

Next Generation Drug Conjugates Market by Product (Enhertu, Amvuttra), Type (Antibody-Small Molecule), Target Ligand (Antibody, Peptide), Payload Type (Oligonucleotide, Radionuclide), Indication (Breast Cancer, Prostate Cancer) - Global Forecast to 2035

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Abstracts

The global next generation drug conjugates market is estimated to reach USD 42.55 billion by 2035 from USD 15.75 billion in 2026, at a CAGR of 11.7% during the forecast period of 2026 to 2035. The global next generation drug conjugates market is projected to witness strong growth over the forecast period, supported by rising adoption of targeted therapies, continued innovation in linker, payload, and targeting ligand technologies, and increasing investment in oncology-focused drug development. Market estimates from published industry sources indicate robust double-digit growth through 2034, reflecting strong clinical and commercial momentum for these therapies. However, safety concerns, manufacturing complexity, and high treatment costs are expected to remain key factors restraining broader market expansion.

“The Enhertu product segment accounted for the largest share by product in the next generation drug conjugates market in 2025.”

Based on product, the next generation drug conjugates market is broadly segmented into Enhertu (fam-trastuzumab deruxtecan-nxki), Pluvicto (lutetium Lu 177 vipivotide tetraxetan), Amvuttra (vutrisiran), Trodelvy (sacituzumab govitecan-hziy), Sacituzumab tirumotecan, Patritumab Deruxtecan (HER3-DXd), 225Ac-PSMA-617, other commercialized products and other pipeline products. The ENHERTU segment held the largest market share in 2025. This leadership can be attributed to several factors, including its strong efficacy across multiple HER2-expressing tumor types, rapid label expansion beyond metastatic breast cancer into broader solid tumor settings, and its

differentiated DXd payload and bystander effect, which have strengthened physician confidence and treatment adoption. In addition, Enhertu has benefited from growing global commercial penetration, increasing use in earlier lines of therapy, and strong backing from AstraZeneca and Daiichi Sankyo's extensive development and commercialization capabilities.

“The antibody-small molecule drug conjugate segment accounted for the largest share by type segment in the next generation drug conjugates market in 2025.”

Based on end users, the global next generation drug conjugates market is segmented into antibody-small molecule drug conjugates, ligand-oligonucleotide conjugates, small molecule-radionuclide conjugates, peptide-radionuclide conjugates, and other conjugate types. In 2025, the antibody-small molecule segment accounted for the largest share of the market. This is primarily because antibody-drug conjugates are the most clinically established and commercially advanced class within targeted conjugates, with continued technological progress improving outcomes across multiple tumor types.

“North America is growing at the highest CAGR in the next generation drug conjugates market from 2026 to 2035.”

The next generation drug conjugates market is segmented into North America, Europe, Asia Pacific, Latin America, the Middle East and Africa. During the forecast period, the North American region is estimated to grow at the highest CAGR. This growth is expected to be supported by the region's strong concentration of biopharmaceutical innovation, early adoption of advanced targeted therapies and the presence of key market participants, such as Novartis, Pfizer and Alnylam, actively developing and commercializing next generation drug conjugates.

The primary interviews conducted for this report can be categorized as follows:

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

By Company Type: Tier 1 - 40%, Tier 2 - 30%, and Tier 3 - 30%

By Designation: CXOs and Directors - 30%, Managers - 45%, and Others - 25%

By Region: North America - 40%, Europe - 25%, Asia Pacific - 20%, Latin America - 10%, and the Middle East - 5%

List of Companies Profiled in the Report

Alnylam Pharmaceuticals

Gilead Sciences, Inc.

Novartis AG

AstraZeneca

Daiichi Sankyo Company, Limited

Ionis Pharmaceuticals, Inc.

Rakuten Group

Novo Nordisk

ADC Therapeutics SA

Sanofi

Arrowhead Pharmaceuticals

Abbvie

Regeneron Pharmaceuticals, Inc.

Bicycle therapeutics

Avidity Biosciences

Silence Therapeutics

MediLink Therapeutics

SystImmune, Inc.

Actinium Pharmaceuticals

Alphamab Oncology

Fusion Pharma

Orano group

PepGen Inc

Tubulis GmbH

Clarity Pharmaceuticals

Research Coverage

This research report categorizes the next generation drug conjugates market by product (Enhertu [fam-trastuzumab deruxtecan-nxki], Pluvicto [lutetium Lu 177 vipivotide tetraxetan], AMVUTTRA [vutrisiran], TRODELVY [sacituzumab govitecan-hziy], Sacituzumab tirumotecan, Patritumab Deruxtecan [HER3-DXd], 225Ac-PSMA-617, other commercialized products and other pipeline products); by type: antibody-small molecule drug conjugate, ligand-oligonucleotide conjugate, small molecule-radionuclide conjugate, peptide-radionuclide conjugate, and other conjugate types; by targeting ligand: antibody, amino sugar, small molecule and peptide; by payload type: small molecule, oligonucleotide, and radionuclide; by indications: breast cancer, prostate cancer, hATTR with polyneuropathy, primary hyperlipidemia and other indications; and by region (North America, Europe, Asia Pacific, Latin America, Middle East, Africa).

The scope of the report covers detailed information regarding the major factors, such as drivers, challenges, opportunities, and restraints, influencing the growth of the next generation drug conjugates market. A detailed analysis of the key industry players has been done to provide insights into their business overview, product portfolio, key strategies such as product approvals and launches, collaborations, partnerships, expansions, agreements, and recent developments associated with the next generation drug conjugates market. Competitive analysis of top players and upcoming startups in the next generation drug conjugates market ecosystem is covered in this report.

Key Benefits of Buying the Report

The report will help market leaders/new entrants by providing them with the closest approximations of the revenue numbers for the overall next generation drug conjugates market and its subsegments. It will also help stakeholders better understand the competitive landscape and gain more insights to better position their business 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 into the following pointers:

Analysis of key drivers (increasing clinical success and regulatory approvals of antibody-drug conjugates, technological advancements in linker chemistry and payload development), restraints (high development and manufacturing costs associated with complex biologics), opportunities (expansion of drug conjugates into non-oncology therapeutic areas) and challenges (complex clinical trial design and patient selection requirements) are influencing the growth of next generation drug conjugates market

Product Development/Innovation: Detailed insights on newly launched products of the next generation drug conjugates market

Market Development: Comprehensive information about lucrative markets – the report analyses the next generation drug conjugates market across varied regions

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the next generation drug conjugates market

Competitive Assessment: In-depth assessment of market shares, growth strategies, and product offerings of leading players include Alnylam Pharmaceuticals (US), Gilead Sciences, Inc. (US), Novartis AG (Switzerland), AstraZeneca (UK), Daiichi Sankyo Company, Limited (Japan), Ionis Pharmaceuticals, Inc. (US), among others in the next generation drug conjugates market

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