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Antibody Discovery Market

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Abstracts

Upcoming research reports. Delivery timeline: 4 weeks

The global antibody discovery market, valued at US$XX billion in 2023, is forecasted to grow at a robust CAGR of XX%, reaching US$XX billion in 2024 and an impressive US$XX billion by 2029. The major factors driving the growth of this market are technological advancements in the sequencing technology for antibody discovery, rising investment for antibody drug discovery services, expanding use of monoclonal antibodies in therapeutics, diagnostics and research, increasing prevalence of chronic and infectious disease and rising interest in novel modalities such as antibody-drug conjugates, and bispecific antibodies.

Attractive Opportunities in Antibody Discovery Market

Global Antibody Discovery Market Dynamics

Driver: Rising investment for antibody discovery services

The expanding utilisation of antibody drug discovery services and platforms has garnered considerable investor interest, resulting in a notable increase in investment activity. These funding are facilitating the advancement of next-generation antibody discovery platforms, essential for the creation of innovative antibody-based medicines and the promotion of market expansion.

numerous firms are growing through mergers and acquisitions. For instance,In March 2023, Twist Bioscience (US) introduced antibody discovery services through its subsidiary, Twist Biopharma Solutions, following the acquisition of Abveris (US), an antibody discovery CRO, in 2022.

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In March 2021, Antiverse (UK) secured USD 2 million in seed funding to advance an AI-based platform for therapeutic antibody development. LabGenius (UK) secured USD 42 million in a Series B fundraising round in May 2024, increasing its total funding to USD 70 million.

Antibody Solutions (US), a provider of antibody discovery services, secured a USD 1.2 million grant from the Bill & Melinda Gates Foundation to create reagents for expedited malaria diagnostic tests, targeting challenges related to specificity and sensitivity in existing rapid diagnostic tests (RDTs).

These initiatives and progress are substantially propelling the antibody discovery market, promoting innovation, and facilitating the creation of advanced therapies to meet unfulfilled medical requirements.

Restraint: Stringent approval processes and compliance requirements for biologics and biosimilars.

The antibody discovery market is restrained by the stringent regulatory requirements for the development and approval of antibody-based therapeutics. Regulatory agencies, including the US FDA, EMA, and Japan's PMDA, implement regulations which are frequently more complex than small-molecule API. In the development of antibody drugs, there are extensive preclinical and clinical trial phases. For Instance, Phase 1 trials, which typically involve only 10–50 participants, are dedicated to the identification of safe dosages and the resolution of ethical concerns, particularly in the field of oncology. In order to demonstrate clinical benefits such as progression-free survival, later phases, such as Phase 3, need substantial investments and large number of participants, which results in a substantial increase in costs and timelines.

Biologics come under more strict manufacturing rules than small molecule APIs. Standards such as ICH Q11 and Q6B demand strong quality control mechanisms, which raises production's complexity and expense of manufacture. Further raising the development obstacles, 'The Points to Consider in the Manufacture and Testing of Monoclonal Antibody Products for Human Use' of the US FDA highlight the need of doing thorough testing to guarantee the safety, immunogenicity, and consistency of the manufacturing process.

The complicated character of biologics, including monoclonal antibodies, and the great risk of manufacturing variability help to explain their somewhat low approval rates. Usually spanning a decade, the overall development expenses are more than USD 1

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billion. These challenges prevent smaller companies from entering the market, therefore limiting innovation and competitiveness. These legislative actions create significant challenges that hinder the growth of the antibody discovery business even if they ensure patient safety.

Opportunity: Rising Interest in Novel Modalities like ADCs and Bispecific Antibodies

For the antibody discovery market, the increasing acceptance of creative methods including antibody-drug conjugates (ADCs), bispecific antibodies, and nanobodies offers a great potential. Combining strong cytotoxic drugs with the accuracy of monoclonal antibodies, ADCs provide focused cancer treatments with lowered off-target damage. With 11 FDA-approved ADCs to date and more than 1,000 ADCs in many phases of research, ADC technology has evolved dramatically over the years. These figures capture the huge potential and great momentum of this class of treatments.

Another field of fast development are bispecific antibodies, which may attach to two different antigens or epitopes concurrently. Of the 50 new CDER approvals in 2024, 20% were monoclonal antibodies and 6% were bispecific antibodies, demonstrating their expanding

The increased success rates of these novel approaches and their expanding pipeline give antibody discovery firms with several potential to develop better platforms and broaden their service offerings.

