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Antibody Drug Conjugates Market Size and Forecasts (2020 - 2030), Global and Regional Share, Trends, and Growth Opportunity Analysis Report Coverage: By Technology (Cleavable Linker and Non-Cleavable Linker), Application (Blood Cancer, Breast Cancer, Ovarian Cancer, Urothelial Cancer, and Others), Distribution Channel (Hospital Pharmacies, Retail Pharmacies, and Online Pharmacies), and Geography (North America, Europe, Asia Pacific, Middle East & Africa, and South & Central America)

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Abstracts

The global antibody drug conjugates market is expected to reach US$ 7.793 billion in 2022 to US$ 29.600 billion by 2030; the market is estimated to record a CAGR of 18.2% from 2022 to 2030.

The market growth of antibody drug conjugates is attributed to growing strategic partnerships to develop antibody drug conjugates, rising incidences of cancer cases, and increasing FDA approvals for ADCs. However, high cost of ADCs development and commercialization is hindering the market growth.

Growing Strategic Partnerships to Develop Antibody Drug Conjugates

Antibody–drug conjugates (ADCs) have received significant attention worldwide for cancer therapy. Since the approval of Mylotarg (Pfizer, Inc.’s first ADC) by the US Food and Drug Administration (FDA) in 2000, there has been substantial growth in strategic

decisions by pharmaceutical leaders despite the COVID-19 pandemic. In 2020, various pharmaceutical companies entered into partnerships to develop ADCs. For intance, in July 2020, AstraZeneca and Daiichi Sankyo collaborated to develop and commercialize DS-1062. DS-1602 is Daiichi Sankyo's proprietary trophoblast cell-surface antigen 2 (TROP2)-directed ADC to treat multiple tumor types.

Likewise, in December 2022, Merck & Co., Inc. (MSD) and Kelun-Biotech, a Sichuan Kelun Pharmaceutical Co., Ltd. subsidiary, partnered to develop seven investigational preclinical ADCs to treat cancer. Under the agreement, MSD received a grant for exclusive global licenses from Kelun Biotech to research, develop, manufacture, and commercialize multiple investigational preclinical ADC therapies. In addition, MSD has exclusive options to obtain additional licenses for ADC candidates. Whereas for Mainland China, Hing Kong, and Macau, Kelun-Biotech has retained its rights to research, develop, manufacture, and commercialize certain licensed and option ADCs.

Similarly, in April 2023, BioNTech SE and Duality Biologics (Suzhou) Co. Ltd signed a strategic partnership agreement to develop next-generation ADCs to treat cancer and autoimmune diseases. Under the partnership agreement, BioNTech SE will have access to DualityBio's lead candidate, DB-1303. DB-1303 is a topoisomerase-1 inhibitor-based ADC directed against Human Epidermal Growth Factor Receptor 2 (HER2). HER2 is an overexpressed common target in most cancer types and contributes to cancer cells' aggressive growth and spread. Secondly, BioNTech SE will have access to another topoisomerase-1 inhibitor-based ADC candidate, DB-1311. Companies have aimed to transform and commercialize innovative therapies worldwide.

Antibody Drug Conjugates Market: Segmental Overview

The antibody drug conjugates market is segmented on the basis of technology, application, distribution channel, and geography. Based on technology, the antibody drug conjugates market is bifurcated into cleavable linkers and non-cleavable linkers. In 2022, the cleavable linkers segment held a larger market share, and the non-cleavable linkers segment is estimated to register a faster CAGR during 2022–2030. Cleavable linkers use a chemical trigger or inherent properties of their structure to release the cytotoxic payload in the tumor cells. This technology uses pH sensitivity, glutathione sensitivity, and protease sensitivity mechanisms as chemical triggers. The cleavable linker technology is widely used in developing antibody-drug conjugates (ADCs). According to the article "Antibody–drug conjugates: Recent advances in linker chemistry," published in March 2021, over 80% of the approved ADCs are made using cleavable linker technology. Besponsa (inotuzumab ozogamicin) and Adcetris

(brentuximab vedotin) are two notable examples of ADCs synthesized using this technology. These ADCs remain comparatively stable for a long time in blood circulation after releasing hydrophilicity traceless payload. Moreover, cleavable linkers can release the payload intracellularly.

Based on application, the antibody drug conjugates market is segmented into blood cancer, breast cancer, ovarian cancer, urothelial cancer, and others. In 2022, the breast cancer segment held the largest market share, and is estimated to register the fastest CAGR of 18.6% during 2022–2030. The use of ADCs has significantly transformed how breast cancer treatment is planned. The development of ADCs is expected to improve the potency, precision, and safety of breast cancer therapeutics. At present, Kadcyla/T-DM1 (ado-trastuzumab emtansine), Enhertu/T-DXd (trastuzumab deruxtecan), and Trodelvy/SG (sacituzumab govetican) are the commercialized products available in the market to treat triple-negative breast cancer (TNBC) and metastatic breast cancer cases. According to the Breast Cancer Research Foundation data, published in January 2023, 17 ADCs are in clinical trials. 9 out of these are HER2-directed ADCs, which are being studied in different combinations of payloads. The remaining 8 ADCs are being studied in combination with novel antibody targets.

Antibody Drug Conjugates Market: Geographical Overview

North America holds the largest share of the antibody drug conjugates market. The antibody drug conjugates market in this region is split into the US, Canada, and Mexico. The market growth in the region is attributed to increasing research and development for ADCs, rising product approvals, growing awareness about ADCs, and rising number of mergers, collaborations, and partnerships among the operating players. In addition, significantly growing incidences of cancer are among the other leading factors escalating the demand for ADCs.

The US is the largest contributor to the antibody drug conjugates market in North America and the world. The highest numbers of ADCs are approved in the US. By January 2021, the US Food and Drug Administration (FDA) had approved Mylotarg, Lumoxiti, Adcetris, Kadcyla, Enhertu, Trodelvy, Besponsa, Polivy, Padcev, and Blenrep for several cancer indications. In addition, several ADCs are in the pipeline in the US. ADCs have been developed with strategies such as advanced conjugate technologies, more potent payloads, targeting novel antigens, and novel linkers. According to the FDA’s data published in May 2021, 113 clinical trials were in studies for 77 novel ADCs that targeted over 40 different targets. The growing list of ADCs in the pipeline is estimated to enhance the antibody drug conjugate market size in the country in the

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coming future.

In addition, growing partnerships among antibody drug conjugate market leader will expand their technologies in different regions enable market growth. In August 2023, ImmunoGen, Inc. and Takeda Pharmaceutical Company Limited collaborated to develop and commercialize ELAHERE, Immunogen's ADC therapy, in Japan. Under the collaboration agreement, ImmunoGen, Inc. receives upfront and additional payments upon conversion of FDA accelerated approval of ELAHERE to treat platinum-resistant ovarian cancer. If Takeda achieves certain regulatory and commercial milestones and double-digit royalties through the net sales of ELAHERE in Japan, it will pay an additional payment to ImmunoGen, Inc. Nevertheless, Immunogen has retained its exclusive production rights and will supply the product for development and commercialization in Japan. In return, Takeda will be responsible for all regulatory filing and have an exclusive license to develop and commercialize ELAHERE in Japan.

A few of the major primary and secondary sources referred to while preparing the ADC market report on the US Food and Drug Administration (FDA), Cancer.Net, EMA (European Medicines Agency), and Centers for Disease Control and Prevention (CDC).

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