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ADC Contract Manufacturing Market (5th Edition) by Phase of Development (Phase I, Phase II and Phase III), Scale of Operation (Clinical and Commercial), Type of Component Manufacturing (Antibody Manufacturing, HPAPI / Cytotoxic Payload, Linker and Conjugation Manufacturing, and Fill / Finish), Target Indications (Solid Tumors, Hematological Malignancies and Others), Type of Payload (Maytansinoid, Auristatin, Camptothecin, PBD and Others), Type of Linker (SMCC, VC, Malemide, Peptide Linker and Others), Type of Antibody Origin (Humanized, Chimeric, Murine, Human and Others), Antibody Isotype (IgG1and Others) and Geography (North America, Europe, Asia-Pacific and Rest of the World), 2022-2035

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Abstracts

The ADC contract manufacturing market is expected to reach USD 2.8 billion by 2022 anticipated to grow at a CAGR of 11.8% during the forecast period 2022-2035.

Over the past two decades, antibody therapeutics have emerged as a crucial component in the treatment of diverse diseases, particularly cancer, within the pharmaceutical industry. This sector has experienced rapid expansion, marked by substantial technological advancements. Researchers are actively exploring the

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potential of antibody drug conjugates (ADCs) in addressing a wide spectrum of conditions. ADCs offer distinct advantages compared to standard antibody treatments, including enhanced efficacy, greater stability, reduced toxicity, improved tumor targeting, increased drug tolerance, and minimized systemic exposure. Notably, the FDA has approved more than 10 ADCs in recent years, with over 700 clinical trials underway for various disorders. Investments totaling USD 14.8 billion since 2014 underscore the escalating interest and therapeutic potential of these precisely targeted medications. However, the production of these therapeutics presents challenges. These encompass the generation of antibody aggregates, management of drug/linker side reactions, handling of highly toxic compounds, and ensuring consistency in drug-antibody ratios across production batches. Furthermore, the manufacturing process often relies on costly linker technologies. To address these challenges, approximately 70-80% of ADC contract manufacturing is outsourced to specialized organizations possessing requisite expertise. The landscape of ADC contract manufacturing encompasses a blend of start-ups, mid-sized firms, and established players. More than a third of these entities operate across multiple geographical locations, offering diverse services at varying scales.

In response to the escalating demands of ADC developers, Contract Manufacturing Organizations (CMOs) engaged in ADC contract manufacturing are broadening their capacities to evolve into comprehensive service providers. With the anticipated surge in demand for ADCs, the associated contract manufacturing market is poised for substantial growth in the projected period.

Report Coverage

Analyze the ADC (Antibody-Drug Conjugate) contract manufacturing market by considering phases of development, operational scale, component manufacturing types, targeted indications, payload types, linker types, antibody origin, antibody isotype, and geographical factors.

Evaluate factors such as drivers, restraints, opportunities, and challenges that impact market growth.

Assess potential advantages and obstacles within the market, providing insights into the competitive landscape for leading players.

Forecast revenue for market segments across four major regions.

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Conduct a comprehensive market analysis of contract manufacturing entities in the ADC sector. Evaluate criteria including company size, establishment year, headquarters location, offered services (antibody manufacturing, HPAPI/payload synthesis, linker manufacturing, conjugation, and fill-finish), additional ADC services, operational scale (preclinical, clinical, commercial), and manufacturing facility locations.

Perform a competitive analysis of ADC manufacturers, focusing on strengths in manufacturing, services, and supplier aspects. Assess based on operational scale, service offerings, service diversity, facility locations, employee count, and industry experience.

Develop detailed profiles of selected ADC manufacturers based on competitiveness analysis, encompassing company overview, financial information, ADC manufacturing capabilities, facility locations, recent developments, and future outlook.

Analyze expansion initiatives of ADC contract manufacturing service providers between 2012-2022, evaluating expansion types, services offered, facility locations, operational scales, and active market players.

Investigate recent partnerships among ADC contract manufacturing entities, detailing partnership models (e.g., manufacturing agreements, acquisitions, licensing) and their nature, providing insights into collaborations between stakeholders.

Provide a qualitative analysis for ADC developers deciding between in-house manufacturing and outsourcing, highlighting factors influencing this decision-making process.

Outline the steps involved in ADC manufacturing (antibody, payload, linker, conjugation, fill-finish), including associated cost requirements for each stage.

Estimate global ADC manufacturing capacity across companies by size, geographical regions, and major players in bioconjugation.

Offer an overview of approved and under-development ADCs, including development phases, indications, antigens, antibody origins, isotypes, payload types, and linkers.

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Review the evolution of ADC conjugation technologies, focusing on past approaches, linker generations, and competition between technology platforms.

Analyze completed, ongoing, and planned clinical studies, considering parameters such as trial phase, status, indications, sponsors, and enrolled patients.

Estimate annual ADC product demand (in kilograms) considering commercial and clinical scale requirements based on patient population, dosing frequency, and approved and clinical stage candidates.

Analyze over 80 ADC-based therapy developers for potential partnerships with contract service providers, considering company size, experience, pipeline strength, and manufacturing capabilities.

Develop a regional capability assessment comparing key geographies based on ADC manufacturers, facilities, expansions, installed capacity, clinical trials, and regional demand.

Present a proprietary 2x2 representation depicting the current ADC market scenario, considering existing competition and growth opportunities across emerging and established market segments.

Discuss market trends, drivers, challenges, and opportunities using a SWOT framework with a Harvey ball analysis to highlight their relative impacts on the ADC contract manufacturing market.

Key Market Companies

MabPlex

AbbVie Contract Manufacturing

Lonza

Catalent Pharma Solutions

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Goodwin Biotechnology

Piramal Pharma Solutions

Millipore Sigma

Abzena

CARBOGEN AMCIS

WuXi Biologics

Cerbios-Pharma

Formosa Laboratories

Creative Biolabs

Novasep

Sterling Pharma Solutions

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24. APPENDIX II: LIST OF COMPANIES AND ORGANIZATIONS

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