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The Next Generation Drug Conjugates Market: Focus on GalNac Conjugate, Peptide Drug Conjugate, Peptide Oligonucleotide Conjugate, RNAi Conjugate, Peptide Receptor Radionuclide Therapy, Small Molecule-Drug Conjugate (SMDC), and Other Conjugates – Distribution by Type of Targeting Ligand (Amino Sugar, Lipid, Peptide, Small Molecule and Virus-like Particles), Type of Payload (Peptide, Small Molecule, Oligonucleotide and Radionuclide), Type of Therapy (Monotherapy and Combination Therapy), Route of Administration (Intravenous, Subcutaneous and Others), Mechanism of Action (sequence-specific target binding, radiation induced cytotoxicity, cancer-specific surface target mediated cytotoxicity, drug induced cytotoxicity, receptor mediated internalization and cytotoxicity and others) and Key Target Indications (Gastroenteropancreatic Neuroendocrine Tumors, Prostate Cancer, Leptomeningeal Carcinomatosis caused by Breast Cancer Brain Metastases, Hereditary Transthyretin Amyloidosis, Atherosclerotic Cardiovascular Diseases, Severe Hypertriglyceridemia, Hereditary Angioedema, Acute Hepatic Porphyria, Primary Hyperoxaluria, Heterozygous Familial Hypercholesterolemia, Hemophilia, Low-Risk Myelodysplastic Syndrome, Myelofibrosis, Alpha-1 Antitrypsin Deficiency Liver

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Disease and Familial Chylomicronemia Syndrome) and Key Geographical Regions (North America, Europe, Asia-Pacific and Rest of the World): Industry Trends and Global Forecasts, 2023-2035

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Abstracts

The global next generation drug conjugate market is anticipated to be valued at USD 15.47 billion in 2035 anticipated to grow at a CAGR of 18% during the forecast period 2023-2035.

The next generation drug conjugates, distinguished by reduced immune reactions, improved clinical traits, stable structures, minimized side effects, precise treatment delivery, enhanced cell penetration, and permeability, shows promise in tackling rare diseases, particularly cancers. In 2020, US rare disease medical expenses surged to nearly USD 1 trillion, with patients spending an average of USD 60,248—twice the amount for general patients. This escalating healthcare cost, coupled with the global burden of rare diseases, has prompted stakeholders to explore alternatives, and these advanced drug conjugates emerge as a hopeful solution.

Similar to antibody drug conjugates (ADCs), these advanced versions boast superior clinical efficacy and stability while employing diverse non-antibody targeting agents such as peptides, amino sugars, lipids, and small molecules. Instead of traditional drugs, they utilize payloads like oligonucleotides, antisense oligonucleotides, si-RNA, drugs, and radionuclides for targeted delivery. This fusion of targeting ligands and payloads has spawned various types of next generation drug conjugates, including peptide drug conjugates, peptide receptor radionuclide therapy, GalNac conjugates, si-RNA conjugates, all proving effective against diseases like solid tumors, metabolic disorders, and hematological disorders.

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The USFDA has greenlit six next generation drug conjugates for therapeutic use—Lutathera®, Pluvicto®, Givlaari®, Oxlumo®, Leqvio®, and Amvuttra®. These approvals underscore the clinical triumphs of these advanced therapies and their potential across a wide range of medical conditions. With ongoing innovation, promising trial outcomes, expedited approvals, and collaborative efforts, the market for next generation drug conjugates anticipates significant growth in the forecast period.

Report Coverage

An executive summary of the key insights captured during our research, offering a high-level view on the current state of the next generation drug conjugates market and its likely evolution in the short to mid and long term.

A general overview of the next generation drug conjugates, highlighting their historical background, as well as information on their structure, advantages, and the pharmacokinetic properties of the various next generation drug conjugates, such as GalNac conjugates, peptide drug conjugates and others.

