Bispecific Antibody Formats

ANMD-MRS9-088 · 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

Bispecific antibody formats are the engineered next generation of antibody therapeutics — the T-cell engagers (BiTE), IgG-like, fragment-based and tetravalent multispecifics that bind two targets at once to redirect immunity or block dual pathways. This decision-grade study sizes the global market three ways — value, patients treated and production volume — across format, mechanism 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, bispecifics shape access and the footprint of complex biologic manufacturing while extending treatment options.

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:

- Extended treatment options beyond monoclonals
- Equitable access and pricing implications
- Bioprocessing water and energy footprint
- Single-use waste and manufacturing footprint 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. North America leads value and pipeline; Europe holds franchise and format strength; Asia Pacific is scaling pipeline and access; other regions assessed on their own merits.

MARKET OVERVIEW

From monoclonal franchises to dual-target engineering — where one antibody reaches two targets at once.

Bispecifics are among the fastest-growing biologics classes. Demand is driven by T-cell-engager approvals in haematology, expansion into solid tumours and immunology, and format innovation balancing potency and tolerability. The market is read three ways — value, patients treated and production volume — and forecast under four scenarios, each region reported separately.

- **North America leads value and pipeline** — United States, anchoring T-cell engagers and IgG-like formats
- **Europe holds franchise and format strength** — Switzerland, Denmark and the Netherlands, on proprietary bispecific platforms
- **Asia Pacific is scaling pipeline and access** — China and Japan, as developers and manufacturing capacity expand
- **Format engineering is the differentiator** — balancing potency, half-life and tolerability across BiTE, IgG-like and fragment-based designs

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
North America	Value & pipeline leader	United States — T-cell engagers, IgG-like formats
Europe	Format-platform hub	Switzerland, Denmark, Netherlands — proprietary platforms
Asia Pacific	Scaling pipeline	China, Japan — developers & manufacturing
Latin America	Emerging	Brazil — expanding access
Africa	Frontier	South Africa — access programmes
Middle East	Emerging	Saudi Arabia, UAE — access & investment

KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
• T-cell-engager approvals & momentum • Expansion to solid tumours & immunology • Format & half-life engineering • Combination-therapy potential • Platform-licensing economics	• Manufacturing & stability complexity • Toxicity (CRS) & tolerability management • Short half-life of some formats • Pipeline crowding & differentiation • Pricing & reimbursement scrutiny

SEGMENTATION SNAPSHOT

By Format	T-cell engagers (BiTE) · IgG-like · fragment-based · tetravalent / multispecific · checkpoint bispecifics
By Mechanism	T-cell redirection · dual signalling blockade · receptor clustering
By Application	Oncology · rare / genetic disease · immunology & infectious disease
By End User	Hospitals · pharma / biotech · CDMOs · academia
By Stage	Approved · clinical · preclinical
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 large-cap biopharma and bispecific-platform specialists. Deal activity — platform licensing, pipeline acquisitions and combination strategies — signals a market consolidating around differentiated, tolerable bispecific formats.

Representative players profiled in the full report:

Roche Holding AG · Amgen Inc. · Johnson & Johnson · AbbVie Inc. · Regeneron Pharmaceuticals, Inc. · Genmab A/S · Xencor, Inc. · and further profiled players across large-cap biopharma and platform specialists.

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 bispecific antibody market, and how fast will it grow to 2032?
- Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- How does format engineering change value versus monoclonal franchises?
- 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, access and manufacturing-footprint 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.