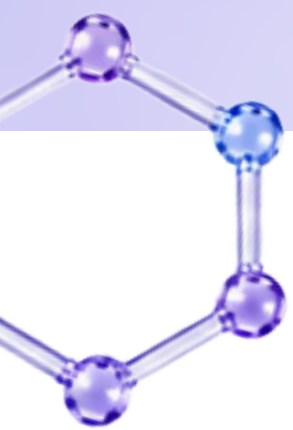


BEYOND THE TRENDS

**MAPPING CDMO
CAPABILITIES &
STRATEGIC
PARTNERSHIPS**

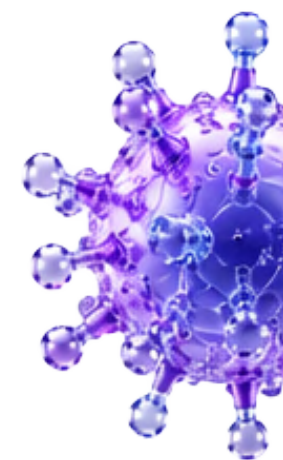


IMAPAC
IMAGINE YOUR IMPACT



Our previous edition examined the trends transforming biologics outsourcing, including the increasing demand for integrated end-to-end CDMO partnerships, rapid expansion of ADC capabilities, the evolving role of CDMOs as long-term strategic partners and more. We also featured **40 CDMOs to Watch**, highlighting leading organisations shaping the future of biologics manufacturing.

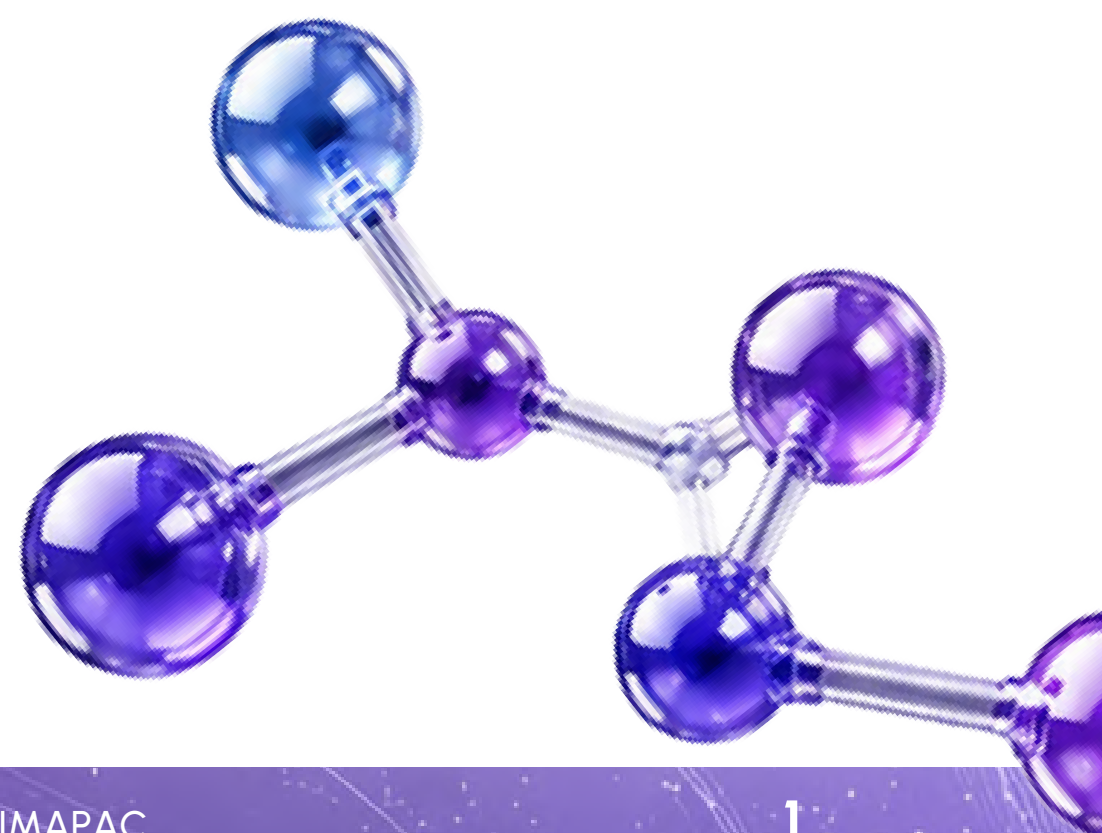
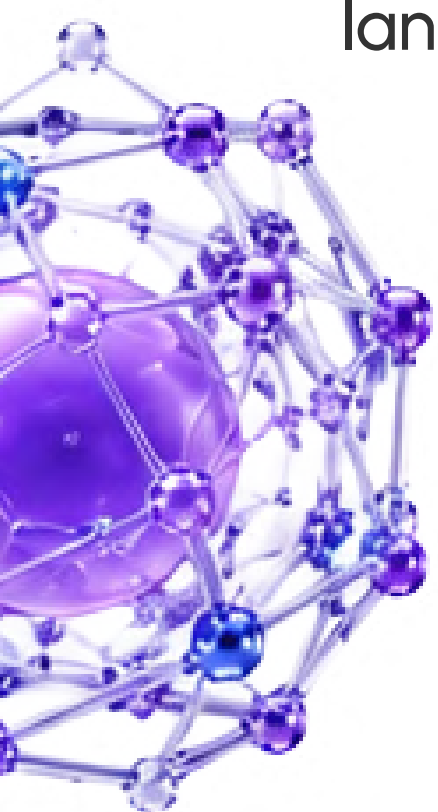
As outsourcing strategies continue to evolve, selecting the right manufacturing partner has become increasingly modality specific. Whether developing monoclonal antibodies, antibody-drug conjugates (ADCs), cell and gene therapies, vaccines or mRNA therapeutics, sponsors are seeking CDMOs with specialised expertise, advanced technologies and proven regulatory experience.



