEY (HEK) CELLS
5.5.5 HUMAN EMBRYONIC RETINAL CELLS (PER.C6)
5.5.6 HYBRIDOMA
5.5.7 OTHERS (E.COLI, YEAST, INSECT CELL, HT-1080, HELA CELL LINE, CAP, HKB-11, HUH-7)
5.6 CELL LINE DEVELOPMENT SERVICES, BASED ON APPLICATIONS
5.6.1 RESEARCH
5.6.2 BIOPRODUCTION
5.6.3 DIAGNOSTICS
5.7 CELL BANKING SERVICES
5.8 CELL LINE CHARACTERIZATION SERVICES
5.9 MARKET SHARE ANALYSIS
5.10 KEY DEVELOPMENTS
5.10.1 AGREEMENT, COLLABORATION AND PARTNERSHIP
5.10.2 NEW TECHNOLOGY, PRODUCT AND SERVICE LAUNCH
5.10.3 OTHER DEVELOPMENTS

**6 COMPANY PROFILES**

6.1 ABBVIE INC.
6.1.1 OVERVIEW
6.1.2 FINANCIALS
6.1.3 SERVICE PORTFOLIO
6.1.4 KEY DEVELOPMENTS
6.1.5 SWOT ANALYSIS
6.2 AGC INC.
6.2.1 OVERVIEW
6.2.2 FINANCIALS
6.2.3 SERVICE PORTFOLIO
6.2.4 KEY DEVELOPMENTS
6.2.5 SWOT ANALYSIS
6.3 AVID BIOSERVICES, INC.
6.3.1 OVERVIEW
6.3.2 FINANCIALS
6.3.3 SERVICE PORTFOLIO
6.3.4 KEY DEVELOPMENTS
6.3.5 SWOT ANALYSIS
6.4 BOEHRINGER INGELHEIM INTERNATIONAL GMBH
6.4.1 OVERVIEW

+44 20 8123 2220
info@marketpublishers.com

6.4.2 FINANCIALS
6.4.3 SERVICE PORTFOLIO
6.4.4 KEY DEVELOPMENTS
6.4.5 SWOT ANALYSIS
6.5 CATALENT INC.
6.5.1 OVERVIEW
6.5.2 FINANCIALS
6.5.3 SERVICE PORTFOLIO
6.5.4 KEY DEVELOPMENTS
6.5.5 SWOT ANALYSIS
6.6 CHARLES RIVER LABORATORIES
6.6.1 OVERVIEW
6.6.2 FINANCIALS
6.6.3 SERVICE PORTFOLIO
6.6.4 KEY DEVELOPMENTS
6.6.5 SWOT ANALYSIS
6.7 CURIA
6.7.1 OVERVIEW
6.7.2 FINANCIALS
6.7.3 SERVICE PORTFOLIO
6.7.4 KEY DEVELOPMENTS
6.7.5 SWOT ANALYSIS
6.8 EMERGENT BIOSOLUTIONS INC.
6.8.1 OVERVIEW
6.8.2 FINANCIALS
6.8.3 SERVICE PORTFOLIO
6.8.4 KEY DEVELOPMENTS
6.8.5 SWOT ANALYSIS
6.9 EUROFINS SCIENTIFIC S.E.
6.9.1 OVERVIEW
6.9.2 FINANCIALS
6.9.3 SERVICE PORTFOLIO
6.9.4 KEY DEVELOPMENTS
6.9.5 SWOT ANALYSIS
6.10 FUJIFILM HOLDINGS CORPORATION (FUJIFILM DIOSYNTH BIOTECHNOL0GIES)
6.10.1 OVERVIEW
6.10.2 FINANCIALS
6.10.3 SERVICE PORTFOLIO

