

Global Antibody-Oligonucleotide Conjugates (AOC) CDMO Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Antibody-Oligonucleotide Conjugates (AOC) CDMO market size is predicted to grow from US\$ 409 million in 2025 to US\$ 1182 million in 2032; it is expected to grow at a CAGR of 16.4% from 2026 to 2032.

Antibody-Oligonucleotide Conjugates (AOC) CDMO refers to contract development and manufacturing services for AOC molecules, typically covering antibody preparation, oligonucleotide synthesis and modification, linker and conjugation process development, analytical method development and characterization, quality studies, technology transfer, GMP manufacturing, and clinical-to-commercial supply. By combining the targeting capability of antibodies with the gene-modulating function of oligonucleotides, AOCs are designed to enable more selective delivery and therapeutic intervention, which places high demands on antibody engineering, oligonucleotide chemistry, conjugation control, purification, structural characterization, and regulatory compliance. Its upstream supply chain mainly includes antibody bulk substance, oligonucleotide raw materials, linkers, conjugation reagents, purification media, analytical consumables, and GMP packaging materials, while the main downstream customers are innovative pharmaceutical companies, biotechnology firms, and drug developers focused on oligonucleotide conjugates and other next-generation bioconjugated therapeutics. The global gross margin of AOC CDMO in 2025 is estimated at 30%-45%.

The AOC CDMO market is still in a transition stage from technology exploration toward industrial capability building. Unlike traditional antibody outsourcing or stand-alone oligonucleotide outsourcing, this segment requires a much higher level of cross-technology integration. Service providers are expected not only to support antibody development and manufacturing, but also to manage oligonucleotide synthesis,

modification, conjugation process development, purification, analytical characterization, and quality control within the same framework. As the concept of next-generation conjugated therapeutics continues to evolve, customer expectations are moving beyond single-module outsourcing toward integrated platform services that can support early development, clinical supply, scale-up, and eventual commercial manufacturing.

From the current market perspective, competition in AOC CDMO services is not yet fully mature, and the number of companies with clearly established service capabilities remains limited. The sector is still strongly driven by technology depth and project-specific execution. Because AOC drug development combines both antibody and oligonucleotide development logic, it usually involves greater process complexity, deeper analytical work, and more demanding quality studies than conventional biologics or general conjugates. As a result, market demand today is concentrated around feasibility studies, conjugation optimization, analytical method establishment, sample preparation, and support from preclinical programs into early clinical stages. Service platforms that can later extend into scale-up and reliable supply are more likely to gain long-term customer confidence.

Future development is expected to move in the direction of platform integration, end-to-end service expansion, and greater technical refinement. Platform integration means that service providers will continue to strengthen coordination across antibody, oligonucleotide, and conjugation modules. End-to-end expansion reflects the growing preference among customers for partners that can handle process development, quality studies, clinical supply, and commercial manufacturing within a unified workflow, thereby reducing transfer risks and operational gaps. Greater technical refinement will be reflected in stronger demand for site-specific conjugation, structural consistency control, complex impurity profiling, delivery optimization, and more comprehensive regulatory documentation support. As more delivery technologies and conjugation strategies mature, AOC CDMO services are likely to expand from early feasibility-driven demand toward broader late-stage and industrial manufacturing needs.

The key drivers of market growth include continued advances in oligonucleotide therapeutics and targeted delivery technologies, rising investment by innovative drug developers in new conjugated modalities, and the increasing use of outsourcing models in complex drug development. At the same time, the market faces clear constraints, including long technical chains, difficult scale-up, demanding analytical characterization, lengthy quality standard establishment, and the need for close coordination between antibody and oligonucleotide supply systems. For service providers, having expertise in

only one side of the value chain is becoming less sufficient. Over time, the companies with the strongest market position are likely to be those that can combine technical integration, development efficiency, quality systems, project management, and industrial execution within a comprehensive service platform.

LPI (LP Information)' newest research report, the 'Antibody-Oligonucleotide Conjugates (AOC) CDMO Industry Forecast' looks at past sales and reviews total world Antibody-Oligonucleotide Conjugates (AOC) CDMO sales in 2025, providing a comprehensive analysis by region and market sector of projected Antibody-Oligonucleotide Conjugates (AOC) CDMO sales for 2026 through 2032. With Antibody-Oligonucleotide Conjugates (AOC) CDMO sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Antibody-Oligonucleotide Conjugates (AOC) CDMO industry.

This Insight Report provides a comprehensive analysis of the global Antibody-Oligonucleotide Conjugates (AOC) CDMO landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Antibody-Oligonucleotide Conjugates (AOC) CDMO portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Antibody-Oligonucleotide Conjugates (AOC) CDMO market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Antibody-Oligonucleotide Conjugates (AOC) CDMO and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Antibody-Oligonucleotide Conjugates (AOC) CDMO.

This report presents a comprehensive overview, market shares, and growth opportunities of Antibody-Oligonucleotide Conjugates (AOC) CDMO market by product type, application, key players and key regions and countries.

Segmentation by Type:

GMP Services

Non-GMP Services

Segmentation by Capacity Tier:

Small-Scale Production

Pilot-Scale Production

Commercial-Scale Production

Segmentation by Therapeutic Area:

Oncology

Metabolic Diseases

Cardiovascular Diseases

Infectious Diseases

Neurological Disorder

Other

Segmentation by Application:

Pharmaceutical Companies

Biotechnology Companies

Academic and Research Institutions

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

Porton Pharma Solutions

Lonza

3PBIOVIAN

Abzena

GenScript

WuXi XDC

NJ Bio

Medicilon

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