In this chapter, we move beyond market trends to examine the outsourcing ecosystem itself.

We begin by **highlighting leading CDMOs across key biologics modalities, providing a snapshot of their core capabilities and key strengths.** We then explore **real-world manufacturing partnerships between biopharmaceutical companies and CDMOs**, illustrating how organisations are collaborating to accelerate development, expand manufacturing capacity and commercialise next-generation therapies. Finally, we highlight recent manufacturing investments and facility expansions that are shaping future outsourcing capacity across Europe.

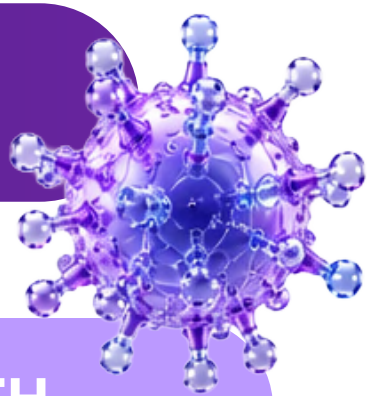
Together, these insights provide a practical overview of the companies, partnerships and investments defining today's biologics manufacturing landscape.



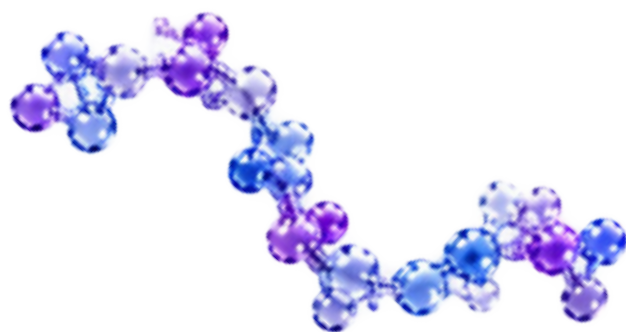
Monoclonal Antibodies (mAbs)