+44 20 8123 2220
info@marketpublishers.com

6.10.4 KEY DEVELOPMENTS
6.10.5 SWOT ANALYSIS
6.11 GENSCRIPT BIOTECH CORPORATION
6.11.1 OVERVIEW
6.11.2 FINANCIALS
6.11.3 SERVICE PORTFOLIO
6.11.4 KEY DEVELOPMENTS
6.11.5 SWOT ANALYSIS
6.12 JSR CORPORATION
6.12.1 OVERVIEW
6.12.2 FINANCIALS
6.12.3 SERVICE PORTFOLIO
6.12.4 KEY DEVELOPMENTS
6.12.5 SWOT ANALYSIS
6.13 LABORATORY CORP OF AMERICA HOLDINGS
6.13.1 OVERVIEW
6.13.2 FINANCIALS
6.13.3 SERVICE PORTFOLIO
6.13.4 KEY DEVELOPMENTS
6.13.5 SWOT ANALYSIS
6.14 LONZA GROUP LTD.
6.14.1 OVERVIEW
6.14.2 FINANCIALS
6.14.3 SERVICE PORTFOLIO
6.14.4 KEY DEVELOPMENTS
6.14.5 SWOT ANALYSIS
6.15 MERCK KGA
6.15.1 OVERVIEW
6.15.2 FINANCIALS
6.15.3 PRODUCT PORTFOLIO
6.15.4 KEY DEVELOPMENTS
6.15.5 SWOT ANALYSIS
6.16 NATIONAL RESILIENCE, INC.
6.16.1 OVERVIEW
6.16.2 FINANCIALS
6.16.3 SERVICE PORTFOLIO
6.16.4 KEY DEVELOPMENTS
6.16.5 SWOT ANALYSIS
6.17 RENTSCHLER BIOPHARMA SE

+44 20 8123 2220
info@marketpublishers.com

6.17.1 OVERVIEW
6.17.2 FINANCIALS
6.17.3 SERVICE PORTFOLIO
6.17.4 KEY DEVELOPMENTS
6.17.5 SWOT ANALYSIS
6.18 SAMSUNG BIOLOGICS CO. LTD.
6.18.1 OVERVIEW
6.18.2 FINANCIALS
6.18.3 SERVICE PORTFOLIO
6.18.4 KEY DEVELOPMENTS
6.18.5 SWOT ANALYSIS
6.19 THERMO FISHER SCIENTIFIC INC.
6.19.1 OVERVIEW
6.19.2 FINANCIALS
6.19.3 SERVICE PORTFOLIO
6.19.4 KEY DEVELOPMENTS
6.19.5 SWOT ANALYSIS
6.20 WUXI APPTEC CO., LTD.
6.20.1 OVERVIEW
6.20.2 FINANCIALS
6.20.3 SERVICE PORTFOLIO
6.20.4 KEY DEVELOPMENTS
6.20.5 SWOT ANALYSIS
6.21 WUXI BIOLOGICS (CAYMAN) INC.
6.21.1 OVERVIEW
6.21.2 FINANCIALS
6.21.3 SERVICE PORTFOLIO
6.21.4 KEY DEVELOPMENTS
6.21.5 SWOT ANALYSIS

+44 20 8123 2220
info@marketpublishers.com

# List Of Tables

## LIST OF TABLES

TABLE 1 PATENT EXPIRY OF BIOLOGICS (2018 – 2030)
TABLE 2 BIOSIMILARS GLOBAL MARKET, BY REGION, (2021-2030) ($BN)
TABLE 3 HIGHLIGHTS OF THE REVISED GUIDELINES
TABLE 4 BIOLOGICS OUTSOURCING GLOBAL MARKET REVENUE, BY REGION (2021-2030) ($BN)
TABLE 5 BIOLOGICS OUTSOURCING GLOBAL MARKET REVENUE, BASED ON PHASE (2021-2030) ($BN)
TABLE 6 BIOLOGICS OUTSOURCING GLOBAL MARKET REVENUE, BY PRODUCT (2021-2030) ($BN)
TABLE 7 LIST OF BIOLOGICS APPROVED (2015-2021)
TABLE 8 ANTIBODY OUTSOURCING GLOBAL MARKET REVENUE, BASED ON PRODUCT TYPE (2021-2030) ($BN)
TABLE 9 BIOLOGICS OUTSOURCING GLOBAL MARKET REVENUE, BASED ON END USERS (2021-2030) ($BN)
TABLE 10 AGREEMENT, COLLABORATIONS AND PARTNERSHIPS (2020-2022)
TABLE 11 EXPANSIONS (2020-2022)
TABLE 12 ACQUISITIONS (2020-2022)
TABLE 13 FACILITY APPROVAL (2020-2022)
TABLE 14 PRODUCT, TECHNOLOGY AND SERVICE LAUNCH (2020-2022)
TABLE 15 OTHER DEVELOPMENTS (2020 – 2022)
TABLE 16 SERVICE COMPARISON MATRIX OF THE COMPANY BASED ON BIOLOGICS TYPE
TABLE 17 BIOLOGICS CMO GLOBAL MARKET REVENUE, BASED ON PRODUCT ($ BN)(2021-2030)
TABLE 18 CAPACITY COMPARISON OF CONTRACT MANUFACTURING ORGANIZATIONS V'S IN-HOUSE CAPACITIES (L)(2021-2030)
TABLE 19 BIOLOGICS MANUFACTURED IN MAMMALIAN CELL CULTURE
TABLE 20 CONTRACT MANUFACTURING ORGANIZATIONS CAPACITY, BASED ON PROCESS (L)
TABLE 21 BIOLOGICS MANUFACTURED IN MICROBIAL CELL CULTURE
TABLE 22 BIOMANUFACTURING OUTSOURCING GLOBAL MARKET BASED ON END USERS, (2021-2030) ($BN)
TABLE 23 BIOMANUFACTURING OUTSOURCING GLOBAL MARKET BY REGION, (2021-2030) ($BN)
TABLE 24 VIRAL VECTOR & PLASMID DNA CONTRACT MANUFACTURING