Challenge: Emerging antibody alternatives as treatment modalities

The rise of non-antibody-based modalities, including antibody mimetics, aptamers, and scaffold proteins, poses an increasing challenge to the antibody discovery sector. These alternatives are designed to mimic or surpass conventional antibodies, providing advantages such as economical production, scalability, and less variability. A variety of mimetics can be synthesised in bacterial systems, circumventing the necessity for intricate post-translational modifications and costly production techniques.

Synthetic reagents, such as aptamers and molecularly imprinted polymers (MIPs), are increasingly favoured for their exceptional specificity, stability, and capacity to bind challenging or non-immunogenic targets. In contrast to antibodies generated from animals, they mitigate performance variability and ethical issues related to animal utilisation. Their swift advancement and broadening applications in diagnostics and research are redirecting investments and focus from conventional antibody discovery

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platforms.

Although antibodies continue to be the standard for numerous therapeutic applications, these rising alternatives are compelling the antibody discovery market to evolve and innovate in order to sustain its competitive advantage.

Key Market Players

Creative BioLabs (US),
Evotec (Germany),
Bruker (US),
Biocytogen (US),
Charles River Laboratries (US),
Aragen Life Sciences Ltd. (India),
Biodura-Sundia (US),
Twist Bioscience (US),
NanoCellect Biomedical (US),
Sartorius AG (Germany),
Bio-Rad Laboratries, Inc. (US).

Recent Developments:

In January 2025, Biocytogen (US) licensed its fully human antibodies to Sotio (Czech Republic) for developing SOT109, a novel ADC aimed at treating colorectal and gastrointestinal cancers.

In January 2025, Biocytogen (US) and Acepodia (US) announced a strategic partnership to develop dual-payload bispecific antibody-drug conjugates (BsAD2Cs) for complex tumor treatments. The collaboration combines Biocytogen’s RenLite platform with Acepodia’s Antibody-Dual-Drugs Conjugation (AD2C) technology.

In November 2024, Charles River Laboratories (US) and NJ Bio (US) formed a strategic alliance to enhance ADC development and manufacturing services. This partnership combines expertise in engineered antibodies and linker-payload synthesis for improved ADC safety and efficacy.

In October 2024, Twist Bioscience (US) and Absci (US) joined forces to leverage AI and DNA synthesis technologies for accelerated antibody discovery and the development of treatments for unmet medical needs.

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In October 2023, Twist Bioscience (US) partnered with Bayer AG (Germany) to develop and license antibodies, with Twist eligible for up to USD 188 million in milestone payments and royalties for clinical and commercial success.

In August 2024, Aragen Life Sciences Ltd. (India) signed an MoU with Merck KGaA (Germany) to accelerate mAb process development and manufacturing timelines, supporting clinical-to-commercial scale-up.

In July 2024, Biocytogen (US) entered into an agreement with Sotio (Czech Republic) for up to $326 million to develop bispecific ADCs targeting solid tumors. This deal leverages Biocytogen’s transgenic mice to create innovative resistance-busting molecules

In June 2024, Just – Evotec Biologics, a subsidiary of Evotec (Germany), secured a USD 39 million multiyear contract from the U.S. Department of Defense to develop a monoclonal antibody (mAb) manufacturing framework. This initiative aims to enhance rapid response capabilities for biologics medical countermeasures.

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*The above inclusions for Other End Users segment are subject to change during research.

11 ANTIBODY DISCOVERY MARKET, BY REGION

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NOTE 1: REST OF EUROPE INCLUDES SWITZERLAND, RUSSIA, PORTUGAL, POLAND, NETHERLANDS, FINLAND, DENMARK, BELGIUM, AUSTRIA, HUNGARY, ICELAND, IRELAND, NORWAY, AND LUXEMBOURG
NOTE 2: REST OF ASIA PACIFIC INCLUDES BANGLADESH, BHUTAN, NEPAL, SRI LANKA, PHILIPPINES, SINGAPORE, VIETNAM, THAILAND, TAIWAN, CAMBODIA, AND INDONESIA
NOTE 3: REST OF LATIN AMERICA INCLUDES MEXICO, COLOMBIA, ECUADOR, PERU, URUGUAY, CUBA AND CHILE
NOTE 4: REST OF GCC INCLUDES BAHRAIN, KUWAIT, AND OMAN
NOTE 5: INCLUSIONS AND FURTHER GEOGRAPHICAL SEGMENTATION WILL DEPEND ON MARKET SIZE.

12 COMPETITIVE LANDSCAPE

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Note: The provided list of players is tentative and subject to change during the research. Details on business overview, financial information (based on availability), product portfolio, and recent developments will be provided for 20-25 companies.

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