COMPANY	CORE CAPABILITY	KEY STRENGTH
Lonza	End-to-end biologics manufacturing	Global integrated platform
Boehringer Ingelheim BioXcellence	Mammalian cell culture manufacturing	Commercial-scale biologics
Rentschler Biopharma	Bioprocessing & manufacturing	Clinical-to-commercial scale-up
FUJIFILM Diosynth Biotechnologies	Process development & manufacturing	Large-scale biologics expertise
AGC Biologics	Monoclonal antibody development and manufacturing	Broad mAb service range with perfusion and fed-batch capabilities across global sites
SynCo Bio Partners	Biopharmaceutical development and manufacturing	Multi-platform biologics experience with mammalian and microbial systems
Mabion	Biotherapeutics manufacturing	mAb and recombinant protein focus suited to biologics programs
Northway Biotech	Bioprocess development and GMP manufacturing for biopharmaceuticals	Flexible end-to-end support for antibodies, from cell line development to GMP manufacturing
ProBioGen	Cell line development, process development, and GMP manufacturing	Strong antibodies and protein manufacturing capability with integrated CDMO services
3PBIOVIAN	Biologics CDMO services	Established GMP biologics manufacturing platform with European footprint

ADC Manufacturing



COMPANY	CORE CAPABILITY	KEY STRENGTH
Lonza	End-to-end ADC manufacturing.	Integrated ADC platform covering payloads, bioconjugation, and drug product supply from discovery through commercialisation.
Cerbios	Bioconjugation & HPAPI handling	Specialist ADC expertise
Piramal Pharma Solutions	ADC manufacturing & fill-finish	Integrated high-potency platform
Ajinomoto Bio-Pharma Services	ADC process development and conjugation platform	Proprietary microbial expression systems and high-potency aseptic fill-finish capabilities support reliable execution across complex, multistep ADC programs.
Axplora	End-to-end ADC manufacturing	End-to-end ADC platform covers payload-linker synthesis, HPAPI manufacturing, and bioconjugation; strong clinical and commercial production track record supports manufacturing resilience in Europe.
Abzena	Fully integrated ADC and bioconjugate development and manufacturing	ThioBridge® enables precise site-specific conjugation, while the integrated model supports scalability, consistency, and faster progression from early development to commercial launch.
Sterling Pharma Solutions	ADC bioconjugation and development	Flexible development support and European manufacturing base
Merck KGaA / MilliporeSigma		Integrated high-potency and conjugation capabilities supporting ADC development and manufacturing
BSP Pharmaceuticals	ADC conjugation and fill-finish under full containment	Integrated same-site ADC manufacturing from development to commercial supply
Evonik	ADC-enabling drug substance and parenteral delivery support	HPAPI, controlled-release, and sterile injectable platform that can support ADC programs

