

# North America Antibody Drug Conjugates Market Forecast to 2030 - Regional Analysis - By Technology (Cleavable Linker and Non-cleavable Linker), Application (Blood Cancer, Breast Cancer, Ovarian Cancer, Urothelial Cancer, and Others), and Distribution Channel (Hospital Pharmacies, Retail Pharmacies, and Online Pharmacies)

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## Abstracts

The North America antibody drug conjugates market was valued at US\$ 3,659.81 million in 2022 and is expected to reach US\$ 13,681.58 million by 2030; it is estimated to grow at a CAGR of 17.9% from 2022 to 2030.

Increasing FDA Approvals for ADCs Fuels the North America Antibody Drug Conjugates Market

According to an article, An Insight into FDA Approved Antibody-Drug Conjugates for Cancer Therapy, published in the National Library of Medicine in September 2021, there were eight approvals for ADC in 2017, and it increased to 11 in September 2021. The FDA has approved a few more ADCs, including Lumoxiti, till the end of November 2022. Worldwide, more than 50 biopharmaceutical companies are involved in developing ADCs. The companies have targeted mainly blood cancer and other cancer types, such as lung, bladder, and gynecological tumors. Additionally, in June 2021, Evercore, a US-based Investment Banking and Evercore ISI, estimated that by 2030, the companies will sell ADCs for over US\$ 20 billion annually. The increasing approvals and commercialization of ADCs are leading to significant market growth. Below is a list of FDA-approved ADCs.

Table 1. List of FDA-Approved ADCs

Sr. No.	Company	Trade Name	ADC Drug	Cancer Type	Approval Year
1	Pfizer/Wyeth	Mylotarg	Gemtuzumab ozogamicin	Relapsed Acute Myelogenous	

### Leukemia (AML) 2000; 2017

2 Seagen Genetics, Millennium/Takeda Adcetris Brentuximab vedotin Relapsed HL and Relapsed sALCL 2011

3 Genentech, Roche Kadcyla Trastuzumab emtansine HER2-positive Metastatic Breast Cancer (mBC) 2013

4 Pfizer/Wyeth Beposona Inotuzumab ozogamicin Relapsed or Refractory CD22-positive B-cell Precursor Acute Lymphoblastic Leukemia 2017

5 Astrazeneca Lumoxiti Moxetumomab pasudotox Relapsed or refractory hairy cell leukaemia (HCL) in adults 2018

6 Genentech, Roche Polivy Polatuzumab vedotin-piiq Relapsed or refractory diffuse large B-cell lymphoma (DLBCL) 2019

7 Astellas/Seagen Genetics Padcev Enfortumab vedotin Metastatic urothelial cancer in adult who have received a PD-1 or PD-L1 inhibitor, and a Pt-containing therapy 2019

8 AstraZeneca/Daiichi Sankyo Enhertu Trastuzumab deruxtecan Metastatic HER2-positive breast cancer in adults, received two or more prior anti-HER2 based regimens 2019

9 Immunomedics Trodelvy Sacituzumab govitecan Metastatic triple-negative breast cancer (mTNBC) in adults, and patients received minimum two prior therapies for patients with relapsed or refractory metastatic disease 2020

10 GlaxoSmithKline (GSK) Blenrep Belantamab mafodotin-blmf Relapsed or refractory multiple myeloma in adults 2020, withdrawn on 22 Nov. 2022 in the US.

11 ADC Therapeutics Zynlonta Loncastuximab tesirine-lpyl Large B-cell lymphoma 2021

12 Seagen Inc Tivdak Tisotumab vedotin-tftv Recurrent or metastatic cervical cancer 2021

13 ImmunoGen Elahere Mirvetuximab soravtansine Platinum-resistant ovarian cancer 2022

### North America Antibody Drug Conjugates Market Overview

The antibody drug conjugates (ADCs) market in North America is analyzed based on 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.

Furthermore, growing partnerships among the companies to 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, Immunogens 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.

North America Antibody Drug Conjugates Market Revenue and Forecast to 2030 (US\$ Million)

North America Antibody Drug Conjugates Market Segmentation

The North America antibody drug conjugates market is segmented based on technology, application, distribution channel, and country.

Based on technology, the North America antibody drug conjugates market antibody drug conjugates market is bifurcated into cleavable linker and non-cleavable linker. The cleavable linker segment held a larger share in 2022.

Based on application, the North America antibody drug conjugates market antibody drug conjugates market is segmented into blood cancer, breast cancer, ovarian cancer, urothelial cancer, and others. The breast cancer segment held the largest share in 2022.

Based on distribution channel, the North America antibody drug conjugates market antibody drug conjugates market is segmented into hospital pharmacies, retail pharmacies, and online pharmacies. The hospital pharmacies segment held the largest share in 2022.

Based on country, the North America antibody drug conjugates market is categorized into US, Canada, and Mexico. The US dominated the North America antibody drug conjugates market in 2022.

ADC Therapeutics SA, Pfizer Inc, Hoffmann-La Roche Ltd, ImmunoGen, Inc, GSK Plc, Gilead Sciences Inc, AstraZeneca Plc, Astellas Pharma Inc, RemeGen Co Ltd, and Takeda Pharmaceutical Co Ltd are some of the leading companies operating in the North America antibody drug conjugates market.

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