ADC CDMO Comparison 2026: Conjugation, Payload, Containment

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Executive Summary

Antibody-drug conjugate (ADC) manufacturing requires stitching together monoclonal antibody (mAb) bioproduction, high-potency active pharmaceutical ingredient (HPAPI) linker-payload chemistry, and cytotoxic bioconjugation under specialized containment, a combination few sponsors own in-house. Grand View Research sized the global ADC market at $12.26 billion in 2024 (Source: www.grandviewresearch.com) and the ADC contract manufacturing segment specifically at $8,871.4 million in the same year, projected to reach $16,553.7 million by 2030 (Source: www.grandviewresearch.com), though Mordor Intelligence's competing estimate places the ADC CDMO service market at $1.99 billion in 2026 growing to $6.21 billion by 2031 (Source: www.mordorintelligence.com), a divergence that reflects genuine methodological differences in market scope rather than error. As of August 2026, 14 to 15 ADCs have reached FDA approval depending on cutoff date (Source: link.springer.com) (Source: pmc.ncbi.nlm.nih.gov), and FDA review-designation awarding for the class grew at a 73.3% compound annual rate between 2019 and 2024 (Source: www.pharmaceutical-technology.com).

This report compares the ADC CDMO field across three functional tiers. Large, vertically integrated CDMOs, Lonza, WuXi XDC, and Catalent, offer conjugation at commercial scale alongside mAb and drug-product capacity; Lonza alone announced five distinct Visp, Switzerland bioconjugation or payload-linker expansions between 2023 and 2026 (Source: www.lonza.com), while WuXi XDC funded a roughly 25,000 square-meter Singapore facility (Source: www.biospace.com) in part through a Hong Kong IPO that raised approximately $520 million in November 2023 (Source: www.prnewswire.com). Catalent's ownership changed materially in this period: Novo Holdings A/S, not Novartis, completed a roughly $16.5 billion acquisition of Catalent in December 2024, with three fill-finish sites sold onward to Novo Nordisk A/S (Source: novoholdings.dk). Specialist bioconjugation CDMOs, Piramal Pharma Solutions, Abzena, the AGC Biologics-led Proveo alliance, and Sterling Pharma Solutions, compete on integrated, multi-site programs; Piramal's Grangemouth, Scotland site alone reports more than 1,000 ADC batches delivered at an occupational exposure limit (OEL) below 0.01 micrograms per cubic meter (Source: www.piramalpharmasolutions.com). HPAPI and payload-linker specialists, CordenPharma, Ajinomoto Bio-Pharma Services, Novasep/Axplora, and Simtra BioPharma Solutions, report specialized containment capabilities; CordenPharma cites containment capabilities for OELs down to the picogram-per-cubic-meter level (Source: cordenpharma.com) and Axplora citing OEB6 (Occupational Exposure Band 6) handling at an OEL below 30 nanograms per cubic meter (Source: www.axplora.com). Samsung Biologics has entered later but with more capital, backing a Plant 5 investment exceeding KRW 1.9 trillion, roughly $1.46 to $1.47 billion (Source: samsungbiologics.com) and a dedicated 500-liter ADC facility that began operations in February 2025 (Source: www.koreaherald.com).

None of the CDMOs profiled publish per-batch or per-gram ADC manufacturing pricing, so this report compares capacity, containment classification, regulatory track record, and disclosed capital investment rather than price. Disclosed expansions across the field between 2023 and 2026 indicate a sustained capital-expenditure cycle rather than a mature, stable-capacity market.

There is no single best ADC CDMO; the right partner depends on required conjugation scale, containment tier, and desired breadth of integration, including Lonza's and WuXi XDC's commercial platforms, CordenPharma's and Novasep/Axplora's payload specialization, and Piramal's and Simtra's alliance-based, end-to-end programs. Sponsors managing multi-CDMO ADC supply networks increasingly pair internal chemistry, manufacturing, and controls (CMC) due diligence with independent regulatory and operational advisory support to navigate this fast-moving, capital-intensive, and inspection-sensitive market.

Introduction and Background

An antibody-drug conjugate (ADC) links a monoclonal antibody (mAb) to a cytotoxic small-molecule payload through a chemical linker, giving the resulting molecule the targeting precision of a biologic and the tumor-killing potency of traditional chemotherapy. Manufacturing an ADC requires stitching together three largely separate industrial disciplines: mammalian cell culture to produce the mAb, high-potency active pharmaceutical ingredient (HPAPI) chemistry to synthesize the cytotoxic payload and its linker, and a bioconjugation step that chemically couples the two under highly potent containment before the product moves to sterile fill-finish. Few biopharmaceutical sponsors own all three capabilities in-house, which is why the contract development and manufacturing organization (CDMO) market for ADCs has become one of the most closely watched segments of biomanufacturing as of August 2026.

The stakes are large and growing. Grand View Research estimated the global ADC market at $12.26 billion in 2024 (Source: www.grandviewresearch.com), while the ADC-specific contract manufacturing segment alone was sized at $8,871.4 million in the same year, projected to reach $16,553.7 million by 2030(Source: www.grandviewresearch.com). Grand View Research attributes this outsourcing intensity to the sheer cost and complexity of ADC production, which makes in-house manufacturing impractical for many biopharmaceutical companies, particularly smaller players or those lacking the necessary infrastructure (Source: www.grandviewresearch.com). The regulatory pipeline reflects the same acceleration: GlobalData figures reported by Pharmaceutical Technology show the US Food and Drug Administration (FDA) granted a record 63 review designations to ADCs in 2024, nearly double the previous high of 35 in 2023 (Source: www.pharmaceutical-technology.com), and peer-reviewed reviews place the number of FDA-approved ADC therapeutics at 14 to 15 as of mid to late 2025, depending on cutoff date and whether a later-withdrawn product is counted (Source: link.springer.com) (Source: pmc.ncbi.nlm.nih.gov).

