

South & Central America Biopharmaceutical Contract Manufacturing Market Size and Forecast (2021 - 2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Product Type (Biologics and Biosimilar), Source (Microbial and Mammalian), Application (Commercial and Clinical), and Therapeutic Area (Oncology, Autoimmune Disorders, Respiratory Disorders, Metabolic Disorders, Neurology, Infectious Diseases, and Others)

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Abstracts

The South & Central America Biopharmaceutical Contract Manufacturing Market is poised for significant growth, with projections indicating an increase from US\$ 1,766.4 million in 2024 to US\$ 4,155.6 million by 2031. This growth represents a compound annual growth rate (CAGR) of 13.1% from 2025 to 2031, driven by several key factors. The region, which includes Brazil, Argentina, and other countries, is witnessing a surge in clinical trials, which is boosting the demand for contract manufacturing services. Pharmaceutical and biotechnology companies are increasingly seeking cost-effective and high-quality production solutions, making contract manufacturing organizations (CMOs) an attractive option. Brazil and Argentina are emerging as regional hubs for biopharmaceutical manufacturing, supported by robust healthcare infrastructure, a skilled workforce, and favorable regulatory environments.

The efficiency of clinical trials is improving due to the adoption of adaptive trial designs and digital health technologies, which help to reduce timelines and encourage investment in the region. Additionally, various government initiatives aimed at

enhancing local pharmaceutical capabilities, regulatory harmonization, and attracting foreign investments have created a conducive business environment. These factors position South & Central America as a competitive market for biopharmaceutical contract manufacturing.

Market Segmentation

The South & Central America Biopharmaceutical Contract Manufacturing Market can be segmented by product type, source, application, and therapeutic area:

By Product Type: The market is divided into Biologics and Biosimilars, with Biologics holding the largest market share in 2024.

By Source: The segmentation includes Microbial and Mammalian sources, where Microbial is expected to dominate the market.

By Application: The market is categorized into Commercial and Clinical applications, with Commercial applications leading in market share.

By Therapeutic Area: This includes Oncology, Autoimmune Disorders, Respiratory Disorders, Metabolic Disorders, Neurology, Infectious Diseases, and others, with Oncology being the largest segment in 2024.

Opportunities in Personalized Medicine

A significant opportunity in the market is the rise of personalized medicine, which tailors treatments to the unique genetic profiles and lifestyles of individual patients. The advancements in genomics, biotechnology, and diagnostics are facilitating the adoption of personalized medicine, leading to increased demand for specialized, flexible, and scalable manufacturing solutions. As biopharmaceutical companies develop personalized therapies, they are increasingly collaborating with CMOs that can provide the necessary expertise and capacity for these specialized manufacturing needs. For instance, in March 2024, Brazil's Fiocruz partnered with the U.S.-based nonprofit Caring Cross to enhance local manufacturing capabilities for CAR-T cell therapies and lentiviral vectors. This collaboration, which includes technology transfer and infrastructure development, is a significant step in improving Brazil's contract manufacturing capabilities for patient-specific treatments, addressing the growing demand for personalized medicine.

The trend towards personalized therapies necessitates efficient and adaptable manufacturing processes, particularly for cell-based therapies and gene-editing technologies like CRISPR. CMOs that can offer specialized services for these advanced

treatments are well-positioned to capitalize on the personalized medicine trend, as companies shift towards smaller batch sizes and more customized production.

Country Insights

The market is further segmented by country, with Brazil and Argentina being the primary players. Brazil is expected to maintain the largest market share in 2024. A notable development in Brazil's biopharmaceutical landscape was the agreement between Pfizer Inc. and BioNTech SE with Eurofarma Laboratórios SA to manufacture the COVID-19 mRNA vaccine, COMIRNATY. This collaboration highlights Brazil's growing role as a strategic manufacturing base for high-value biologics, particularly in response to the urgent need for localized vaccine production in Latin America.

Brazil's capabilities in advanced technologies, such as mRNA platforms, reinforce confidence in its manufacturing standards and regulatory environment. The opportunity lies in leveraging this momentum to expand contract development and manufacturing organization (CDMO) services beyond vaccines to include other complex biologics, such as monoclonal antibodies and biosimilars. With established infrastructure and a skilled workforce, Brazil is well-positioned to become the leading biopharmaceutical manufacturing and distribution hub in the region.

Key Players

Key players in the South & Central America Biopharmaceutical Contract Manufacturing Market include Boehringer Ingelheim International GmbH, Lonza Group AG, AbbVie Inc., Samsung Biologics Co., Ltd, WuXi Biologics Inc., Merck KGaA, Ajinomoto Co., Inc., Cytiva, and AGC Biologics AS. These companies are employing various strategies, including expansion, product innovation, and mergers and acquisitions, to enhance their market presence and offer innovative products to consumers.

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