+44 20 8123 2220
info@marketpublishers.com

GLOBAL MARKET REVENUE, BASED ON VECTOR TYPE, (2021-2030) ($MN)
TABLE 25 VIRAL VECTOR & PLASMID DNA CONTRACT MANUFACTURING GLOBAL MARKET REVENUE, BASED ON MODALITY, (2021-2030) ($MN)
TABLE 26 CONTRACT BIOMANUFACTURING GLOBAL CAPACITY, BASED ON FACILITY (2021-2030) (L)
TABLE 27 STAINLESS STEEL CONTRACT BIOMANUFACTURING GLOBAL CAPACITY, BASED ON EXPRESSION SYSTEM (2021-2030) (L)
TABLE 28 SINGLE USE CONTRACT BIOMANUFACTURING GLOBAL CAPACITY, BASED ON EXPRESSION SYSTEM (2021-2030) (L)
TABLE 29 EXPANSION (2020 -2022)
TABLE 30 COLLABORATION AND PARTNERSHIP (2020-2022)
TABLE 31 AGREEMENT (2020 – 2022)
TABLE 32 ACQUISITION (2020 – 2022)
TABLE 33 FACILITY APPROVALS (2020 – 2022)
TABLE 34 NEW PEODUCT, TECHNOLOGY AND SERVICE LAUNCH
TABLE 35 OTHER DEVELOPMENTS (2020 – 2022)
TABLE 36 COMPANY COMPARISON MATRIX, BY MANUFACTURING CAPABILITY
TABLE 37 CELL LINE DEVELOPMENT SERVICES GLOBAL MARKET, BASED ON REGION, (2021-2030) ($MN)
TABLE 38 APPROVED BIOLOGICS AND CELL LINE TYPE (2015-2021)
TABLE 39 NUMBER OF APPROVED BIOLOGICS BY CELL LINE TYPE (2014-2020)
TABLE 40 CELL LINE DEVELOPMENT SERVICES GLOBAL MARKET, BASED ON EXPRESSION SYSTEM, (2021-2030) ($MN)
TABLE 41 CELL LINE DEVELOPMENT SERVICES GLOBAL MARKET, BASED ON CELL TYPE, (2021-2030) ($MN)
TABLE 42 CELL LINE TYPE OF SOME APPROVED BIOLOGICS MODALITIES AND CELL LINE TYPE
TABLE 43 CELL LINE DEVELOPMENT SERVICES GLOBAL MARKET, BY APPLICATION, (2021-2030) ($MN)
TABLE 44 CELL LINE DEVELOPMENT TECHNOLOGIES
TABLE 45 CELL LINE DEVELOPMENT SERVICES COST
TABLE 46 AGREEMENTS (2020 -2022)*
TABLE 47 NEW TECHNOLOGY, PRODUCT AND SERVICE LAUNCH (2020-2022)
TABLE 48 OTHERS (2020-2022)
TABLE 49 COMPARISON MATRIX OF CELL LINE DEVELOPMENT PLAYERS AND SERVICES OFFERED
TABLE 50 ABBVIE INC.: TOTAL REVENUE AND R&D EXPENSES, (2020-2022) (Q2) ($MN)
TABLE 51 ABBVIE INC.: TOTAL REVENUE, BY SEGMENTS, (2020-2022) (Q2) ($MN)