This report compares the CDMOs that dominate ADC bioconjugation, payload-linker synthesis, and HPAPI containment as of August 2026. It groups the field into three functional tiers: large, vertically integrated CDMOs that offer conjugation at commercial scale alongside mAb and drug-product capacity (Lonza, WuXi XDC, and Catalent); specialist bioconjugation CDMOs built specifically around ADC chemistry (Piramal Pharma Solutions, Abzena, the AGC Biologics-led Proveo alliance, and Sterling Pharma Solutions); and HPAPI or payload-linker specialists whose core competency is handling the cytotoxic warheads that make ADCs work

(CordenPharma, Ajinomoto Bio-Pharma Services, Novasep/Axplora, and Simtra BioPharma Solutions). A separate section examines Samsung Biologics, whose rapid, capital-intensive entry into ADC manufacturing illustrates how the competitive landscape is shifting. Because per-batch or per-gram ADC contract manufacturing pricing is not publicly disclosed by any CDMO profiled here, comparisons in this report rely on disclosed capacity, containment classification, regulatory track record, and capital investment rather than price, consistent with standard practice across the biologics CDMO industry.

Full-Scale, Integrated ADC CDMOs

Lonza

Lonza describes itself as manufacturing the majority of commercially available ADCs (Source: www.lonza.com), a claim built on a bioconjugation franchise that, as of November 2024, had produced over 1,000 cGMP batches for more than 70 programs since entering the market in 2006 (Source: www.lonza.com). Lonza's bioconjugates business unit states it runs more than 300 GMP batches per year (Source: www.lonza.com), operating GMP production suites that span gram-scale ADC payload production through multi-kilogram-scale drug substance manufacturing at its Visp, Switzerland campus (Source: www.lonza.com). Visp itself is positioned as a hub for highly potent APIs, peptides, and bioconjugates including ADCs (Source: www.lonza.com).

Lonza has expanded bioconjugation capacity at Visp in nearly every year since 2023. A February 2023 announcement confirmed completion of an earlier two-suite expansion supporting both clinical and commercial ADC supply (Source: www.lonza.com). In October 2023, Lonza announced it would quadruple dedicated bioconjugation capacity for a major biopharma partner by adding two new large-scale suites at its Ibex Dedicate Biopark, expected operational in 2026 with roughly 180 new jobs (Source: www.lonza.com). A year later, in October 2024, Lonza extended a separate collaboration to build an approximately 800 square-meter customer-dedicated bioconjugation suite, targeted for 2027 (Source: www.lonza.com). The following month, Lonza announced two additional 1,200-liter multipurpose bioconjugation suites occupying roughly 2,000 square meters, doubling Lonza's multipurpose bioconjugation capacity and creating about 200 jobs, targeted for 2028 (Source: www.lonza.com) (Source: www.lonza.com). Most recently, in June 2026, Lonza announced an expansion of payload-linker (HPAPI) manufacturing capacity at Visp integrated with its mAb, conjugation, and drug product capabilities across Visp and Stein, Switzerland, targeted for 2028 (Source: www.lonza.com). Taken together, these five expansion announcements in roughly three and a half years indicate that Lonza has treated ADC bioconjugation and payload capacity as one of its highest-priority capital allocation areas.

WuXi XDC

WuXi XDC, spun off from WuXi Biologics and listed independently in Hong Kong in November 2023, runs GMP conjugation facilities in Wuxi's Xinwu District featuring up to two 2,000-liter bioreactors for mAb intermediate production and two independent ADC drug substance production lines ranging from 50 liters to 2,000 liters (Source: wuxixdc.com). The Wuxi conjugation facility reports annual drug-substance conjugation batch capacity of over 100 batches (Source: wuxixdc.com), using an OEB5 (Occupational Exposure Band 5) isolator for payload-linker dispensing and dissolution (Source: wuxixdc.com), and cGMP scale that reaches up to approximately 85,000 vials per batch per day for ADC drug product in 2R vial format (Source: wuxixdc.com). In September 2023, WuXi XDC launched new commercial manufacturing facilities, known internally as XBCM2 and XDP2, covering nearly 7,000 square meters and doubling capacity for bioconjugate drug substance, antibody intermediates, and drug product (Source: www.prnewswire.com).

WuXi XDC is now extending that footprint internationally. Construction on a Singapore site at Tuas Biomedical Park broke ground in March 2024 on approximately 22,000 square meters (Source: wuxixdc.com) and reached mechanical completion on June 30, 2025, at an expanded footprint of roughly 25,000 square meters, targeting GMP manufacturing start in 2026 with support for up to 2,000 liters per batch of mAb and drug substance and 8 million vials of drug product per year (Source: www.biospace.com), a facility anticipated to create more than 500 job opportunities (Source: www.biospace.com). That build-out was funded in part by WuXi XDC's own November 2023 initial public offering (IPO), which the company's 2023 results release describes as raising US$520 million and being named "Best IPO" by the IFR Asian Awards 2023 (Source: www.prnewswire.com). The company's own listing announcement put expected gross proceeds at approximately HK$4,071 million assuming full exercise of the over-allotment option (Source: www.prnewswire.com), while law firm Davis Polk's deal record cites gross proceeds of approximately HK$3.68 billion prior to exercise of that option (Source: www.davispolk.com), a modest discrepancy that reflects the two figures being measured before versus after the over-allotment exercise.

Catalent

Catalent's ADC offering centers on its SMARTag platform, a site-specific, aldehyde-tag-based bioconjugation technology that the company says has been used to produce more than 600 antibodies and antibody fusions via its GPEx cell line technology (Source: www.catalent.com). On the small-molecule and HPAPI side, Catalent states its high-potency network uses purpose-built isolator systems validated at OEB4 and OEB5-plus containment levels (Source: www.catalent.com), with validated experience handling more than 300 potent compounds including hormones and cytotoxics (Source: www.catalent.com) across more than 300 Category 3 and 4 compounds spread over 12 sites globally (Source: www.catalent.com). On the biologics drug-substance side, Catalent completed a 2021 expansion of its Madison, Wisconsin site that added two new manufacturing suites, each equipped with a 2x2,000-liter single-use bioreactor system capable of processing batches of 2,000 or 4,000 liters (Source: biologics.catalent.com).

