Monoclonal Antibody Products

ANMD-MRS9-083 · 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

Monoclonal antibodies are the commercial heart of modern biologics — the fully human, humanized, chimeric and engineered IgG products that anchor oncology, immunology and infectious-disease franchises and generate a large share of biopharma revenue. This decision-grade study sizes the global market three ways — value, doses/patients treated and production volume — across antibody type, 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. Monoclonal antibodies deliver measurable disease-modifying treatment across oncology and immunology, while higher-potency engineering, manufacturing-cost discipline and biosimilar access strengthen the health-equity story.

Mapped Sustainable Development Goals:

SDG 3	SDG 9	SDG 10	SDG 12	SDG 17
Good Health	Industry & Innovation	Reduced Inequalities	Responsible Consumption	Partnerships for Goals

Measurable sustainability outcomes assessed:

- Disease-modifying treatment across major indications
- Higher-potency, engineered molecules
- Broader access as biosimilars expand
- Manufacturing energy, single-use plastics and supply-chain ESG 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	**25+** 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 is the value leader (United States) on pipeline depth and CDMO capacity; Europe is the technology leader (Germany, United Kingdom, Switzerland) on platforms and manufacturing; Asia Pacific is the scale engine; other regions assessed on their own merits.

MARKET OVERVIEW

From first-generation mAbs to engineered molecules — where biologics go Fc- and glyco-engineered and higher-potency.

Monoclonal antibodies are a mature but still-growing biologics core. Demand is driven by oncology and immunology expansion, new indications and engineering gains, against biosimilar erosion of older franchises and manufacturing-cost pressure. The market is read three ways — value, doses/patients treated and production volume — and forecast under four scenarios, each region reported separately.

- **North America is the value leader** — United States, on biologics revenue and pipeline depth
- **Europe is the technology leader** — Switzerland, Germany and United Kingdom, on antibody franchises
- **Asia Pacific is the scale engine** — China, Japan and South Korea, on biomanufacturing and biosimilars
- **Engineering is the differentiator** — Fc- and glyco-engineered, higher-potency molecules

REGIONAL OUTLOOK

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

Region	Stage	Lead Markets & Drivers
North America	Value leader	United States — pipeline depth, CDMO capacity, reimbursement
Europe	Technology leader	Germany, United Kingdom, Switzerland — platforms, manufacturing
Asia Pacific	Scale engine	China, Japan, South Korea — biomanufacturing, build-out
Middle East	High-growth	Saudi Arabia, Israel, UAE — biotech investment, access
Latin America	Emerging	Brazil, Mexico — biologics access, manufacturing
Africa	Emerging	South Africa, Egypt — access, local manufacturing

KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
• Oncology + immunology-expansion convergence	• Biosimilar erosion of mature franchises
• Indication-breadth & engineering value	• Manufacturing-cost & pricing pressure
• Policy & reimbursement support (biologics access)	• Regulatory & manufacturing-complexity burden
• Manufacturing-cost & yield discipline	• Single-use plastics & sustainability scrutiny
• Fc-, glyco-engineering & potency gains	• Reimbursement, access & affordability gaps

SEGMENTATION SNAPSHOT

By Antibody Type	Fully human · humanized · chimeric · Fc-engineered · glyco-engineered mAbs
By Mechanism	Antagonist / blocking · agonist · cell-depleting (ADCC/CDC)
By Application	Oncology · rare / genetic disease · immunology & infectious disease
By End User	Hospitals · pharma / biotech · CDMOs · academia
By Business Model	Product sales · CDMO services · licensing
By Production	In-house · CDMO-manufactured

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

- Chapter 1. Scope, Methodology and Report Architecture
- Chapter 2. Industry Discovery Summary — Monoclonal Antibody Products
- Chapter 3. Executive Intelligence and Decision Dashboard
- Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

Part II — Market Intelligence, Sizing, Forecasting and Segmentation

- Chapter 5. Industry Overview and Market Evolution
- Chapter 6. Market Dynamics
- Chapter 7. Global Market Size and Forecast, 2020–2032
- Chapter 8. Market Segmentation Analysis
- Chapter 9. End-User and Demand-Side Intelligence
- Chapter 10. Pricing, Cost and Commercial Model Intelligence