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TABLE 52 ABBVIE INC.: TOTAL REVENUE, BY GEOGRAPHY, (2020-2022) (Q2) ($MN)
TABLE 53 AGC INC.: TOTAL REVENUE AND R&D EXPENSES, (2020-2022) (Q2) ($MN)
TABLE 54 AGC INC.: TOTAL REVENUE, BY SEGMENTS, (2020-2022) (Q2) ($MN)
TABLE 55 AGC INC.: CHEMICALS REVENUE, BY SUB-SEGMENTS, (2020-2022) (Q2) ($MN)
TABLE 56 AGC INC.: TOTAL REVENUE, BY GEOGRAPHY, (2020-2022) (Q2) ($MN)
TABLE 57 AVID BIOSERVICES, INC.: TOTAL REVENUE AND R&D EXPENSES, 2021-2023 (Q1) ($MN)
TABLE 58 BOEHRINGER INGELHEIM: TOTAL REVENUE AND R&D EXPENSES, (2019-2021) ($MN)
TABLE 59 BOEHRINGER INGELHEIM: TOTAL REVENUE, BY SEGMENTS, (2019-2021) ($MN)
TABLE 60 BOEHRINGER INGELHEIM: TOTAL REVENUE, BY GEOGRAPHY, (2019-2021) ($MN)
TABLE 61 CATALENT INC: TOTAL REVENUE AND R&D EXPENSES (2020-2022) ($MN)
TABLE 62 CATALENT INC: TOTAL REVENUE, BY SEGMENT, (2020-2022) ($MN)
TABLE 63 CATALENT INC: TOTAL REVENUE, BY GEOGRPAHY, (2020-2022) ($MN)
TABLE 64 CHARLES RIVER LABORATORIES: TOTAL REVENUE AND R&D EXPENSES, (2020-2022) (Q2)($MN)
TABLE 65 CHARLES RIVER LABORATORIES: TOTAL REVENUE, BY SEGMENTS, (2020-2022) (Q2) ($MN)
TABLE 66 CHARLES RIVER LABORATORIES: TOTAL REVENUE, BY GEOGRAPHY, (2020-2022) (Q2) ($MN)
TABLE 67 EMERGENT BIOSOLUTIONS INC : TOTAL REVENUE AND R & D EXPENSES (2020-2022) (Q2) ($MN)
TABLE 68 EUROFINS SCIENTIFIC S.E. : TOTAL REVENUE AND R & D EXPENSES (2020-2022) (H1) ($MN)
TABLE 69 EUROFINS SCIENTIFIC S.E : TOTAL REVENUE, BY GEOGRAPHY, (2020-2021) (H1) ($MN)
TABLE 70 FUJIFILM HOLDINGS CORPORATION: TOTAL REVENUE AND R&D EXPENSES, (2020-2022) (Q1) ($MN)
TABLE 71 FUJIFILM HOLDINGS CORPORATION: TOTAL REVENUE, BY SEGMENTS, (2020-2022) (Q1)($MN)
TABLE 72 FUJIFILM HOLDING CORPORATION: TOTAL REVENUE, BY GEOGRAPHY, (2020-2022) (Q1) ($MN)
TABLE 73 GENSCRIPT BIOTECH CORPORATION: TOTAL REVENUE AND R&D

