Antibody-Drug Conjugates (ADCs)

ANMD-MRS9-089 · Advanced Therapeutics & Biomanufacturing

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US$

WHY THIS REPORT

Antibody-drug conjugates are the targeted-payload powerhouse of modern oncology — the cytotoxic, topoisomerase-inhibitor and site-specific conjugates that arm antibodies with potent drugs to kill tumour cells while sparing healthy tissue. This decision-grade study sizes the global market three ways — value, patients treated and production volume — across ADC type, linker type and application, across seven regions and four scenarios to 2032, with outlooks to 2050.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report's backbone, not an afterthought. Beyond efficacy, ADCs shape oncology access and the footprint and safety of high-containment manufacturing.

Mapped Sustainable Development Goals:

SDG 3	SDG 9	SDG 10	SDG 12	SDG 17
Good Health & Well-Being	Industry, Innovation & Infrastructure	Reduced Inequalities	Responsible Consumption	Partnerships for the Goals

Measurable sustainability outcomes assessed:

- Broadened oncology efficacy and access
- High-containment manufacturing safety and waste
- Occupational-exposure (OEL) management
- Equitable access and pricing as material risks

Framework alignment: Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

WHAT'S INSIDE AT A GLANCE

53 Chapters	**9** Report Parts	**7** Regions Covered	**40+** Country Markets
2025–32 Forecast Horizon	**4** Forward Scenarios	**20+** Companies Profiled	**5** SDGs Mapped

REPORT COVERAGE

Geographic scope: North America, Europe, Asia Pacific, Latin America, Africa, Middle East and Rest of World — with named country intelligence. Asia Pacific holds a category-defining position; North America leads value and dealflow; Europe and specialists add platform depth; other regions assessed on their own merits.

MARKET OVERVIEW

From cytotoxic conjugates to site-specific chemistry — where targeted payloads widen the therapeutic window.

ADCs are a high-growth, deal-heavy oncology class. Demand is driven by practice-changing approvals, expansion across tumour types, and advances in linker-payload and site-specific conjugation — with specialised HPAPI manufacturing central to supply. The market is read three ways — value, patients treated and production volume — and forecast under four scenarios, each region reported separately.

- **Asia Pacific holds a category-defining position** — Japan, anchored by topoisomerase-inhibitor ADCs that reshaped the field
- **North America leads value and dealflow** — United States, across approved and pipeline ADCs
- **Europe and specialists add platform depth** — United Kingdom, Switzerland and the Netherlands, advancing linker and conjugation technology
- **Linker-payload chemistry is the differentiator** — site-specific conjugation and novel payloads widen the therapeutic window

REGIONAL OUTLOOK

Across seven reporting regions, the report separates leading markets from high-growth and emerging ones — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Markets & Drivers
Asia Pacific	Category-defining	Japan — topoisomerase-inhibitor ADCs
North America	Value & dealflow leader	United States — approved & pipeline ADCs
Europe	Platform depth	UK, Switzerland, Netherlands — linker & conjugation tech
Latin America	Emerging	Brazil — oncology access
Africa	Frontier	South Africa — oncology access
Middle East	Emerging	Saudi Arabia, UAE — access & investment

KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
• Practice-changing oncology approvals	• Complex, specialised HPAPI manufacturing
• Next-gen linker & payload chemistry	• Toxicity & therapeutic-window management
• Site-specific conjugation advances	• High cost-of-goods & CDMO dependence
• Tumour-type & indication expansion	• Payload & linker IP complexity
• Intense licensing & M&A activity	• Manufacturing capacity constraints

SEGMENTATION SNAPSHOT

By ADC Type	Cytotoxic-payload · topoisomerase-inhibitor · site-specific · bispecific · immune-stimulating ADCs
By Linker Type	Cleavable · non-cleavable · site-specific
By Application	Oncology · rare / genetic disease · immunology & infectious disease
By End User	Hospitals · pharma / biotech · CDMOs · academia
By Manufacturing	In-house · CDMO (HPAPI)
By Business Model	Product sales · CDMO services · licensing

TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

Part V — Company, Competition, Patent and Project Intelligence

Part VI — Sustainability, ESG, SDG, Climate and Natural-Capital Intelligence

Part VII — Supply Chain, Policy, Legal, Economics and Finance

Part VIII — Scenario, Future Intelligence and Final Due Diligence Verdict

Part IX — Annexes, Directories and Reference Material

COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans ADC innovators, large-pharma acquirers and conjugation CDMOs. Deal activity — multi-billion-dollar licensing, acquisitions and CDMO partnerships — signals a market consolidating around differentiated linker-payload platforms and secured HPAPI capacity.

Representative players profiled in the full report:

Daiichi Sankyo Company, Limited · AstraZeneca PLC · Pfizer Inc. · Roche Holding AG · Gilead Sciences, Inc. · AbbVie Inc. · ADC Therapeutics SA · and further profiled players across innovators and conjugation CDMOs.

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a conditional investment view.

KEY QUESTIONS THIS REPORT ANSWERS

- How large is the global ADC market, and how fast will it grow to 2032?
- Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- How does linker-payload chemistry change the therapeutic window and value?
- Who leads, and where is the competitive and patent white space?
- Is the investment case bankable — and under what conditions?
- How does the category align with the SDGs, oncology access and manufacturing-safety expectations?

WHY ANMD — THE DIFFERENCE

Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate, water and natural-capital intelligence and a decision-ready bankability view in a single architecture.

- **Triangulated sizing** — every market read three ways so value, volume and the physical-unit views reconcile rather than conflict.
- **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear, conditional investment view.

WHO SHOULD BUY THIS REPORT

Investors, biopharma, CDMOs, hospitals, payers, regulators, lenders and policymakers, and strategic corporate planners and decision-makers.

Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at **www.anewmarketdynamics.com** · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at **www.anewmarketdynamics.com**. The full detailed table of contents will be sent directly to your registered company email address.