

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 Good Health & Well-Being	SDG 9 Industry, Innovation & Infrastructure	SDG 10 Reduced Inequalities	SDG 12 Responsible Consumption	SDG 17 Partnerships for the Goals
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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 • Next-gen linker & payload chemistry • Site-specific conjugation advances • Tumour-type & indication expansion • Intense licensing & M&A activity	• Complex, specialised HPAPI manufacturing • Toxicity & therapeutic-window management • High cost-of-goods & CDMO dependence • Payload & linker IP complexity • 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 I — Report Foundation, Discovery and Strategic Intelligence

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- › Chapter 3. Executive Intelligence and Decision Dashboard
- › Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

Part II — Market Intelligence, Sizing, Forecasting and Segmentation

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- › Chapter 6. Market Dynamics
- › Chapter 7. Global Market Size and Forecast, 2020–2032
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- › Chapter 48. Corporate Directory and Company Intelligence Annex
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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.