Antibody Drug Conjugates Contract Manufacturing Market to Hit US$ 20.99 Bn by 2032: Persistence Market Research

The antibody drug conjugates contract manufacturing market is expanding, driven by rising cancer cases, targeted therapies, and growing CDMO partnerships

Antibody Drug Conjugates Contract Manufacturing Market

BRENTFORD, ENGLAND, UNITED KINGDOM, October 1, 2025 /EINPresswire.com/ -- The global antibody drug conjugates (ADCs) contract manufacturing market is experiencing significant growth. This expansion is driven by the increasing incidence of cancer worldwide, the growing demand for ADCs in cancer treatment, and the evolving challenges associated with the development and production of these targeted therapies. In 2025, the market size is expected to reach $9.26 billion, and by 2032, it is projected to grow to $20.99 billion, reflecting a compound annual growth rate (CAGR) of 12.4% during the forecast period from 2025 to 2032. This surge is underpinned by technological advancements in ADC manufacturing, regulatory support, and partnerships between pharmaceutical companies and Contract Development and Manufacturing Organizations (CDMOs) and Contract Manufacturing Organizations (CMOs).

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Key Industry Highlights

The ADC contract manufacturing market is poised for substantial growth, with several factors contributing to its upward trajectory. The growing incidence of cancer globally is one of the key drivers. According to the International Agency for Research on Cancer (IARC), there were an estimated 20 million new cancer cases and 9.7 million deaths in 2022. Moreover, the high demand for ADCs, which offer a more targeted approach to cancer treatment, is accelerating the need for specialized manufacturing capabilities. ADCs are a promising class of cancer

therapeutics that deliver chemotherapy agents directly to cancer cells while sparing healthy tissues, thus improving treatment outcomes and minimizing side effects compared to conventional chemotherapy.

The cleavable linker segment, which allows for targeted payload delivery and increased therapeutic efficacy, is expected to dominate the market, holding approximately 60% of the market share during the forecast period. Additionally, the Asia Pacific region is set to dominate the ADC contract manufacturing market, accounting for a significant share due to regulatory support, cost advantages, and a strong manufacturing ecosystem.

Market Dynamics

Drivers

The primary driver of the ADC contract manufacturing market is the increasing global cancer burden. As cancer rates continue to rise, especially among aging populations, there is a growing need for targeted therapies. ADCs offer the promise of precise treatment by delivering cytotoxic agents directly to cancer cells, minimizing collateral damage to healthy tissues. In countries like Japan and South Korea, where a significant portion of the population is aged 65 and older, the demand for ADCs is particularly strong.

In addition to the growing cancer burden, the rising demand for ADCs is fueled by advancements in R&D for personalized and precision medicine. Drug developers are increasingly relying on specialized CDMOs for the production of tailored ADCs that can address specific patient needs.

Restraints

Despite the positive growth prospects, the ADC contract manufacturing market faces certain challenges. One of the key restraints is the stringent regulatory environment governing the production of ADCs. In regions such as the European Union and the United States, CDMOs must comply with Good Manufacturing Practices (GMP) and other stringent regulatory standards. For instance, the European Medicines Agency (EMA) mandates the use of Grade A isolators for handling cytotoxic ADC payloads, a measure that significantly increases manufacturing costs. Similarly, the U.S. Food and Drug Administration (FDA) enforces rigorous documentation and quality systems, highlighting the shared responsibility between sponsors and CMOs/CDMOs for product quality.

Additionally, ADCs often involve potent and toxic substances, which require specialized containment and safety measures. These requirements can lead to significant investments in infrastructure, training, and quality control, increasing the overall cost of manufacturing.

Opportunities

The increasing focus on personalized medicine presents a significant opportunity for the ADC contract manufacturing market. Personalized medicine, which involves tailoring treatment to the individual characteristics of each patient, is becoming central to oncology treatment strategies. This demand for patient-specific therapies is driving the need for highly specialized ADC manufacturing processes.

Several pharmaceutical companies are collaborating with CDMOs to develop personalized ADC therapies. For example, ImmunoGen has partnered with Lonza to accelerate the development of personalized ADC candidates, while Seagen has partnered with Catalent to scale up production of its ADC therapies like Adcetris®. These collaborations underscore the growing need for contract manufacturing solutions that can meet stringent regulatory requirements and enable faster time-to-market.