Catalent's corporate ownership changed substantially in the period covered by this report. Novo Holdings A/S, a Danish life-science investor unrelated to Novartis, completed its all-cash acquisition of Catalent on December 18, 2024, in a transaction with a total enterprise value of approximately $16.5 billion (Source: novoholdings.dk). As part of the same transaction, three of Catalent's fill-finish sites, located in Anagni, Italy; Bloomington, Indiana; and Brussels, Belgium, were sold onward to Novo Nordisk A/S (Source: novoholdings.dk), for which Novo Nordisk's own SEC Form 6-K filing states an upfront payment of $11 billion (Source: www.sec.gov). Buyers evaluating Catalent as an ADC manufacturing partner should note that this ownership change reallocated some of its biologics fill-finish capacity to Novo Nordisk's own supply chain rather than to third-party CDMO customers.

Specialist Bioconjugation CDMOs

Piramal Pharma Solutions

Piramal's Grangemouth, Scotland facility has offered development, clinical, and commercial-scale manufacturing of bioconjugates including ADCs since 2004 (Source: www.piramalpharmasolutions.com), and the site has successfully cleared inspections from the US FDA, UK Medicines and Healthcare products Regulatory Agency (MHRA), Japan's Pharmaceuticals and Medical Devices Agency (PMDA), and Brazil's ANVISA (Source: www.piramalpharmasolutions.com). Piramal states the site can handle compounds with an occupational exposure limit (OEL) below 0.01 micrograms per cubic meter and has delivered 700 GMP batches to date across 18-plus years of experience (Source: www.piramalpharmasolutions.com), with a cumulative track record of more than 1,000 ADC batches, six projects exceeding 1-kilogram batch size, and GMP manufacturing of 35 distinct bioconjugates (Source: www.piramalpharmasolutions.com).

Piramal has invested repeatedly in Grangemouth capacity. A February 2022 announcement described a combined $55 million (roughly, £45 million of which was specific to Grangemouth) investment plan (Source: www.prnewswire.com) that culminated in a December 2023 opening described by Piramal as the culmination of a £45 million investment, supported by a £2.4 million Scottish Enterprise grant, adding two new ADC manufacturing suites to complement the existing three (Source: www.prnewswire.com) (Source: www.prnewswire.com). Grangemouth now anchors Piramal's ADCelerate program, an integrated offering spanning mAb development, linker-payload synthesis, conjugation, and sterile fill-finish across four global Piramal sites (Source: www.prnewswire.com). In September 2024, Piramal extended that program with an $80 million expansion of its Lexington, Kentucky sterile injectables site (Source: www.piramalpharma.com), where current peak-utilization capacity of 104 product batches per year is expected to rise above 240 annual batches once the expansion completes in the first quarter of 2027 (Source: www.piramalpharma.com).

Abzena

Abzena runs dedicated high-potency and bioconjugate manufacturing from a facility in Bristol, Pennsylvania (Source: abzena.com), stating it can support compounds with occupational exposure limits of 1 to 10 nanograms per cubic meter across its research laboratories, high-potency process laboratories, and small-molecule cGMP suites using dedicated containment infrastructure (Source: abzena.com). Scale ranges from up to 5 grams of OEL 1-10 ng/m3 compounds in research labs to more than 1 kilogram in the company's high-potency process labs and small-molecule cGMP suites (Source: abzena.com), with engineering controls that include isolator glove boxes in all cytotoxic containment laboratories (Source: abzena.com). Across six integrated facilities in the US and UK, Abzena reports more than 65,000 square feet of combined cGMP manufacturing and laboratory space (Source: abzena.com), with its San Diego, California operations supporting biological drug programs from 50 liters to 2,000 liters of scale (Source: abzena.com).

Abzena's market position was validated externally in March 2026, when it was named a Leader in the Frost & Sullivan Frost Radar report for Antibody-Drug Conjugate Contract Development and Manufacturing Organizations, recognized for both innovation and growth (Source: www.prnewswire.com). Its client work is illustrated by an August 2024 announcement that Abzena had supplied clinical trial material for Angiex's Phase 1 study of AGX101, a TM4SF1-directed ADC, through an integrated program covering linker-payload design and synthesis, bioconjugation, process development, and cGMP manufacturing (Source: www.prnewswire.com), a rare example of a CDMO publicly naming both the client and the molecule.

AGC Biologics and the Proveo Alliance

AGC Biologics does not run bioconjugation in-house at scale; instead it participates in the Proveo alliance, which combines AGC's monoclonal antibody production expertise with Cerbios-Pharma's bioconjugation and linker-payload capabilities and Medac's aseptic fill and lyophilization services to offer a full end-to-end ADC solution (Source: www.agcbio.com). Cerbios, the alliance's bioconjugation partner, opened a new expansion area at its Lugano, Switzerland site in February 2025 for clinical and commercial HPAPI and ADC linker-payload manufacturing, with isolator containment technology rated to an OEL below 10 nanograms per cubic meter (Source: cerbios.swiss). That line, Swissmedic-approved in 2023, hosts dedicated and single-use reactors up to 100 liters, handling batches from grams to kilogram scale across clinical and commercial stages (Source: cerbios.swiss). On the antibody side, AGC Biologics offers single-use mammalian manufacturing scales from 500 liters up to 12,000 liters (Source: www.agcbio.com), with its Seattle campus specifically supporting mammalian manufacturing from 100 liters to 12,000 liters across both stainless-steel and single-use systems (Source: www.agcbio.com). The Proveo model is instructive for sponsors: it shows that end-to-end ADC coverage does not always require a single company to own every process step, provided the alliance partners coordinate quality systems and regulatory filings closely.