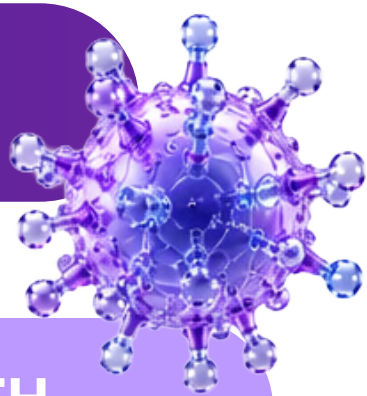


MODALITY-SPECIFIC CDMO LANDSCAPE

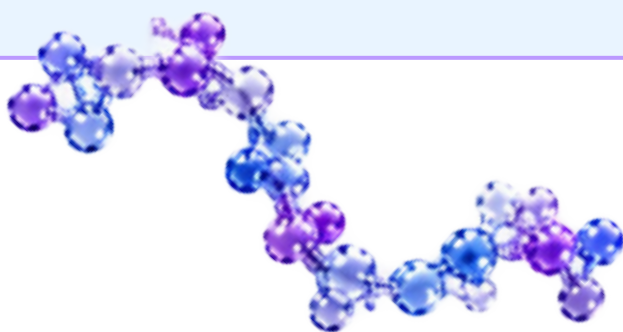
Cell & Gene Therapy / ATMPs

COMPANY	CORE CAPABILITY	KEY STRENGTH
Lonza	Cell and gene therapy manufacturing	Broad integrated CGT platform with clinical-to-commercial support
Oxford Biomedica	Viral vector manufacturing	Lentiviral expertise
Cell and Gene Therapy Catapult	Cell therapy process development and manufacturing	UK-based translational and manufacturing support for advanced therapies
RoslinCT	Cell therapy development and manufacturing	Specialist advanced-therapy CDMO with UK presence
Yposkesi	Viral vector manufacturing	Gene therapy manufacturing
NorthX Biologics	GMP biologics manufacturing	Advanced therapies expertise
Freeline Therapeutics / CDMO unit	Gene therapy manufacturing	Viral-vector and gene therapy program support
Cellular Origins	Cell therapy manufacturing automation and services	Automation-led cell therapy manufacturing model
ReciBioPharm	Cell and gene therapy development and manufacturing	Dedicated European advanced therapy CDMO platform
Miltenyi Biotec	Cell processing systems	Automated cell therapy manufacturing
Catalent	Cell and gene therapy manufacturing	Established global CDMO with strong CGT footprint
Evotec	Cell and gene therapy manufacturing	End-to-end cell therapy platform with GMP clinical manufacturing in Europe

Vaccines & mRNA



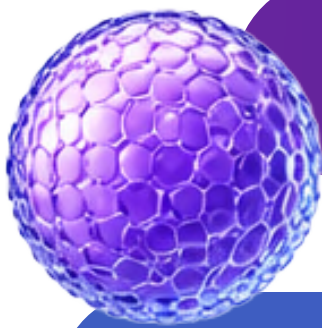
COMPANY	CORE CAPABILITY	KEY STRENGTH
Lonza	mRNA process development and GMP manufacturing	Comprehensive mRNA services with large-scale production and analytical support
Recipharm	mRNA development and manufacturing	Clinical-to-commercial mRNA manufacturing with formulation support
BioNTech	mRNA therapeutics and vaccines	In-house mRNA platform strength and vaccine development expertise
AGC Biologics	mRNA process development and GMP manufacturing	Comprehensive mRNA services from pDNA to LNP-formulated drug substance, with flexible R&D-to-commercial manufacturing support
CureVac	mRNA vaccine and therapeutic development	Pioneer in mRNA technology with a proprietary platform, in-house RNA manufacturing capabilities, and a strong focus on infectious disease and oncology programs
Rentschler Biopharma	Vaccine and biologics manufacturing	Strong GMP biologics base with growing relevance in advanced modalities
IDT Biologika	Vaccine manufacturing	Established vaccine CDMO with infectious disease and sterile production experience
Wacker Biotech	mRNA and recombinant protein manufacturing	European GMP manufacturing with nucleic acid and biologics capability
HALIX	Viral vector & protein manufacturing	Flexible GMP infrastructure
Catalent	Vaccine manufacturing & fill-finish	Global sterile manufacturing
Corden Pharma	Lipid nanoparticles & injectables	mRNA formulation expertise