Information on more than 200 next generation drug conjugates / next generation targeted therapeutics that are either approved or being evaluated in different stages of development (clinical or pre-clinical), based on several relevant parameters, such as type of conjugate (GalNac conjugate, peptide drug conjugate, peptide oligonucleotide conjugate, RNAi conjugate, peptide radionuclide conjugate, small molecule drug conjugate, and other conjugates), type of targeting ligand (amino sugar, lipid, peptide, small molecule and virus-like particles), type of payload, type of biological target, mechanism of action (sequence-specific target binding, radiation induced cytotoxicity, cancer-specific surface target mediated cytotoxicity, drug induced cytotoxicity, receptor mediated internalization and cytotoxicity and others), stage of development (preclinical, clinical and approved), phase of development (approved, phase III, phase II, phase I, preclinical and discovery), type of therapy (monotherapy and combination therapy), route of administration (intravenous, subcutaneous and others), target disease indication (muscular dystrophy, lung cancer, hepatitis, breast cancer, nonalcoholic steatohepatitis, prostate cancer, ovarian cancer, hypertension and hypertriglycedermia), therapeutic area (cardiovascular disorders, genetic disorders, hepatic disorders, metabolic disorders, musculoskeletal disorders, oncological disorders, respiratory disorders, renal disorders, and other disorders) and target population (children, adults and older adults). In addition, the chapter features information on various next generation

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drug conjugate developers, based on their year of establishment, company size, location of headquarters and most active players (in terms of number of drug candidates).

Elaborated profiles of leading next generation drug conjugate companies (shortlisted based on number of drug candidates in pipeline that have been approved / commercialized or in Phase III of development) and their respective product portfolios. Each profile features a brief overview of the company, product portfolio, an overview of the drug candidates which are either approved or are in phase III stage of clinical development, along with recent developments, and an informed future outlook of the developer.

An in-depth analysis of completed, ongoing, and planned clinical studies of various next generation drug conjugates, based on several relevant parameters, such as trial registration year, trial phase, enrolled patient population, type of sponsor / collaborator, age group, most active industry players, leading drug candidate, primary purpose, therapeutic area and key geographical regions.

An in-depth analysis of partnerships that have been inked between various stakeholders since 2018, covering product development and commercialization agreement, research and development agreement, service agreement, platform / technology licensing agreement, acquisition, clinical trial agreement, product licensing agreement, joint ventures and others.

Grants that have been awarded to research institutes engaged in conducting research related to next generation drug conjugates, since 2018, based on various important parameters, such as year of grant award, amount awarded, funding institute center, support period, type of grant application, purpose of grant award, activity code, study section involved, popular NIH departments (based on number of grants awarded), prominent program officers, leading recipient organizations and key regions.

An in-depth analysis of more than 400 peer-reviewed, scientific articles focused on next generation drug conjugates that have been published since 2018, based on year of publication, type of publication, number of publications, type of conjugate, target indication and copyright holders. The chapter also highlights the leading publishers and key journals (in terms of number of articles published and impact factor).

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A comprehensive analysis of the next generation drug conjugates that failed to progress to later stages of clinical development, based on various relevant parameters, such as trial status of discontinuation, trial phase of discontinuation, average trial year, type of therapy, target indication and reason for drug failure.

Insightful success protocol analysis of recently approved and commercialized next generation drug conjugates, based on several relevant parameters, such as dosing frequency, drug efficacy, drug exclusivity, drug designation, fatality rate, geographical reach, intra-class competition, line of treatment, prevalence, price, type of therapy, and existing competition among developers.

An elaborate market forecast analysis, highlighting the likely growth of the next generation drug conjugates market, till the year 2035. In order to provide details on future opportunity, our projections have been segmented on the basis of type of conjugate (peptide receptor radionuclide therapy, ligand mediated RNAi conjugates, ligand conjugates anti sense medicine and peptide drug conjugates), key target indications (gastroenteropancreatic neuroendocrine tumors, prostate cancer, leptomeningeal carcinomatosis caused by breast cancer brain metastases, hereditary transthyretin amyloidosis, atherosclerotic cardiovascular diseases, severe hypertriglyceridemia, hereditary angioedema, acute hepatic porphyria, primary hyperoxaluria, heterozygous familial hypercholesterolemia, hemophilia, low-risk myelodysplastic syndrome, myelofibrosis, alpha-1 antitrypsin deficiency liver disease and familial chylomicronemia syndrome), and key geographical regions (North America, Europe, Asia-Pacific, and Rest of the World).

Key Market Companies

Advanced Accelerator Applications

Alnylam Pharmaceuticals

Arrowhead Pharmaceuticals

Dicerna Pharmaceuticals

Geron Corporation

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Ionis Pharmaceuticals

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