Sterling Pharma Solutions

Sterling Pharma Solutions entered ADC manufacturing by acquiring ADC Biotechnology (ADC Bio), a UK-based bioconjugation development business, in April 2021 (Source: www.sterlingpharmasolutions.com). The acquired 6,500 square-meter Deeside, Wales facility, which Sterling's team moved into in 2018 as a purpose-built containment site for highly potent bioconjugates (Source: www.sterlingpharmasolutions.com), received an MHRA MIA(IMP) license for cGMP ADC manufacturing in April 2023 (Source: www.sterlingpharmasolutions.com). Deeside supports conjugation up to 75 liters of reactive volume (Source: www.sterlingpharmasolutions.com) using independently qualified glove box isolators rated below 2 nanograms per cubic meter (Source: www.sterlingpharmasolutions.com), and it works in parallel with Sterling's Wisconsin, US site, which develops and manufactures the highly potent small molecules that make up the linker-payload portion of an ADC (Source: www.sterlingpharmasolutions.com). In October 2024, Sterling announced a second-phase Deeside expansion exceeding £10 million to add a 2,300 square-foot suite with reactors up to 500 liters, more than doubling the site's existing bioconjugation capacity (Source: www.sterlingpharmasolutions.com). The new Grade C cleanroom associated with that expansion is designed to handle highly potent molecules with exposure limits down to 0.01 micrograms per cubic meter, corresponding to Occupational Exposure Band 5 (Source: www.sterlingpharmasolutions.com).

HPAPI and Payload-Linker Specialists

CordenPharma

CordenPharma positions itself as a global top-5 service provider in the production of highly potent APIs and drug products (Source: cordenpharma.com), with containment capabilities reaching OELs down to the picogram-per-cubic-meter level (Source: cordenpharma.com). As of an October 2025 capacity update, CordenPharma's Colorado facility, built on the former Pfizer/Hospira site the company acquired in 2017, offers secure, scalable containment for APIs with occupational exposure limits as low as 0.05 micrograms per cubic meter (Source: cordenpharma.com). The same October 2025 update described new 6,000-liter reactors with enhanced isolation and drying capability at CordenPharma's Chenove, France site (Source: cordenpharma.com) and a new medium-scale oral solid dose line at its Plankstadt, Germany facility capable of handling compounds with OEL levels as low as 0.05 micrograms per cubic meter (Source: cordenpharma.com).

Ajinomoto Bio-Pharma Services

Ajinomoto Bio-Pharma Services (AjiBio-Pharma) brings a proprietary conjugation chemistry to the ADC CDMO field: AJICAP, a direct chemical, site-specific conjugation method for intact native antibodies (Source: ajibio-pharma.ajinomoto.com). The company's dedicated ADC and HPAPI manufacturing facility in San Diego, California spans roughly 57,000 square feet (Source: ajibio-pharma.com). In an April 19, 2023 announcement, AjiBio-Pharma said the line would manufacture a commercial product and reported a batch capacity of over 200,000 syringes (Source: www.ajibio-pharma.com). AjiBio-Pharma's parent, Ajinomoto Co., is also licensing its technology outward: on October 31, 2025, Ajinomoto signed a licensing agreement with Astellas Pharma for the use of AJICAP in Astellas' own CDMO business (Source: www.ajibio-pharma.com), a sign that ADC conjugation chemistry itself is becoming a licensable, tradable asset independent of manufacturing capacity.

Novasep/Axplora

Novasep, now operating under the unified Axplora brand after Novasep, PharmaZell, and Farmabios consolidated under a single name on October 20, 2022 (Source: www.axplora.com), markets specialized ADC handling up to OEB6, which it defines as an OEL below 30 nanograms per cubic meter, backed by what the company describes as a 100% regulatory inspection track record (Source: www.axplora.com). Axplora states that, at the time of its disclosure, its supply chain had supported six of 15 FDA-approved ADC products and had delivered more than 300 cGMP payload batches (Source: www.axplora.com). Its Le Mans, France site, equipped to handle compounds with an OEL below 30 nanograms per cubic meter over an 8-hour shift and a maximum batch size of 10 kilograms (Source: www.pharmaceutical-tech.com), is capable of handling both OEB Band 3 and Band 4 compounds under the SafeBridge classification system, including cytotoxics (Source: www.pharmaceutical-tech.com). Novasep has invested in HPAPI capacity repeatedly: a May 2021 announcement described a more than 4 million euro ($4.83 million) investment and at least 30 new hires at Le Mans (Source: www.fiercepharma.com), while a July 2022 investment at its Mourenx, France site created a multipurpose pilot workshop equipped to produce batches ranging from 30 to 100 kilograms of highly potent, cancer-treatment-oriented APIs (Source: www.outsourcedpharma.com).

Simtra BioPharma Solutions

Simtra BioPharma Solutions is the successor to what was previously known as Baxter BioPharma Solutions. Baxter International signed a definitive agreement in May 2023 to divest the business to Advent International and Warburg Pincus, with Baxter stating it would receive $4.25 billion in cash subject to closing adjustments (Source: www.baxter.com); the deal closed on October 2, 2023, with the business renamed Simtra BioPharma Solutions and operating as a standalone CDMO (Source: warburgpincus.com). Simtra describes deep scientific expertise across cytotoxics, highly potent compounds, biologics, vaccines, small molecules, and diluents (Source: www.baxterbiopharmasolutions.com). In June 2025, Simtra formed a five-year strategic alliance with the Life Science business of Merck KGaA, Darmstadt, Germany, which operates as MilliporeSigma in the US and Canada (Source: www.prnewswire.com), a partnership explicitly designed to create a turnkey offering spanning ADC bioconjugation, linker-payload manufacturing, drug product formulation, and fill-finish (Source: www.prnewswire.com), effectively assembling an end-to-end ADC network out of two companies that historically specialized in adjacent but distinct process steps.

Samsung Biologics and the Vertical-Integration Challenge

Samsung Biologics has entered ADC manufacturing later than the specialists above but with considerably more capital behind the move. At the JPMorgan Healthcare Conference in January 2023, chief executive John Rim said ADC manufacturing would take place in a facility within Plant 4 in Incheon, South Korea, with operations planned for early 2024 (Source: www.fiercepharma.com). In March 2023, Samsung Biologics announced it would invest over KRW 1.9 trillion in Plant 5, part of its Bio Campus II expansion (Source: samsungbiologics.com), a figure BioProcess International later reported as equivalent to $1.47 billion, adding 180,000 liters of bioreactor capacity and bringing Samsung Biologics' total CDMO capacity to 784,000 liters (Source: www.bioprocessintl.com). A newly constructed, 500-liter, ADC-dedicated production facility began operations in February 2025, according to a JPMorgan Healthcare Conference announcement reported by the Korea Herald (Source: www.koreaherald.com).

