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ADC Payload / Warheads Market: Distribution by Type of Product (Commercialized ADCs and Clinical ADCs), Type of Payload (Microtubule Inhibitors, DNA Damaging Agents, Topoisomerase Inhibitors and Others), Payload / Warhead (Auristatins, Calicheamicin, Camptothecin, Duocarmycin, Maytansinoids, Pyrrolobenzodiazepines and Others) and Geography (North America, Europe, Asia-Pacific and Rest of the World): Industry Trends and Global Forecasts, 2021-2035

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Abstracts

ADC Payload / Warheads Market: Distribution by Type of Product (Commercialized ADCs and Clinical ADCs), Type of Payload (Microtubule Inhibitors, DNA Damaging Agents, Topoisomerase Inhibitors and Others), Payload / Warhead (Auristatins, Calicheamicin, Camptothecin, Duocarmycin, Maytansinoids, Pyrrolobenzodiazepines and Others) and Geography (North America, Europe, Asia-Pacific and Rest of the World): Industry Trends and Global Forecasts, 2022-2035

Report Link: https://www.rootsanalysis.com/reports/adc-cytotoxic-payloads-market.html

The market for ADC payloads or warheads is currently estimated at $267 million in 2022 and is projected to growth with a CAGR of 12% in the forecast period.

With six approved drugs, including POLIVY™ (2019), LUMOXITI™ (2018), BESPONSA® (2017), MYLOTARG™ (2017, reapproval), KADCYLA® (2013), and ADCETRIS® (2011),

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and a pipeline featuring more than 300 candidates in clinical or preclinical stages, antibody-drug conjugates (ADCs) have emerged as a promising class of therapeutics for various disease indications. Over time, medical researchers have advanced their understanding of ADC design intricacies and streamlined the development process of these complex pharmacological interventions.

ADCs are engineered therapeutics composed of monoclonal antibodies linked to potent cytotoxic payloads via chemical connectors. Due to the high potency of ADCs' cytotoxic molecules, their manufacturing demands sophisticated technical capabilities and highly potent chemical substances. The multi-step production of cytotoxic payloads used in ADCs necessitates a controlled environment, specialized manufacturing facilities, dedicated analytical and purification techniques, and storage infrastructure. However, many ADC developers lack in-house capacity for commercial-scale manufacturing of cytotoxic payloads and, thus, rely on contract manufacturers. Estimates suggest that 70-80% of ADC manufacturing operations are outsourced.

Since 2000, various contract manufacturing organizations (CMOs) and contract development and manufacturing organizations (CDMOs) have emerged, offering services related to highly potent active pharmaceutical ingredients (HPAPI) and cytotoxic drugs to meet the rising demand for cytotoxic payloads in ADCs and similar therapeutic interventions. Additionally, numerous ADC developers have established strategic partnerships with payload providers to advance the development of ADC candidates in their pipelines. With the increasing number of ADCs in clinical development and ongoing technological advancements, the ADC payloads and warheads market is expected to witness significant growth throughout the forecast period.

Key Market Segments

Type of Product

Commercialized ADCs

Clinical ADCs

Type of Payload

Microtubule Inhibitors

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DNA Damaging Agents

Topoisomerase Inhibitors

Others

Payload / Warhead

Auristatins

Calicheamicin

Camptothecin

Duocarmycin

Maytansinoids

Pyrrolobenzodiazepines

Others

Geographical Regions

North America

Europe

Asia-Pacific

Rest of the World

Research Coverage:

The report studies the ADC payload or warheads market by type of product, type of payload, payload / warhead and geography.

The report analyzes factors (such as drivers, restraints, opportunities, and challenges) affecting the market growth.

The report assesses the potential advantages and obstacles within the market for those involved and offers information on the competitive environment for top players in the market.

The report forecasts the revenue of market segments with respect to major regions.

An overview of key findings from our research on the ADC payload or warheads market, offering insights into its current state and likely evolution in the short, mid, and long term.

An examination of the comprehensive market landscape encompassing companies specializing in ADC payloads and warheads, with a detailed analysis based on payload type, microtubule inhibitors, DNA damaging agents, and topoisomerase inhibitors. Additionally, it includes information regarding the establishment year, headquarters location, and company size of these developers.

Comprehensive profiles of entities engaged in the production of ADC payloads and warheads, each profile providing a succinct overview of the company, facility location, available financial information (if applicable), recent advancements, and a well-informed outlook for the future.

An assessment of the partnerships formed within the ADC payload and warheads market since 2016, covering various types of agreements, including licensing, research and development, mergers/acquisitions, manufacturing/supply, product development, service alliances, and commercialization agreements.

An analysis of investments made in companies dedicated to the development of ADC payloads and warheads, considering various stages of development, including seed funding, venture capital financing, debt funding, grants, capital raised from IPOs, and subsequent offerings.

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An overview of expansions undertaken by companies involved in ADC payload and warhead development to enhance their offerings. The analysis considers parameters such as the year of expansion, type of expansion (capacity, facility, or new facility), location of the facility, and the key players involved.

An in-depth analysis of patents related to ADC payloads and warheads, highlighting trends across parameters including publication year, patent type, geographical location, issuing authority, assigned CPC symbols, emerging focus areas, and leading industry players (based on the size of their intellectual property portfolio). The analysis also includes patent benchmarking and detailed valuation.

An educated estimate of the annual clinical/commercial demand for ADC payloads and warheads (measured in kilograms), considering factors such as the target patient population, dosing frequency, and dose strength of approved products and clinical-stage candidates.

A case study on ADCs, both approved and under development (clinical and preclinical). It provides information on their development phase, therapeutic area, line of treatment, dosing regimen, target antigen, antibody isotype, linker type, payload/warhead type, and payload category. Additionally, it offers details on ADC developers, including their founding year, company size, and geographical location, with a focus on key players in the industry.

A case study on the ADC contract manufacturing market, highlighting a list of contract service providers and in-house manufacturers currently active in this space. The chapter reviews companies offering contract services for ADC manufacturing, including the type of services provided, additional services, scale of operation (preclinical, clinical, and commercial), and the location of their manufacturing facilities.

Key Benefits of Buying this Report

The report offers market leaders and newcomers valuable insights into revenue estimations for both the overall market and its sub-segments.

Stakeholders can utilize the report to enhance their understanding of the competitive landscape, allowing for improved business positioning and more

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effective go-to-market strategies.

The report provides stakeholders with a pulse on the ADC payload / warheads market, furnishing them with essential information on significant market drivers, barriers, opportunities, and challenges.

You will get access to complimentary PPT insights and excel data packs / dynamic dashboards to easily navigate through complex analyses / charts.

Key Market Companies

Abzena, MabPlex

Levena Biopharma

NJ Bio

Novasep

STA Pharmaceutical (a subsidiary of WuXi AppTec)

Synaffix

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