Part III — Regional and Country Intelligence

- Chapter 11. Global Regional Intelligence Framework
- Chapter 12. North America Market Intelligence
- Chapter 13. Europe Market Intelligence
- Chapter 14. Asia Pacific Market Intelligence
- Chapter 15. Latin America Market Intelligence
- Chapter 16. Africa Market Intelligence
- Chapter 17. Middle East Market Intelligence
- Chapter 18. Rest of World Market Intelligence

Part IV — Technology, Innovation and Category-Specific Intelligence

- Chapter 19. Technology Landscape and Architecture
- Chapter 20. Emerging and Next-Generation Technology Intelligence
- Chapter 21. Category-Specific Intelligence Module
- Chapter 22. Research, Innovation and Funding Landscape

Part V — Company, Competition, Patent and Project Intelligence

- Chapter 23. Competitive Landscape
- Chapter 24. Company Profiles
- Chapter 25. Mergers, Acquisitions, Partnerships and Ecosystem Intelligence
- Chapter 26. Patent Landscape and Intellectual Property Intelligence
- Chapter 27. Project, Deployment and Case-Study Intelligence

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

- Chapter 28. Sustainability Intelligence Suite
- Chapter 29. ESG Intelligence and Double Materiality
- Chapter 30. ESG and Sustainability Framework Alignment
- Chapter 31. SDG Intelligence
- Chapter 32. Carbon, Net-Zero and Climate-Mitigation Intelligence
- Chapter 33. Water, Biodiversity and Natural-Capital Intelligence
- Chapter 34. Circular Economy and Resource-Security Intelligence
- Chapter 35. Social Impact, Human Capital and Community Intelligence
- Chapter 36. Climate Risk, Adaptation and Resilience Intelligence

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

- Chapter 37. Value Chain, Supply Chain and Geopolitical Intelligence
- Chapter 38. Policy, Regulation and Incentive Intelligence
- Chapter 39. Legal, Contracting and Risk-Allocation Intelligence
- Chapter 40. Unit Economics, CAPEX, OPEX and Return Analysis
- Chapter 41. Investment, Sustainable Finance and Bankability Intelligence

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

- Chapter 42. Scenario Analysis and Future Intelligence
- Chapter 43. Sustainability Due Diligence Framework and Data-Room Index
- Chapter 44. Risk Register, RAG Rating and Anti-Greenwashing Screen
- Chapter 45. Bottom-Line Verdict and Strategic Recommendations
- Chapter 46. Implementation Roadmap and Stakeholder Playbooks

Part IX — Annexes, Directories and Reference Material

- Chapter 47. Methodology Annex
- Chapter 48. Corporate Directory and Company Intelligence Annex
- Chapter 49. Patent Directory and Patent Intelligence Annex
- Chapter 50. Project Intelligence Annex
- Chapter 51. Forecast Annex
- Chapter 52. Sustainability KPI Annex
- Chapter 53. Reference Annexes

COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans global biopharma majors, specialist monoclonal antibody products makers, and emerging innovators. Deal activity — M&A, technology acquisition and platform expansion — signals a market consolidating around scalable, scaled, GMP-ready platforms.

Representative players profiled in the full report:

F. Hoffmann-La Roche Ltd (Genentech, Inc.) · AbbVie Inc. · Johnson & Johnson · Merck & Co., Inc. · Bristol-Myers Squibb Company · Amgen Inc. · Novartis AG · and 20+ further profiled players across specialists, CDMOs and challengers and emerging innovators.

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a Go / No-Go / Conditional-Go investment verdict.

KEY QUESTIONS THIS REPORT ANSWERS

? How large is the global monoclonal antibody products market, and how fast will it grow to 2032?

? Which regions, countries and segments offer the strongest risk-adjusted opportunity?

? How do manufacturing cost, scalability and access change value versus incumbent therapies?

? 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, health-equity and patient-access and disclosure regulation?

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 verdict in a single architecture.

- **Triangulated sizing** — every market read three ways so value, volume and production-volume 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 Go / No-Go / Conditional-Go investment verdict.

WHO SHOULD BUY THIS REPORT

Investors and life-sciences / PE funds, pharma and biotech companies, CDMOs and CROs, hospitals and treatment centers, tools and consumable suppliers, payers and regulators, and corporate strategy and ESG teams, plus 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.