Samsung Biologics' broader CDMO momentum is relevant context for its ADC ambitions: BioProcess International reported that the company landed a $1.4 billion manufacturing contract with an undisclosed European pharmaceutical company in January 2025, accounting for 40% of its 2024 orders (Source: www.bioprocessintl.com). Samsung Biologics' strategy illustrates a distinct competitive path from the specialist CDMOs profiled above: rather than growing organically around a proprietary conjugation chemistry, it is applying the balance sheet and manufacturing discipline built in its core monoclonal antibody CDMO business to a bolt-on ADC capability, competing on scale and regulatory track record more than on chemistry differentiation.

Feature Comparison

Table 1 below summarizes disclosed conjugation and drug-substance scale, HPAPI containment classification, end-to-end scope, and the most significant capacity investment announced for each CDMO between 2023 and 2026.

CDMO	PRIMARY ADC SITE(S)	CONJUGATION / DRUG SUBSTANCE SCALE	HPAPI CONTAINMENT (OEB/OEL)	END-TO-END SCOPE	NOTABLE 2023-2026 INVESTMENT
Lonza	Visp, Switzerland	Gram-scale payload to multi-kilogram drug substance (Source: www.lonza.com)	OEL 100ng to 1ng range disclosed for ADC suites (Source: www.lonza.com)	mAb, payload-linker, conjugation, drug product (Source: www.lonza.com)	Two 1,200L suites plus payload-linker expansion, targeted 2028 (Source: www.lonza.com)
WuXi XDC	Wuxi, China; Singapore	ADC drug substance lines 50L to 2,000L	OEB5 isolator for payload-linker handling	mAb intermediate, DS conjugation, DP (up to ~85,000 vials/day)	~25,000 sqm Singapore site, mechanically complete June 2025 (Source: www.biospace.com)
Catalent (Novo Holdings)	Madison, WI (mAb); Bloomington/Brussels/Anagni now Novo Nordisk-owned	2x2,000L single-use bioreactor suites, Madison (Source: biologics.catalent.com)	OEB4 and OEB5-plus isolator containment (Source: www.catalent.com)	SMARTag bioconjugation, HPAPI, biologics DS (Source: www.catalent.com)	Acquired by Novo Holdings for ~$16.5B enterprise value, Dec 2024 (Source: novoholdings.dk)
Piramal Pharma Solutions	Grangemouth, Scotland; Lexington, KY	Multi-kg batches, 6 projects >1kg, 35 bioconjugates	OEL <0.01 µg/m3	ADCelerate: mAb to fill-finish across 4 sites (Source: www.prnewswire.com)	£45M Grangemouth (2023) plus $80M Lexington (2024, complete 2027) (Source: www.piramalpharma.com)
Abzena	Bristol, PA; San Diego, CA	5g (research) to >1kg (cGMP); 50L to 2,000L biologics (Source: abzena.com)	OEL 1 to 10 ng/m3 (Source: abzena.com)	HPAPI, bioconjugation, DS and DP across 6 sites (Source: abzena.com)	Frost Radar Leader (Innovation and Growth), March 2026 (Source: www.prnewswire.com)
AGC Biologics (Proveo)	Lugano (Cerbios); Seattle, WA (AGC)	Reactors up to 100L (Cerbios); mAb 100L to 12,000L (AGC) (Source: www.agcbio.com)	OEL <10 ng/m3 (Cerbios line) (Source: cerbios.swiss)	Alliance model: mAb (AGC), bioconjugation (Cerbios), fill (Medac) (Source: www.agcbio.com)	Cerbios Lugano expansion opened Feb 2025 (Source: cerbios.swiss)
Sterling Pharma Solutions	Deeside, Wales; Wisconsin, US	Conjugation up to 75L reactive volume (Source: www.sterlingpharmasolutions.com)	<2 ng/m3 glove-box isolators; OEB5 cleanroom (Source: www.sterlingpharmasolutions.com)	Bioconjugation (Deeside) plus linker-payload (Wisconsin) (Source: www.sterlingpharmasolutions.com)	>£10M Deeside expansion, reactors to 500L, Oct 2024 (Source: www.sterlingpharmasolutions.com)
CordenPharma	Colorado, US; Chenove, France; Plankstadt, Germany	6,000L reactors (Chenove); 12,000L line (Bergamo) (Source: cordenpharma.com)	Company-reported OEL capability down to picogram/m3 (Source: cordenpharma.com)	HPAPI and payload-linker synthesis (not bioconjugation)	Multi-site 2025 capacity expansion across 6 platforms (Source: cordenpharma.com)
Ajinomoto Bio-Pharma Services	San Diego, CA	57,000 sqft dedicated ADC/HPAPI site (Source: ajibio-pharma.com)	Not publicly disclosed as an OEB/OEL classification	Proprietary AJICAP conjugation, HPAPI, fill-finish (Source: ajibio-pharma.ajinomoto.com)	High-potency vial line with a company-reported batch capacity of >200,000 syringes (Source: www.ajibio-pharma.com); AJICAP licensed to Astellas Pharma, Oct 2025 (Source: www.ajibio-pharma.com)
Novasep/Axplora	Le Mans, Mourenx, France	10kg max batch (Le Mans); 30-100kg (Mourenx) (Source: www.outsourcedpharma.com)	OEB6, OEL <30 ng/m3 (Source: www.axplora.com)	ADC payload-linker synthesis (not bioconjugation)	Historical company-reported supplier to six of 15 FDA-approved ADCs at the time of disclosure (Source: www.axplora.com)
Simtra BioPharma Solutions	Multiple US/EU sites	Not publicly disclosed for HPAPI drug substance	Cytotoxics and highly potent compound expertise (Source: www.baxterbiopharmasolutions.com)	Turnkey alliance with MilliporeSigma: conjugation to fill-finish (Source: www.prnewswire.com)	5-year MilliporeSigma alliance, June 2025 (Source: www.prnewswire.com)
Samsung Biologics	Incheon, South Korea (Plant 4, Plant 5)	500L ADC-dedicated facility; total CDMO capacity 784,000L (Source: www.bioprocessintl.com)	Not publicly disclosed as OEB/OEL band	mAb, ADC conjugation, DP within Plant 4/5 (Source: www.fiercepharma.com)	Plant 5: over KRW 1.9 trillion (~$1.46-1.47B) (Source: samsungbiologics.com)

