

Bioconjugation Market by Product (Consumables, Instruments (Chromatography, Spectrometry)), Service (Conjugation, Analytical), Technique (Chemical, Click Chemistry), Biomolecule (Antibodies), Application (Therapeutics (ADC), R&D) - Global Forecast to 2029

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Abstracts

The bioconjugation market is expected to grow to USD 10.86 billion by 2029, up from USD 5.27 billion in 2024, at a CAGR of 15.6% between 2024 and 2029. Several key factors impact the growth of the bioconjugation market. The development of targeted therapeutics such as ADCs is expected to be greatly supported by bioconjugation, as the need for more accurate and potent cancer treatments grows. Furthermore, there is a growing focus on technological developments and outsourcing services. Furthermore, emerging countries provide significant development opportunities, and the expanding applications of bioconjugation are expected to drive the market further.

“The antibody conjugation segment accounted for the largest share of by conjugation type segment for the bioconjugation services market in 2023.”

In 2023, the antibody conjugation segment accounted for the largest share of the global bioconjugation services market by conjugation type. The antibody conjugation segment dominates the bioconjugation services market because it is widely used in developing targeted treatments, particularly for cancer. Antibody-drug conjugates (ADCs) enable accurate drug delivery by targeting specific antigens on tumor cells, minimizing off-target effects and toxicity. The favourable results of ADCs in clinical trials, as well as their approval to treat a variety of malignancies, including HER2-positive breast cancer, have increased demand for antibody-based conjugation services.

“The antibodies segment accounted for the largest share of by biomolecule type segment for the bioconjugation products market in 2023.”

In 2023, the antibodies segment accounted for the largest share of the global bioconjugation products market by biomolecule type. The most prominent biomolecule type in the bioconjugation products market is antibodies, especially monoclonal antibodies, which are dominantly used in the development of Antibody-Drug Conjugates (ADCs) with higher accuracy in targeting. Antibodies are integrally used in oncology and have led to several FDA-approved ADC therapies such as Adcetris and Kadcyła. These therapeutic antibodies conjugated with cytotoxic drugs through bioconjugation techniques allow for targeted treatment while minimizing systemic toxicity. Increasing clinical trials and FDA approvals for the drugs based on antibodies further drive the growth of this segment.

“In 2023, the US remained to dominate the bioconjugation market.”

The US dominated the North American bioconjugation market in 2023. The US is the world's largest biopharmaceutical market and the leader in biopharmaceutical research and investment. The United States also has a strong healthcare infrastructure, which encourages research and development in the life sciences. Additionally, the significant presence of many biopharmaceutical companies and growing research activities in the biotechnology industry are propelling market growth in the US. Moreover, the growing prevalence of cancer is also driving the growth of the bioconjugation market.

In-depth interviews have been conducted with chief executive officers (CEOs), Directors, and other

executives from various key organizations operating in the bioconjugation

marketplace.

By Respondent: Supply Side- 70% and Demand Side 30%

By Designation: Managers - 45%, CXO & Directors - 30%, and Executives - 25%

By Region: North America - 40%, Europe -25%, Asia-Pacific -25%, Latin America -5% and Middle East & Africa- 5%

Danaher Corporation (US); Lonza (Switzerland); Thermo Fisher Scientific Inc. (US); Merck KGaA (Germany); AbbVie Inc. (US); WuXi Biologics (Cayman) Inc. (China); Sartorius AG (Germany); are some of the key players in the bioconjugation market.

The study includes an in-depth competitive analysis of these key players in the bioconjugation market, with their company profiles, recent developments, and key market strategies

Research Coverage:

This research report categorizes the bioconjugation market by product type (consumables { reagents and kits [linker and crosslinking reagents & kits, labeling reagents & kits, modification reagents & kits, other reagents & kits], labels [fluorescent tags, enzymes, haptens, polymers, bead coupling, other labels], other consumables}, instruments {chromatography systems, mass spectrometers, spectroscopy instruments, flow cytometers, electrophoresis equipment, filtration systems, mixers/shakers, incubators, other instruments}), technique (chemical conjugation, click chemistry, enzyme-mediated conjugation, photoreactive crosslinking, other techniques), biomolecule type (antibodies, peptides, proteins, oligonucleotides, other biomolecules), application (therapeutics {antibody-drug conjugates (ADCs), peptide-drug conjugates, protein-drug conjugates, other therapeutic applications}, research & development, diagnostics), end user (pharmaceutical & biotechnology companies, CROs & CMOs, academic & research institutes, hospitals and clinical/diagnostic laboratories), service type (custom synthesis & conjugation services, analytical & characterization services, scale-up & manufacturing services, other services), technique (chemical conjugation, click chemistry, enzyme-mediated conjugation, photoreactive crosslinking, other techniques), conjugation type (antibody conjugation, peptide conjugation, protein conjugation, oligonucleotide conjugation, other conjugation services), application (therapeutics, research & development, diagnostics), end user (pharmaceutical & biotechnology companies, academic & research institutes, hospitals and clinical/diagnostic laboratories), and by region (North America, Europe, Asia Pacific, Latin America, Middle East, and Africa). The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the bioconjugation market. A thorough analysis of the key industry players has been done to provide insights into their business overview, products, key strategies, collaborations, partnerships, and agreements. Also, it includes new product launches, collaborations and acquisitions, and recent

developments associated with the bioconjugation market.

Reasons to buy this report

The report will help market leaders/new entrants by providing the closest approximations of the revenue numbers for the overall bioconjugation market and its subsegments. It will also help stakeholders better understand the competitive landscape and gain more insights to position their business better and make suitable go-to-market strategies. This report will enable stakeholders to understand the market's pulse and provide them with information on the key market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

Analysis of key drivers (growing demand for targeted therapies, increasing investments in biopharmaceutical R&D, rising demand for outsourcing services, expanding pipeline of bioconjugated drugs, advancements in bioconjugation technologies), restraints (high cost of bioconjugate development & manufacturing, stringent regulatory requirements), opportunities (high growth potential of emerging economies, expanding applications of bioconjugation), and Challenges (technical complexities) influencing the growth of the market.

Product/Service Development/Innovation: Detailed insights on newly launched products/services of the bioconjugation market

Market Development: Comprehensive information about lucrative markets - the report analyses the market across varied regions.

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the bioconjugation market

Competitive Assessment: In-depth assessment of market shares, growth strategies and product/service offerings of leading players like Danaher Corporation (US), Lonza (Switzerland), Thermo Fisher Scientific Inc. (US), Merck KGaA (Germany), AbbVie Inc. (US), WuXi Biologics (Cayman) Inc. (China), Sartorius AG (Germany), Bio-Rad Laboratories, Inc. (US), among others in the market.

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