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Category-wise Analysis

Linker Insights

By linker type, the cleavable linker segment is expected to dominate the market, holding approximately 60% of the market share during the forecast period. Cleavable linkers utilize the inherent properties of tumor cells to release payloads selectively at the target site. These linkers may also enhance the bystander effect, helping to destroy adjacent cancer cells. An example of an ADC with a cleavable linker is Adcetris® (brentuximab vedotin), which uses a Val-Cit linker to connect MMAE to an anti-CD30 monoclonal antibody.

The non-cleavable linker segment, however, is expected to witness the fastest growth. Non-cleavable linkers offer stability in systemic circulation, minimizing off-target toxicity. Payload release occurs only after the ADC is internalized and degraded within the lysosome. Kadcyla® (ado-trastuzumab emtansine), for instance, uses a non-cleavable linker to deliver the cytotoxic agent DM1 to HER2-positive breast cancer cells.

Condition Insights

By condition, the multiple myeloma segment is expected to dominate the ADC contract manufacturing market, accounting for about 55% of the total revenue in 2025. ADCs have shown significant promise in treating relapsed/refractory multiple myeloma, a disease that often becomes resistant to conventional therapies. An example of an ADC used in multiple myeloma is Blenrep® (belantamab mafodotin), developed by GSK, which targets BCMA (B-cell maturation antigen).

The lymphoma segment, on the other hand, is expected to be the fastest-growing. ADCs are

increasingly being adopted in the treatment of various lymphoma subtypes, including diffuse large B-cell lymphoma (DLBCL) and Hodgkin lymphoma. One of the key developments in this area is the commercial production of Zynlonta (loncastuximab tesirine) by Avid Bioservices, which targets CD19-positive B-cell malignancies.

Regional Insights

Asia Pacific

The Asia Pacific region is expected to dominate the ADC contract manufacturing market, with a market share of approximately 45% in 2025. Countries like China, South Korea, and India offer cost-effective manufacturing solutions, which makes the region an attractive hub for ADC production. China, in particular, is emerging as a significant player in the global ADC manufacturing landscape, with companies like WuXi Biologics investing heavily in large-scale bioreactor capacities and facilities dedicated to ADC production.

North America

North America is expected to witness the fastest growth in the ADC contract manufacturing market. The U.S. leads the region due to its early adoption of ADCs, numerous FDA approvals, and significant investments in advanced biomanufacturing capabilities. Companies such as Lonza, Catalent, and Merck are expanding their production capacities to meet the growing demand for ADCs. In August 2023, Pfizer announced a major investment to expand its biomanufacturing site in Kalamazoo, Michigan, to support the production of ADCs.

Europe

Europe is experiencing moderate growth, fueled by strong regulatory support, technological advancements in manufacturing, and a growing focus on precision oncology. Germany, in particular, is emerging as a key hub for ADC production, with major players like BioNTech and Lonza driving innovation in scalable manufacturing solutions.

Competitive Landscape

The ADC contract manufacturing market is highly competitive, with numerous global and domestic players vying for market share. Companies are increasingly focusing on R&D, product innovations, and strategic partnerships to expand their footprint in the market.

Key Players:

Sterling
Recipharm AB
Lonza

Catalent, Inc.
Sartorius AG
Wuxi Biologics
Samsung Biologics
Piramal Group (Piramal Pharma Solutions)
AbbVie, Inc. (AbbVie Contract Manufacturing)
Merck KGaA

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Key Industry Developments

In October 2024, Simtra BioPharma Solutions, a leading CDMO specializing in sterile injectables, announced a strategic investment of $14 million to enhance its ADC conjugation and purification capabilities. Similarly, in February 2024, Daiichi Sankyo announced a $1 billion investment in its manufacturing facility in Germany to significantly increase its ADC production capacity.

Market Segmentation

By Linker:

Cleavable
Non-cleavable

By Condition:

Myeloma
Lymphoma
Breast Cancer

By Phase:

Clinical
Commercial

By Region:

North America
Europe
Asia Pacific
South Asia and Oceania
Latin America
Middle East and Africa

The global antibody drug conjugates contract manufacturing market is set to experience robust growth over the next decade. Driven by increasing cancer rates, advancements in personalized medicine, and collaborations between pharmaceutical companies and CDMOs, the market is poised to continue its expansion. While regulatory challenges and infrastructure requirements pose certain restraints, the growing demand for targeted therapies presents significant opportunities for companies in the ADC manufacturing space. With technological advancements, strategic investments, and a focus on innovation, the future of the ADC contract manufacturing market looks promising.

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