The matrix illustrates a structural pattern rather than a single winner. Lonza and WuXi XDC compete on integrated scale, with disclosed batch sizes reaching 2,000 liters and repeated multi-year capacity additions. Reported containment specifications are not equivalent across providers: CordenPharma cites capabilities down to the picogram-per-cubic-meter level and Sterling cites glove-box isolators below 2 ng/m3, whereas Axplora cites OEB6 handling at an OEL below 30 ng/m3 (Source: cordenpharma.com) (Source: www.sterlingpharmasolutions.com) (Source: www.axplora.com). Piramal and Abzena occupy a middle position, combining strong containment figures with integrated, multi-site programs (ADCelerate and Abzena's six-site network, respectively) that span from linker-payload synthesis through fill-finish. AGC Biologics and Simtra illustrate a third model, in which end-to-end coverage is achieved through formal alliances rather than single-company vertical integration, a structure that can shorten time to capability but adds a coordination and quality-alignment burden across corporate boundaries.

Performance and Benchmarks

Direct, apples-to-apples throughput or yield benchmarks across ADC CDMOs are not publicly disclosed; none of the companies profiled in this report publish comparative batch-success rates, conjugation efficiency, or cost-per-gram figures. In their absence, the most useful proxy measures are regulatory inspection history, cumulative batch counts, and the pace of disclosed capacity investment, all of which this report has traced to primary sources.

On inspection history, Piramal's Grangemouth site reports having cleared inspections from the FDA, MHRA, PMDA, and ANVISA, while CordenPharma states its two integrated Colorado facilities are routinely inspected by the FDA, EMA, and PMDA. Axplora separately claims a 100% regulatory inspection track record for its ADC business specifically (Source: www.axplora.com). On cumulative batch experience, the figures disclosed range widely by company and by definition (total ADC batches versus annual conjugation batch capacity versus total cGMP batches across all modalities): Lonza cites over 1,000 cGMP bioconjugate batches since 2006 (Source: www.lonza.com), Piramal cites more than 1,000 ADC batches and 700 GMP batches specifically attributed to its OEL <0.01 µg/m3 line, and Axplora cites more than 300 cGMP payload batches and historically reported supporting six of 15 FDA-approved ADC products at the time of its disclosure (Source: www.axplora.com). These figures are not directly comparable because each CDMO defines "batch" differently across development-stage, clinical, and commercial manufacturing, and none discloses a denominator (total batches attempted) against which a success rate could be computed; sponsors evaluating these claims should request underlying batch records during due diligence rather than relying on headline batch counts alone.

Capacity investment pace is the most consistently disclosed and comparable metric across the field. Between 2023 and 2026, this report identified multiple disclosed capacity announcements, including Lonza's five Visp expansions, Piramal's £45 million Grangemouth expansion and $80 million Lexington expansion, Sterling's more than £10 million Deeside expansion, Novasep/Axplora's Le Mans investment and Mourenx workshop, and Samsung Biologics' over-KRW-1.9-trillion (approximately $1.46 to $1.47 billion) Plant 5. This pattern of near-continuous, multi-site capacity building across nearly every profiled CDMO indicates that the industry, as of August 2026, has been in a sustained capital expenditure cycle rather than a mature, stable-capacity phase, a dynamic with direct implications for sponsors negotiating multi-year supply agreements (discussed further in the Case Studies section below).

Data Analysis and Evidence

Table 2 below compares six market-research entries from four firms covering the ADC and ADC-CDMO market, illustrating how widely commercial forecasts diverge depending on methodology and market scope definition.

RESEARCH FIRM	MARKET SCOPE	BASE YEAR VALUE	FORECAST YEAR VALUE	CAGR
Grand View Research	Global ADC market	$12.26B (2024) (Source: www.grandviewresearch.com)	Not disclosed in fetched excerpt	Not disclosed in fetched excerpt
Grand View Research	ADC contract manufacturing market	$8,871.4M (2024)	$16,553.7M (2030) (Source: www.grandviewresearch.com)	~11%
Technavio	Global ADC market growth	2025 baseline	+$13.77B by 2030 (Source: www.technavio.com)	15.7%
Mordor Intelligence	Global ADC market	$20.12B (2026)	$71.55B (2031) (Source: www.mordorintelligence.com)	28.88%
Mordor Intelligence	ADC Drug CDMO Service market	$1.99B (2026)	$6.21B (2031) (Source: www.mordorintelligence.com)	25.52%
Roots Analysis	ADC contract manufacturing market	$1,720M (2025)	$3,212M (2035) (Source: www.rootsanalysis.com)	4.6%

The spread in these figures, from Roots Analysis's $3.2 billion 2035 estimate for ADC contract manufacturing to Mordor Intelligence's implied multi-billion-dollar 2031 figure for a similarly named "ADC Drug CDMO Service" market, reflects genuine methodological divergence rather than a simple typo or error: different firms scope "ADC contract manufacturing" differently, with some including only bioconjugation and drug-substance services and others bundling in payload-linker synthesis, analytical services, and fill-finish. Readers should treat any single market-size figure for this segment as directional rather than precise, and should always check which process steps a given estimate includes before comparing it to another firm's number.

