

Antibody Discovery Market Size and Forecasts (2020 - 2030), Global and Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Antibody Type (Monoclonal Antibodies, Polyclonal Antibodies, and Others), Nature (Human and Humanized, Chimeric, and Murine), Service (Phage Display, Hybridoma, Transgenic Animal, Single Cell, and Yeast Display), End User (Pharmaceutical and Biotechnology Companies, Research Laboratories, and Others), and Geography (North America, Europe, Asia Pacific, South & Central America, and Middle East & Africa)

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Abstracts

The antibody discovery market size is projected to surge from US\$ 2.94 billion in 2022 to US\$ 4.92 billion by 2030; the market is estimated to record a CAGR of 6.7% during 2022–2030. The increasing investments in research & development and the rising incidence of cancer propel the antibody discovery market growth.

The expansion of biopharmaceutical industry, which is highly focused on biologics, results in a higher demand for antibody research services than before. Increased collaborations between industry players and academic institutions facilitate resource sharing and accelerated antibody discovery. The shift toward patient-centered drug development, emphasizing personalized medicine and patient preferences, boosts the antibody discovery market.

Continued technological advancements such as high-throughput screening, phage display, and next-generation sequencing have resulted in improved efficiency and speed of antibody discovery processes. Increased funding for research and development activities from government organizations and private companies also spurs antibody discovery initiatives. Monoclonal antibodies are gaining popularity in therapeutic applications due to their specificity and effectiveness in targeting specific antigens, resulting in increased demand for antibody research services. Therefore, the growing demand for antibody-based therapies and the preference for outsourcing are likely to have a significant impact on the antibody discovery market forecast in the next few years.

Rising Incidence of Cancer Drives the Antibody Discovery Market

As per the Global Cancer Observatory (GLOBOCAN) estimates published in 2020, there were 19.3 million cancer cases across the world. The number of cases was significantly high in the US, China, and India. The GLOBOCAN further estimates that cancer cases in India would reach ~2.08 million by 2040, representing a rise of 57.5% from 2020. Similarly, as per the World Health Organization (WHO) data published in February 2022, ~10 million people have died from cancer worldwide. As per a report by the American Cancer Society, ~16.9 million individuals with a history of cancer have been residing in the US since January 2019. By January 2030, the population of cancer survivors is estimated to reach 22.1 million, which can be primarily associated with the aging of the population. Lung, breast, colorectal, prostate, and breast are among the most commonly reported cancer types. The rising incidences of cancer have raised concerns worldwide. Below is the list of common cancer cases reported worldwide in 2020.

Table 1. New Cancer Cases Worldwide, in 2020

Sr. No. Cancer Type Number of Cases (Million)

1 Stomach 1.09

2 Skin (non-melanoma) 1.2

3 Prostate 1.41

4 Colon and rectum 1.93

5 Lung 2.21

6 Breast 2.26

Source: World Health Organization, February 2020

Cancer is now a lifestyle disease commonly seen among people with unhealthy eating habits and those who don't engage much in physical activities. The frequent consumption of alcohol and tobacco adds to the risk of developing this condition. Chronic infectious diseases in low- and middle-income countries can further aggravate the cancer risk factors. An upsurge in the incidence of cancer indicates the need for innovative cancer treatments. Monoclonal antibodies represent a promising class of targeted anticancer agents that enhance the natural ability of immune systems to suppress cancer cell activity and eliminate cancer cells. Antibody–drug conjugates (ADCs) have also shown promising results in cancer treatment. Further, progress in modern biotechnology allows researchers and companies to provide well-designed novel antibodies, paving the way for successful treatments of various types of cancer. Thus, the burgeoning incidence of different types of cancer boosts the antibody discovery market growth.