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EXPENSES, (2020-2022) (Q2)($MN)
TABLE 74 GENSCRIPT BIOTECH CORPORATION: TOTAL REVENUE, BY SEGMENTS, (2020-2022) (Q2) ($MN)
TABLE 75 GENSCRIPT BIOTECH CORPORATION: TOTAL REVENUE, BY GEOGRAPHY, (2020-2022) (Q2) ($MN)
TABLE 76 JSR CORPORATION: TOTAL REVENUE AND R&D EXPENSES, (2021-2023) (Q1) ($MN)
TABLE 77 JSR CORPORATION: TOTAL REVENUE, BY SEGMENTS, (2021-2023) (Q1) ($MN)
TABLE 78 JSR CORPORATION: TOTAL REVENUE, BY GEOGRAPHY, (2021-2023) (Q1) ($MN)
TABLE 79 LABORATORY CORPORATION: TOTAL REVENUE AND R&D EXPENSES (2020-2022) (Q2) ($MN)
TABLE 80 LABORATORY CORPORATION: TOTAL REVENUE, BY SEGMENTS, (2020-2022) (Q2) ($MN)
TABLE 81 LABORATORY CORPORATION: TOTAL REVENUE, BY GEOGRAPHY, (2020-2022) (Q2) ($MN)
TABLE 82 LONZA GROUP: TOTAL REVENUE & R&D EXPENSES (2020 -2022) (Q2) ($MN)
TABLE 83 LONZA GROUP: TOTAL REVENUE, BY SEGMENT, (2020 -2022) (Q2) ($MN)
TABLE 84 LONZA GROUP: TOTAL REVENUE, BY GEOGRAPHY (2020 -2022) (Q2) ($MN)
TABLE 85 MERCK KGA: TOTAL REVENUE AND R&D EXPENSES, (2020-2022) (Q2) ($MN)
TABLE 86 MERCK KGA: TOTAL REVENUE, BY SEGMENTS, (2020-2022) (Q2) ($MN)
TABLE 87 MERCK KGA: TOTAL REVENUE, BY GEOGRAPHY, (2020-2022) (Q2) ($MN)
TABLE 88 SAMSUNG BIOLOGICS CO: TOTAL REVENUE (2020-2022) (Q2) ($MN)
TABLE 89 SAMSUNG BIOLOGICS: TOTAL REVENUE, BY GEOGRAPHY (2020-2022) (Q2)) ($MN)
TABLE 90 THERMO FISHER SCIENTIFIC INC.: TOTAL REVENUE AND R&D EXPENSES (2020-2022) (Q2) ($MN)
TABLE 91 THERMO FISHER SCIENTIFIC INC.: TOTAL REVENUE, BY SEGMENT, (2020-2022) (Q2) ($MN)
TABLE 92 THERMO FISHER SCIENTIFIC INC.: TOTAL REVENUE, BY GEOGRAPHY (2020-2022)(Q2) ($MN)
TABLE 93 WUXI APPTEC CO., LTD.: TOTAL REVENUE AND R&D EXPENSES, (2020-2022) (Q2) ($MN)

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TABLE 94 WUXI APPTEC CO., LTD.: TOTAL REVENUE, BY SEGMENTS, (2020-2022) (Q2) ($MN)
TABLE 95 WUXI APPTEC CO., LTD.: TOTAL REVENUE, BY GEOGRAPHY, (2020-2022) (Q2) ($MN)
TABLE 96 WUXI BIOLOGICS: TOTAL REVENUE AND R&D EXPENSES, (2020-2022) (Q2)($MN)
TABLE 97 WUXI BIOLOGICS: TOTAL REVENUE, BY SEGMENTS, (2020-2022) (Q2) ($MN)
TABLE 98 WUXI BIOLOGICS: TOTAL REVENUE, BY GEOGRAPHY, (2020-2022) (Q2) ($MN)