On the clinical and regulatory side of demand, Roots Analysis states the ADC pipeline includes over 614 drug candidates undergoing clinical trial evaluation alongside 28 ADC therapeutic programs already approved globally (Source: www.rootsanalysis.com), while Mordor Intelligence separately projects that by 2025 the clinical pipeline would feature more than 200 ADC candidates targeting over 50 antigens, with 41 assets already in Phase III trials (Source: www.mordorintelligence.com). These pipeline figures differ by an order of magnitude (614 versus 200-plus), again likely reflecting different definitions of "candidate" (all disclosed molecules in any development stage versus only clinical-stage assets with active trials). On approvals specifically, a peer-reviewed review in Current Oncology Reports counted 14 FDA-approved ADC products as of July 2025 (Source: link.springer.com), a separate peer-reviewed review in the Journal of Hematology & Oncology counted 15 (Source: pmc.ncbi.nlm.nih.gov), and a December 2025 review in Pharmaceutics confirmed 15 approvals by 2025 while noting one product was later withdrawn for safety reasons (Source: pmc.ncbi.nlm.nih.gov); Counting the 15 products reported in peer-reviewed literature through 2025 plus Decnupaz, which FDA approved on May 27, 2026, yields 16 distinct FDA-approved ADC products as of August 2026 (Source: pmc.ncbi.nlm.nih.gov) (Source: www.fda.gov). Regulatory momentum behind the category is corroborated independently by GlobalData figures showing ADC review-designation awarding grew at a 73.3% compound annual growth rate over 2019 to 2024, compared with a 22% CAGR in the preceding decade (2009 to 2018) (Source: www.pharmaceutical-technology.com). Finally, deal activity in the ADC space provides a market-validated proxy for demand: AbbVie's acquisition of ImmunoGen, maker of the ADC Elahere, was valued at $31.26 per share in cash for a total equity value of approximately $10.1 billion, announced November 30, 2023 (Source: investors.abbvie.com), one of the largest single acquisitions of an ADC-focused biopharmaceutical company on record and a signal that large pharmaceutical buyers view ADC platforms, and by extension the manufacturing capacity behind them, as strategically valuable.

Case Studies and Real-World Examples

WuXi XDC's Hong Kong Listing and Singapore Build-Out

WuXi XDC's November 2023 Hong Kong IPO, detailed in the Full-Scale CDMO section above, issued a total of 178,446,000 shares at an offer price of HK$20.60, the high end of its indicated range (Source: www.prnewswire.com), and BioProcess International reported the stock rose 39% on its first day of trading (Source: www.bioprocessintl.com). The capital raised has been directly linked to physical capacity: WuXi XDC broke ground on its Singapore facility in March 2024 and reached mechanical completion in June 2025, positioning the company to begin GMP manufacturing there in 2026 and directly targeting the growing pool of Western biopharma sponsors seeking ADC manufacturing capacity outside mainland China amid geopolitical uncertainty. This case illustrates a broader financing pattern among Asia-based ADC CDMOs: public capital markets, rather than reinvested operating cash flow alone, are funding a meaningful share of new global bioconjugation capacity.

Samsung Biologics' Capital-Intensive Entry

Samsung Biologics' path into ADC manufacturing, traced in the section above, is a useful counterpoint to WuXi XDC's build. Rather than raising dedicated capital for ADCs specifically, Samsung Biologics folded its ADC investment into its existing, much larger Bio Campus II expansion program, of which Plant 5's over-KRW-1.9-trillion investment was one component (Source: samsungbiologics.com). The company brought its dedicated 500-liter ADC facility online in February 2025, roughly two years after first signaling the plan at the January 2023 JPMorgan Healthcare Conference (Source: www.fiercepharma.com), a timeline that illustrates how even a well-capitalized, top-tier CDMO needs roughly two years to move from public commitment to operational ADC capacity, a benchmark sponsors can use when planning their own manufacturing timelines.

AbbVie's $10.1 Billion Acquisition of ImmunoGen

AbbVie's acquisition of ImmunoGen, the developer of the FDA-approved ADC Elahere (mirvetuximab soravtansine), for approximately $10.1 billion in cash (Source: investors.abbvie.com) is a reminder that CDMO relationships are frequently inherited through M&A rather than negotiated fresh. When a large pharmaceutical company acquires a smaller ADC innovator, it typically also acquires that company's existing CDMO contracts, technology transfer obligations, and manufacturing risk profile, meaning ADC CDMO selection decisions made by small and mid-size biotechs early in development can materially affect a much larger acquirer's post-deal integration timeline and cost.

Implications and Future Directions

Three structural trends are likely to shape the ADC CDMO landscape beyond 2026. First, the industry-wide capacity build-out documented in the Performance and Benchmarks section includes multiple disclosed expansions across Lonza, Piramal, Sterling, and Samsung Biologics since 2023. Second, geographic diversification is accelerating, driven by both capacity economics and geopolitical risk management: WuXi XDC's Singapore build-out illustrates investment outside a single dominant geography, a pattern likely to continue as sponsors seek to diversify regional supply chains. Third, end-to-end integration is increasingly being achieved through formal alliances (AGC Biologics with Cerbios and Medac; Simtra with MilliporeSigma) rather than single-company vertical acquisition, a lower-capital-intensity path to full-service ADC offerings that smaller and mid-tier CDMOs are likely to replicate.

For sponsors, these dynamics raise the practical question of how to evaluate and select an ADC CDMO partner in an environment of rapid capacity change, divergent containment specifications, and complex regulatory, technology-transfer, and supply-chain requirements. Because CDMO selection intersects deeply with regulatory compliance strategy, technology transfer planning, and long-term supply chain risk management, sponsors increasingly draw on specialized life-sciences advisory support alongside their internal CMC (chemistry, manufacturing, and controls) and quality teams. IntuitionLabs, a life-sciences and AI consultancy and an X-Pages Partner for Veeva Vault CRM, is not itself an ADC manufacturer or CDMO; its advisory and consulting practice states that it helps pharmaceutical and life sciences companies navigate complex challenges, optimize operations, and drive digital transformation, including regulatory compliance advisory work (Source: intuitionlabs.ai), and the firm describes its broader mission as understanding the unique regulatory landscape, data complexities, and business drivers of the life sciences sector (Source: intuitionlabs.ai). For sponsors managing a portfolio of ADC programs across multiple CDMO relationships, that kind of independent, technology-and-compliance-focused advisory support can complement (rather than replace) direct CMC due diligence on the manufacturing capabilities profiled in this report.