MODALITY-SPECIFIC CDMO LANDSCAPE

Fill-Finish & Sterile Manufacturing

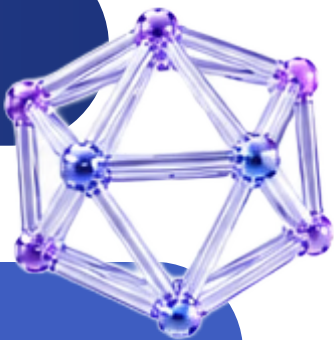
COMPANY	CORE CAPABILITY	KEY STRENGTH
Vetter	Aseptic fill-finish	Strong commercial injectable and prefilled syringe expertise
PCI Pharma Services	Injectable drug product services	Sterile packaging expertise
Catalent	Injectable manufacturing	Global sterile network
Recipharm	Sterile fill-finish and biologics drug product	Broad European footprint with aseptic and lyophilized dosage support
IDT Biologika	Sterile fill-finish and vaccine manufacturing	Established European sterile manufacturing and injectable expertise
Bavarian Nordic	Sterile fill-finish and vaccine manufacturing	Strong vaccine production and fill-finish capability
FUJIFILM Diosynth Biotechnologies	Sterile fill-finish and biologics drug product	Large-scale European manufacturing footprint with injectable support
Cenexi	Injectable sterile liquid products	Focused on sterile liquid manufacturing and quality control
Adragos Pharma	Sterile injectable fill-finish	EU-GMP and FDA-certified sterile fill-finish across Europe
Liof Pharma	Aseptic manufacturing and lyophilization	Specialist in sterile manufacturing and lyophilized injectables
Aenova	Sterile and aseptic manufacturing	Broad European dosage-form platform with sterile capabilities
Lonza	Sterile fill-finish for biologics and complex programs	Integrated biologics and drug product manufacturing support



ADC Partnerships

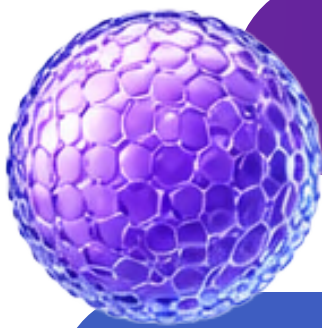
Sponsor / Biotech	CDMO Partner	Partnership Focus	Key Area
Pfizer	Lonza	Biologics & ADC manufacturing support	ADC manufacturing
Bicycle Therapeutics	Piramal Pharma Solutions	ADC clinical manufacturing	HPAPI & conjugation
Mersana Therapeutics	Cerbios	Bioconjugation manufacturing	ADC process development
AbbVie	Ajinomoto Bio-Pharma Services	Biologics & ADC support services	ADC outsourcing

Biologics Manufacturing Partnerships



Sponsor / Biotech	CDMO Partner	Partnership Focus	Key Area
Moderna	Lonza	Commercial manufacturing partnership	mRNA manufacturing
Bayer	Rentschler Biopharma	Biologics manufacturing collaboration	Commercial biologics
Sanofi	Vetter	Sterile fill-finish support	Injectable biologics
Amgen	FUJIFILM Diosynth Biotechnologies	Process development & manufacturing	Large-scale biologics

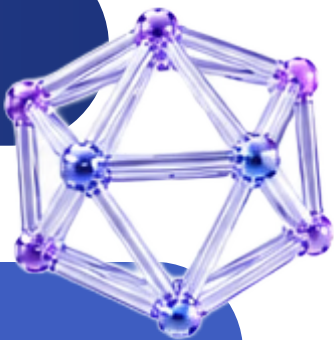




Cell & Gene Therapy / ATMP Collaborations

Sponsor / Biotech	CDMO Partner	Partnership Focus	Key Area
AstraZeneca	Oxford Biomedica	Viral vector manufacturing	Cell & gene therapy
bluebird bio	Miltenyi Biotec	Cell therapy manufacturing support	ATMP manufacturing
Rocket Pharmaceuticals	Yposkesi	Viral vector manufacturing partnership	Gene therapy
Adaptimmune	AGC Biologics	Cell therapy manufacturing	Advanced therapies

Vaccine & mRNA Partnerships



Sponsor / Biotech	CDMO Partner	Partnership Focus	Key Area
BioNTech	CordenPharma	Lipid nanoparticle manufacturing	mRNA production
Johnson & Johnson	Catalent	Vaccine fill-finish manufacturing	Sterile manufacturing
Valneva	HALIX	Vaccine manufacturing support	Viral vector manufacturing



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