

Asia Pacific Cell and Gene Therapy Contract Development and Manufacturing Organization Market Size and Forecast (2021 - 2031)

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Abstracts

The Asia Pacific Cell and Gene Therapy Contract Development and Manufacturing Organization (CDMO) market is poised for significant growth, with projections indicating it will reach approximately US\$ 8,140.2 million by 2031, up from US\$ 1,553.8 million in 2024. This growth trajectory reflects a remarkable compound annual growth rate (CAGR) of 26.9% from 2025 to 2031.

Executive Summary and Market Analysis

The market is categorized into several key regions, including China, Japan, India, South Korea, Australia, and the Rest of Asia Pacific. The expansion of this market is primarily fueled by a combination of robust infrastructure, supportive government policies, and an increasing number of CDMOs in the region. Countries such as China, Japan, and Singapore are making substantial investments in biotechnology, fostering an environment conducive to the development of cell and gene therapies. Furthermore, governments in these regions have implemented favorable regulatory frameworks aimed at expediting the approval processes for cell and gene therapies, which in turn encourages early-stage clinical trials and conditional approvals.

Strategic partnerships and a growing demand for advanced therapeutic solutions are also driving the market. The relatively lower costs associated with clinical trials and manufacturing in the Asia-Pacific region, coupled with access to large patient populations, make it an attractive destination for global biopharmaceutical companies seeking CDMO partners. The increasing presence of multinational pharmaceutical firms and their collaborations with regional CDMOs have led to rapid infrastructure development, including the establishment of state-of-the-art Good Manufacturing

Practice (GMP) facilities. Local CDMOs are also enhancing their capabilities to support the intricate production processes associated with cell and gene therapies, such as viral vector manufacturing, cell processing, and cryopreservation logistics.

Strategic Insights

Market Segmentation Analysis

The Asia Pacific CDMO market for cell and gene therapy is segmented by service type, product type, and end user.

By Service Type: The market is divided into Drug Development and Manufacturing, Testing and Regulatory Services, and Others. In 2024, Drug Development and Manufacturing is expected to hold the largest market share.

By Product Type: The market is categorized into Gene Therapy and Cell Therapy, with Gene Therapy anticipated to dominate the market share in 2024.

By End User: The market is segmented into Pharmaceutical Companies, Biopharmaceutical Companies, and Others, where Biopharmaceutical Companies are projected to hold the largest share in 2024.

Market Outlook

The increasing demand for cell and gene therapies is driving biopharmaceutical companies to seek out CDMOs that can provide advanced facilities and technologies necessary for scaling up production while ensuring compliance with quality and regulatory standards. The production of complex and personalized therapies necessitates specialized infrastructure capable of maintaining high manufacturing standards. This includes the production of viral vectors used in gene therapies, which requires GMP-compliant facilities to ensure the safety, consistency, and quality of the final products. These facilities must be equipped to handle complex biological materials, including live cells and genetically modified organisms, in controlled environments.

The adoption of automated cell culture systems, continuous manufacturing processes, and digital quality monitoring systems is enhancing the efficiency and growth of gene therapy production. The demand for specialized facilities presents a significant opportunity for CDMOs, as it is often more cost-effective for biopharmaceutical

companies to collaborate with CDMOs that possess the necessary technology and infrastructure. For example, in 2023, Bristol-Myers Squibb partnered with a CDMO for the production of its CAR-T cell therapy, Breyanzi, which involves harvesting, modifying, and expanding a patient's T-cells—a process that requires specialized technology and facilities to achieve the desired therapeutic outcomes. By leveraging the expertise of CDMOs, Bristol-Myers Squibb was able to scale production while ensuring compliance with regulatory standards and maintaining product quality.

Country Insights

The Asia Pacific CDMO market is further segmented by country, with China, Japan, India, Australia, South Korea, and the Rest of APAC being the primary regions. China is expected to hold the largest market share in 2024.

China is rapidly establishing itself as a global leader in cell and gene therapy manufacturing, supported by its robust infrastructure, favorable policies, and a growing number of CDMOs. Notable domestic CDMOs, such as WuXi Biologics and GenScript Biotech, are at the forefront of this growth, having developed comprehensive platforms for cell and gene therapy. WuXi Biologics, for instance, operates over 18 manufacturing sites worldwide, including several in China, and offers extensive services across the cell and gene therapy value chain. In 2021, the company launched its MFG5 facility in Wuxi, featuring a 60,000-liter single-use bioreactor capacity, highlighting China's capabilities in large-scale production.

GenScript Biotech has also made significant advancements in the sector, launching its CDMO segment, ProBio, and inaugurating China's largest commercial GMP plasmid manufacturing facility in December 2024. This facility, located in Zhenjiang, Jiangsu Province, spans 6,400 m² and provides comprehensive services from preclinical studies to commercial-scale production, supporting the rapid development of mRNA and viral vector-based therapies.

Company Profiles

Key players in the Asia Pacific CDMO market include Charles River Laboratories International Inc, Catalent Inc, Lonza Group AG, WuXi Biologics Inc, Pluri Inc, Aenova Holding GmbH, Takara Bio Inc, FUJIFILM Holdings Corp, AGC Biologics AS, Thermo Fisher Scientific Inc., Minaris Advanced Therapies, and SK pharmteco Inc. These companies are employing various strategies, including expansion, product innovation, and mergers and acquisitions, to enhance their market presence and offer innovative

solutions to their clients.

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