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# List Of Figures

## LIST OF FIGURES

FIGURE 1 TOP SELLING DRUGS (2017 – 2021), SMALL MOLECULES V/S BIOLOGICS, (2017-2021)
FIGURE 2 TOP 30 BIOLOGICS PATENT EXPIRY, (2020-2032) AND RISE OF BIOSIMILARS
FIGURE 3 OUTLOOK OF BIOLOGICS GLOBAL MARKET (2020-2030) ($BN)
FIGURE 4 OUTLOOK OF CHINA BIOLOGICS MARKET (2020-2030) ($BN) AND CHINA BIOLOGICS OUTSOURCING MARKET (2020-2030) ($MN)
FIGURE 5 OUTLOOK OF INDIA BIOLOGICS MARKET (2020-2030) ($BN) AND INDIA BIOLOGICS OUTSOURCING MARKET (2020-2030) ($MN)
FIGURE 6 CHINA VS INDIA
FIGURE 7 MARKET DYNAMICS
FIGURE 8 BIOLOGICS OUTSOURCING GLOBAL MARKET REVENUE, BY REGION (2021-2030) ($BN)
FIGURE 9 BIOLOGICS OUTSOURCING GLOBAL MARKET REVENUE, BASED ON PHASE (2022 V/S 2030) ($BN)
FIGURE 10 DISCOVERY BIOLOGICS OUTSOURCING MARKET REVENUE, BASED ON SERVICES 2022 ($ MN)
FIGURE 11 DISCOVERY BIOLOGICS OUTSOURCING MARKET, BASED ON SERVICE TYPE, 2022 ($MN)
FIGURE 12 BIOLOGICS OUTSOURCING GLOBAL MARKET SHARE, BASED ON PRODUCT, (2022 V/S 2030) (%)
FIGURE 13 ANTIBODY OUTSOURCING GLOBAL MARKET SHARE, BASED ON PRODUCT TYPE, (2022 V/S 2030) (%)
FIGURE 14 BIOLOGICS OUTSOURCING GLOBAL MARKET REVENUE, BASED ON END-USERS (2022 V/S 2030) ($BN)
FIGURE 15 BIOLOGICS OUTSOURCING GLOBAL MARKET SHARE ANALYSIS, BY MAJOR PLAYERS, 2022 (%)
FIGURE 16 KEY DEALS (2020-2022)
FIGURE 17 MARKET DYNAMICS OF CONTRACT BIOMANUFACTURING GLOBAL MARKET
FIGURE 18 GLOBAL MANUFACTURING CAPACITY, CGMP V'S NON-CGMP, INHOUSE V'S CMO, 2020-2030
FIGURE 19 CAPACITY UTILIZATION OF CONTRACT MANUFACTURING ORGANIZATIONS, BASED ON STAGE (MILLION LITERS) (2020-2030)
FIGURE 20 BIOLOGICS CMO GLOBAL MARKET REVENUE, BASED ON PHASE,

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(2020-2030) ($BN)
FIGURE 21 BIOLOGICS CMO GLOBAL MARKET REVENUE, BASED ON PROCESS, (2020-2030) ($BN)
FIGURE 22 GLOBAL CAPACITY COMPARISON OF MAMMALIAN, MICROBIAL AND OTHER CULTURE SYSTEMS (MN L) (2020-2030)
FIGURE 23 CMO CAPACITY COMPARISON OF MAMMALIAN, MICROBIAL AND OTHER CULTURE SYSTEMS (MN L) (2020-2030)
FIGURE 24 BIO-MANUFACTURING OUTSOURCING GLOBAL MARKET REVENUE, BASED ON END USERS, (2020-2030) ($BN)
FIGURE 25 ADC PIPELINE FOR CANCER (2020)
FIGURE 26 MONOCLONAL ANTIBODY PIPELINE FOR NON-CANCER INDICATIONS (2020)
FIGURE 27 MONOCLONAL ANTIBODY PIPELINE FOR CANCER (2020)
FIGURE 28 BIO-MANUFACTURING OUTSOURCING GLOBAL MARKET SHARE, BASED ON END USERS, (2022) ($BN)
FIGURE 29 OUTLOOK OF BIOLOGICS CMO GLOBAL MARKET SHARE, BY REGION 2022 (%) AND MANUFACTURING IN METRIC TONS, (2021-2030)
FIGURE 30 VIRAL VECTOR & PLASMID DNA CONTRACT MANUFACTURING GLOBAL MARKET SHARE, BASED ON VECTOR TYPE (2022 VS 2030)
FIGURE 31 VIRAL VECTOR & PLASMID DNA CONTRACT MANUFACTURING GLOBAL MARKET SHARE, BASED ON MODALITY (2022 VS 2030)
FIGURE 32 VECTORS USED IN GENE THERPY CLINCIAL TRIALS IN (2021)
FIGURE 33 CONTRACT BIOMANUFACTURING CAPACITY PENETRATION (2022)
FIGURE 34 CAPACITY COMPARISON OF TOP 20 CONTRACT MANUFACTURING ORGANIZATIONS (L)
FIGURE 35 CONTRACT BIOMANUFACTURING GLOBAL CAPACITY, BASED ON FACILITY (2022 VS 2030) (L)
FIGURE 36 STAINLESS STEEL CONTRACT BIOMANUFACTURING GLOBAL CAPACITY, BASED ON EXPRESSION SYSTEM (2022 VS 2030) (L)
FIGURE 37 SINGLE-USE CONTRACT BIOMANUFACTURING GLOBAL CAPACITY, BASED ON EXPRESSION SYSTEM (2022 VS 2030) (L)
FIGURE 38 CONTRACT MANUFACTURING GLOBAL MARKET SHARE, BY LEADING PLAYERS, 2022 (%)
FIGURE 39 KEY DEALS (2020 – 2022)
FIGURE 40 MARKET DYNAMICS OF CELL LINE DEVELOPMENT
FIGURE 41 CELL LINE DEVELOPMENT SERVICES GLOBAL MARKET SHARE, BY REGION, (2022 VS 2030) (%)
FIGURE 42 NUMBER OF APPROVED BIOLOGICS BY CELL LINE TYPE (2015-2021)
FIGURE 43 CELL LINE DEVELOPMENT SERVICES GLOBAL MARKET, BASED ON