Frequently Asked Questions (FAQs)

What is an ADC CDMO? An ADC CDMO is a contract development and manufacturing organization that provides some or all of the process steps required to manufacture an antibody-drug conjugate for a biopharmaceutical sponsor, spanning monoclonal antibody production, linker-payload (HPAPI) synthesis, bioconjugation, and sterile fill-finish. Because ADC manufacturing spans multiple specialized disciplines, many sponsors work with more than one CDMO across the value chain, as illustrated by the AGC Biologics/Cerbios/Medac Proveo alliance and the Simtra/MilliporeSigma partnership profiled above (Source: www.agcbio.com).

Which CDMOs report high ADC conjugation throughput? Among the CDMOs profiled, Lonza reports over 1,000 cGMP bioconjugate batches since 2006 and more than 300 GMP batches per year; WuXi XDC reports over 100 drug-substance conjugation batches annually and ADC drug-substance lines up to 2,000 liters (Source: www.lonza.com) (Source: wuxixdc.com).

What is the difference between an OEB and an OEL in HPAPI containment? An Occupational Exposure Limit (OEL) is a specific airborne concentration threshold, typically expressed in micrograms or nanograms per cubic meter, below which workplace exposure to a compound is considered acceptable. An Occupational Exposure Band (OEB) is a categorical classification, generally numbered or lettered, that groups compounds by potency and corresponding containment requirement rather than specifying an exact numeric limit. The US National Institute for Occupational Safety and Health (NIOSH) describes its own banding system as classifying chemicals into five bands, A through E, each with its own exposure limit range (Source: www.cdc.gov), while the pharmaceutical CDMO industry more commonly uses a numbered OEB1 through OEB6 scale (as referenced by WuXi XDC, Catalent, and Novasep/Axplora above) tied to SafeBridge-style potency categorization; ISPE's Good Practice Guide on Containment for Potent Compounds, published in December 2022, covers the underlying methodology, safe working levels, and exposure control mechanisms in detail (Source: ispe.org). A peer-reviewed review of HPAPI manufacture for ADC generation notes that the potent nature of cytotoxic ADC payloads requires substantial investment in containment technology to protect both operators and the environment (Source: pubmed.ncbi.nlm.nih.gov).

How much does ADC contract manufacturing cost? None of the CDMOs profiled in this report publish per-batch, per-gram, or per-program pricing for ADC manufacturing services, consistent with standard practice across the biologics and specialty CDMO industry more broadly. Grand View Research's market analysis notes that the high cost of ADC manufacturing itself, not the cost of outsourcing it, is the primary reason many biopharmaceutical companies choose to outsource rather than build in-house capacity (Source: www.grandviewresearch.com). Sponsors should expect to negotiate pricing directly and confidentially with each CDMO based on batch size, containment tier, and contracted volume commitments.

Is there enough ADC manufacturing capacity to meet demand through 2026 and beyond? The evidence is mixed. Mordor Intelligence's ADC Drug CDMO Service Market forecast projects growth from $1.99 billion in 2026 to $6.21 billion by 2031 (Source: www.mordorintelligence.com), but a market-revenue forecast alone does not establish whether capacity is undersupplied or oversupplied. Program-specific capacity needs can vary even as aggregate industry capacity expands.

Which ADC CDMO is "best"? There is no single best ADC CDMO; the right choice depends on program stage, required containment tier, and desired scope of integration. Sponsors can evaluate Lonza and WuXi XDC alongside other candidates using their disclosed scale, commercial track record, program requirements, and directly comparable due-diligence information. Sponsors needing specialized HPAPI containment should compare payload-specific exposure limits and validated controls: CordenPharma cites capability down to the picogram-per-cubic-meter level, Sterling cites glove-box isolators below 2 ng/m3, and Axplora cites OEL below 30 ng/m3 (Source: cordenpharma.com) (Source: www.sterlingpharmasolutions.com) (Source: www.axplora.com). Sponsors wanting a single, four-site integrated program from mAb through fill-finish may evaluate Piramal's ADCelerate offering, while those preferring an alliance-based, best-of-breed model may evaluate AGC Biologics' Proveo partnership or Simtra's alliance with MilliporeSigma.

Conclusion

The ADC CDMO market as of August 2026 is defined less by a single dominant winner than by three coexisting and viable business models: the large, vertically integrated conjugation platforms represented by Lonza, WuXi XDC, and Catalent; the specialist bioconjugation houses represented by Piramal Pharma Solutions, Abzena, AGC Biologics' Proveo alliance, and Sterling Pharma Solutions; and the HPAPI and payload-linker specialists, including CordenPharma, Ajinomoto Bio-Pharma Services, Novasep/Axplora, and Simtra BioPharma Solutions, whose core expertise in containment down to the picogram and nanogram-per-cubic-meter range underpins the entire category. Samsung Biologics' rapid, capital-intensive entry demonstrates that the barriers to competing in this market, while real, are surmountable within roughly two years for a well-capitalized CDMO with existing biologics infrastructure.

The evidence assembled in this report, drawn from more than 40 distinct primary and independent sources, points to a market still in active capacity build-out rather than equilibrium. Market-size estimates from Grand View Research, Mordor Intelligence, Technavio, and Roots Analysis diverge by an order of magnitude depending on scope definition, underscoring that any single market-size figure for ADC contract manufacturing should be treated with caution. What is not in dispute is the direction of travel: FDA review designations for ADCs grew at a 73.3% compound annual rate between 2019 and 2024, 16 distinct ADC products had received FDA approval by August 2026, and multiple CDMO capacity expansions were disclosed between 2023 and 2026 (Source: pmc.ncbi.nlm.nih.gov) (Source: www.fda.gov).

Tags: adc cdmo comparison, antibody drug conjugate manufacturing, adc cdmo, hpapi containment, bioconjugation cdmo, adc contract manufacturing, cytotoxic payload manufacturing, adc manufacturing capacity, lonza adc, wuxi xdc

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