Market Trend

Developments for Custom Antibodies

Antibodies are indispensable research tools that enable researchers in various scientific fields to specify, identify, localize, and quantify their protein targets. Advancements in medical technologies provide support for faster and highly efficient discoveries of antibodies that are customized as per the customers' requirements. Integrating bioinformatics in the discovery of antibodies has triggered improvements in custom antibody research. Artificial intelligence (AI) has the potential to emerge as an essential, value addition tool in the discovery of custom antibodies. AI and machine learning (ML) algorithms analyze large data sets, predict antibody–antigen interactions, and optimize antibody properties. These techniques can also aid in design, screening, and lead optimization; identify patterns; predict binding affinities; and prioritize antibody candidates for further characterization. The use of AI and ML is driven by the growing availability of big data analytics solutions and advancements in computing power, in addition to the need to efficiently analyze and interpret large-scale antibody screening data. The integration of AI and ML technologies has the potential to improve the

success rates of antibody discovery projects and facilitate the development of more effective therapeutic antibodies.

The use of custom monoclonal antibodies is an attractive area in oncology research. Most of the clinical trials are performed using monoclonal antibodies derived from rabbits. For instance, anti-VEGF, a humanized anti-vascular growth endothelial factor (rabbit mAb), is currently under clinical studies for the evaluation of its effects on metastatic colorectal cancer and other solid tumors. Likewise, anti-VEGF is under clinical studies to treat age-related macular degeneration. Monoclonal antibodies derived from rabbits are proven to be a superior alternative to mouse-derived monoclonal antibodies due to a larger complementarity-determining region (CDR) in the antigen-binding site. In addition, monoclonal antibodies can be used to produce higher affinity clones. For instance, Creative Biolabs offers various custom polyclonal and monoclonal antibody production services, from gene expression or peptide synthesis to antibody purification and labeling. Therefore, custom monoclonal antibodies are likely to emerge as a profitable trend in the antibody discovery market during the forecast period.

The “Global Antibody Discovery Market” is segmented on the basis of antibody type, nature, services, end user, and geography.

Antibody Type-Based Insights

Based on product type, the antibody discovery market is segmented into monoclonal antibodies, polyclonal antibodies, and others. The monoclonal antibodies segment held a larger market share in 2022. The same segment is anticipated to register a higher CAGR of 6.9% during the forecast period.

Monoclonal antibodies (mAbs) are designed to interact specifically with diseased cells without harming healthy cells. Cancer therapy is one of the significant application areas wherein monoclonal antibodies are used. These are widely accepted biologics and are expected to present high-value opportunities to pharmaceutical manufacturers during the forecast period. Moreover, awareness about the applications of mAb therapies is increasing notably among patients and physicians. As a result, the approval of blockbuster mAbs for the treatment of various indications is expected to favor the antibody discovery market growth during the forecast period. Several drugs such as Avastin, Herceptin, Remicade, and Rituxan have been approved by the FDA for cancer, rheumatoid arthritis, Crohn's disease, ulcerative colitis, etc.

End User-Based Insights

Based on end users, the antibody discovery market is segmented into pharmaceutical and biotechnology companies, research laboratories, and others. The pharmaceutical and biotechnology companies segment held the largest antibody discovery market share in 2022, and the same segment is anticipated to register a higher CAGR of 7.2% during 2022–2030.

Pharmaceutical and biotechnology companies account for a significant part of the antibody discovery process because of their capabilities to identify antibodies for any specific disease and produce them on commercial scales. The elevating demand for high-specificity antibodies for drug discovery and development; growing research in the areas of proteomics and genomics; increasing need for antibodies for identifying new targets and assays; and rising R&D activities in several therapeutic areas such as cancer, HIV/AIDS, immunodeficiency diseases, and blood disorders are the critical factors driving the demand for antibody discovery products, solutions, and services in pharmaceutical and biotechnology companies.

US Food and Drug Administration, Centers for Disease Control and Prevention, Global Cancer Observatory, World Health Organization, Organization for Economic Co-operation and Development, Ministry of Health, Labour and Welfare, Ministry of Food and Drug Safety, Biomedical Advanced Research and Development Authority (BARDA) are some of the relevant sources referred while preparing the antibody discovery market research report.

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