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EXPRESSION SYSTEM, (2022 V/S 2030) ($MN)
FIGURE 44 EXPRESSION SYSTEMS OF SOME APPROVED BIOLOGICS (2015 – 2021)
FIGURE 45 CELL LINE DEVELOPMENT SERVICES GLOBAL MARKET, BASED ON CELL TYPE, (2022 V/S 2030) ($MN)
FIGURE 46 CELL LINE TYPE OF SOME APPROVED BIOLOGICS (NO'S) (2015-2021)
FIGURE 47 CELL LINE TYPE OF SOME APPROVED BIOLOGICS MODALITIES AND CELL LINE TYPE
FIGURE 48 CELL LINE DEVELOPMENT SERVICES GLOBAL MARKET REVENUE, BASED ON APPLICATION, (2022 V/S 2030) ($MN)
FIGURE 49 CELL LINE DEVELOPMENT SERVCIES GLOBAL MARKET SHARE, BY LEADING PLAYERS (2022) (%)
FIGURE 50 KEY DEVELOPMENTS OF CELL LINE DEVELOPMENT SERVICES MARKET PLAYERS, (2020-2022)
FIGURE 51 OVERVIEW: ABBVIE INC.
FIGURE 52 SWOT: ABBVIE INC.
FIGURE 53 OVERVIEW: AGC INC.
FIGURE 54 SWOT: AGC INC.
FIGURE 55 SWOT: AVID BIOSERVICES, INC.
FIGURE 56 OVERVIEW: BOEHRINGER INGELHEIM
FIGURE 57 SWOT: BOEHRINGER INGELHEIM
FIGURE 58 OVERVIEW: CATALENT INC.
FIGURE 59 SWOT: CATALENT INC.
FIGURE 60 OVERVIEW: CHARLES RIVER LABORATORIES
FIGURE 61 SWOT: CHARLES RIVER LABORATORIES
FIGURE 62 SWOT: CURIA
FIGURE 63 SWOT: EMERGENT BIOSOLUTIONS
FIGURE 64 OVERVIEW: EUROFINS SCIENTIFIC
FIGURE 65 SWOT: EUROFINS SCIENTIFIC
FIGURE 66 OVERVIEW: FUJIFILM HOLDING CORPORATION
FIGURE 67 SWOT: FUJIFILM HOLDING CORPORATION
FIGURE 68 OVERVIEW: GENSCRIPT BIOTECH CORPORATION
FIGURE 69 SWOT: GENSCRIPT BIOSCIENCES CORPORATION
FIGURE 70 OVERVIEW: JSR CORPORATION
FIGURE 71 SWOT: JSR CORPORATION
FIGURE 72 OVERVIEW: LABORATORY CORP OF AMERICA HOLDINGS
FIGURE 73 SWOT: LABORATORY CORPORATION OF AMERICA HOLDINGS
FIGURE 74 OVERVIEW: LONZA GROUP

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FIGURE 75 SWOT: LONZA GROUP
FIGURE 76 OVERVIEW: MERCK KGA
FIGURE 77 SWOT: MERCK KGAA
FIGURE 78 SWOT: NATIONAL RESILIENCE, INC.
FIGURE 79 SWOT: RENTSCHLER BIOPHARMA
FIGURE 80 SWOT: SAMSUNG BIOLOGICS
FIGURE 81 OVERVIEW: THERMO FISHER SCIENTIFIC
FIGURE 82 SWOT: THERMO FISHER SCIENTIFIC
FIGURE 83 OVERVIEW: WUXI APPTEC CO., LTD
FIGURE 84 SWOT: WUXI APPTEC CO., LTD
FIGURE 85 OVERVIEW: WUXI BIOLOGICS
FIGURE 86 SWOT: WUXI BIOLOGICS

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