

Biopharmaceuticals Contract Manufacturing - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2021 - 2029

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Report description:

The Biopharmaceuticals Contract Manufacturing Market size is estimated at USD 41.71 billion in 2024, and is expected to reach USD 79.19 billion by 2029, growing at a CAGR of 13.68% during the forecast period (2024-2029).

The COVID-19 pandemic had a significant impact on the biopharmaceuticals contract manufacturing market. Contracts related to the COVID-19 pandemic immensely benefited the contract development and manufacturing organization (CDMO) industry. According to an article in Contract Pharma, dated February 2022, the COVID-19 pandemic took two years of tremendous work from the world's biopharmaceutical CMO. The industry's resilience is demonstrated by the astonishing speed with which it overcame the obstacles. The article also stated that revenues at biopharmaceutical CDMOs increased for recombinant proteins, vaccines, monoclonal antibodies, and mainstream biologics by an average of 29%. In fact, some have reported a growth of up to 40%-80% in revenue between 2020 and 2021. In addition, according to an article published in June 2021 in BioProcess International, the increases in CMO capacity spurred by the pandemic are anticipated to benefit the entire industry, especially for the production of cell and gene therapies. The COVID-19 pandemic boosted an already upward-trending biopharmaceutical CMO category. The long-term baseline growth pattern is expected to continue.

Furthermore, several biopharmaceutical CMOs offer services from drug production to drug manufacturing for other organizations in the case of proteins/peptides, antibodies, vaccines, and other biological substances. For instance, in March 2022, Bharat Biotech partnered with the Spanish biopharmaceutical firm, Biofabri, to develop, manufacture, and market a new tuberculosis vaccine. The new TB vaccine, 'MTBVAC,' is being manufactured and developed by Biofabri in close collaboration with the University of Zaragoza, the International AIDS Vaccine Initiative (IAVI), and the Tuberculosis Vaccine Initiative (TBVI). In September 2021, Baxter BioPharma Solutions, a CMO specializing in parenteral (injectable) pharmaceuticals, agreed to provide sterile manufacturing services for NVX-CoV2373, Novavax's COVID-19 recombinant nanoparticle vaccine candidate with Matrix-M

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adjuvant. The agreement is expected to advance commercial-scale manufacturing essential for the vaccine's production and distribution in the UK and European markets. Such activities by the market players are expected to boost the growth of the vaccine contract manufacturing market during the study period.

Moreover, strategic initiatives by the market players, such as contract manufacturing partnerships, are expected to boost the growth of the market studied. For instance, in April 2022, ChimeronBio announced that it had signed a manufacturing agreement with FUJIFILM DiosynthBiotechnologies (FDB) to advance its oncology portfolio to include clinics. ChimeronBio opted for FUJIFILM DiosynthBiotechnologies as its partner for transferring and scaling its drug substance manufacturing process.

However, stringent regulatory requirements and increasing logistics costs are factors hindering the growth of the market studied.

Biopharmaceutical Contract Manufacturing Market Trends

The Vaccine Segment is Expected to Hold Significant Share in the Market over the Forecast Period

The vaccine segment holds a significant market share in the biopharmaceuticals contract manufacturing market. It is anticipated to showcase a similar trend over the forecast period owing to increasing advancements in monoclonal antibody therapy.

The COVID-19 pandemic indicated the potential of vaccine manufacturing and outsourcing as a sustainable revenue stream for companies operating in the market studied. Following the COVID-19 vaccine, the introduction of boosters is expected to create a favourable landscape for the growth of CMO vendors. For instance, in October 2021, Novartis announced an initial agreement to use its manufacturing capacity and capabilities to address the COVID-19 pandemic by expanding its support of the Pfizer-BioNTech COVID-19 vaccine fill and finish. Novartis was set to complete at least 24 million doses in 2022 using its sterile production capabilities at the Novartis Technical Operations plant in Ljubljana, Slovenia. Thus, the increase in CMO agreement for COVID-19 vaccines is expected to boost the growth of the segment.

Besides, initiatives by various governments and health organizations worldwide to provide vaccinations to all people also contribute to the growth of the market studied. For instance, as per the WHO, in February 2022, Djibouti's Ministry of Health, with technical support from the WHO and UNICEF, launched a five-day national polio vaccination campaign to vaccinate approximately 150,000 children in Djibouti. These vaccine drives focusing on the preventive measures for various diseases are expected to drive the growth of the market studied during the study period.

The various strategies adopted by the market players, such as product launches, mergers, and acquisitions, are expected to boost the growth of the segment. For instance, in January 2022, Recipharm AB reported a deal with a big pharmaceutical company to support vaccine manufacturing from its facility in Kaysersberg, France. The company invested almost EUR 14 million into its vaccine manufacturing offering at the site.

Thus, the segment is expected to witness significant growth over the forecast period due to the above-mentioned factors.

North America is Expected to Hold a Significant Share in the Market and Expected to do the Same in the Forecast Period

Within North America, the US is expected to hold a major market share in the biopharmaceutical contract manufacturing market due to the presence of several biopharmaceutical companies with large production capacities, leading to the high consumption of biologics in this region. According to January 2022, update from the CDC, tuberculosis incidence rose 9.4% during 2021 (2.4 cases per 100,000 persons) compared to previous years in the United States. As the burden of chronic diseases is expected to rise, so is the need for biological drugs used in treating such conditions. As a result, the need for contract manufacturing products is expected to rise.

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Moreover, several market players are engaged in the implementation of strategic initiatives such as mergers and partnership agreements. For instance, in March 2021, Baxter International Inc. agreed on Baxter BioPharma Solutions (BPS) to provide fill/finish sterile manufacturing services and supply packaging for approximately 60-90 million doses of the Moderna COVID-19 Vaccine in 2021.

Thus, due to the above-mentioned factors, the market is expected to witness significant growth in the region during the forecast period.

Biopharmaceutical Contract Manufacturing Industry Overview

The biopharmaceuticals contract manufacturing market is consolidated and consists of a few major players. In terms of market share, certain major players are currently dominating the market. Some of the companies currently dominating the market are Boehringer Ingelheim GmbH, Lonza, Inno Biologics Sdn Bhd, Rentschler Biotechnologies GmbH, JRS Pharma (Celonic), Samsung BioLogics, WuXi Biologics, AGC Biologics, ProBioGen AG, and FUJIFILM Diosynth Biotechnologies USA Inc.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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