

# Vertically Integrated CDMO Capabilities at a Glance

**USD 20.3B**

Global CDMO market, 2023

**USD 33.86B**

 Projected by 2030<sup>1</sup>
**+67%**

Projected growth



The demand for nucleic acid therapeutics (NATs) is rapidly expanding as the modalities are increasingly applied to conditions with large patient populations, such as cardiometabolic diseases. This rising demand is reflected in the global CDMO market for NATs, which was valued at USD 20.3 billion in 2023 and is projected to reach USD 33.86 billion by 2030.<sup>1</sup>

With this growth, the biopharmaceutical landscape faces the challenge of meeting this expanding demand for API, as unique manufacturing challenges put scalability, quality and speed to clinic at risk.

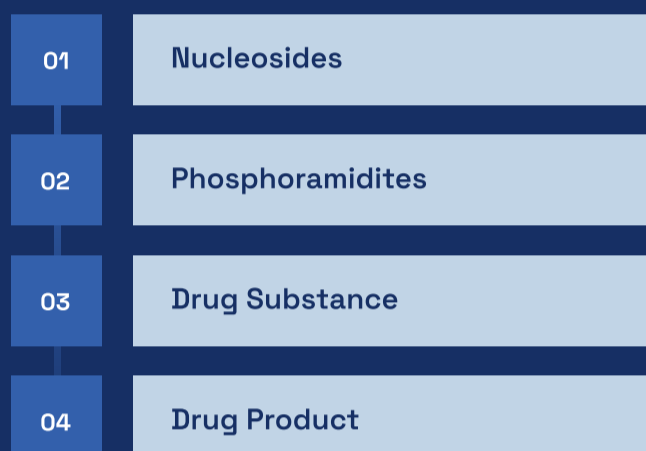
A vertically integrated supply model addresses these concerns by consolidating development from high-quality raw materials through to cGMP production and fill-finish.

## How a Vertically Integrated Supply Model Addresses Fragmentation

NAT manufacturing has traditionally relied on a fragmented supply chain, with multiple vendors individually responsible for specific steps such as raw materials production, cGMP drug substance, drug product manufacturing and analytical testing. With each handoff of materials or documentation between vendors, the risk of misalignment and delays increases.

A vertically integrated supply model streamlines the manufacturing process by consolidating these operations within a single organization, improving the security of tech transfers and enhancing efficiency.

### MANUFACTURING PATHWAY



## Manufacturing for all NAT Modalities

A vertically integrated supply model is capable of accommodating the distinct demands of each NAT modality:

### Oligonucleotide Therapeutics

Providing highly specialized starting materials and comprehensive knowledge of each stage to meet technical and regulatory needs.





### mRNA-based Products

Consolidating control over key inputs to ensure alignment of the entire workflow. Integrated management across stages allows developers to navigate complexity with agility.

### CRISPR-based Gene Editing Therapeutics

Expediting delivery of highly complex programs with end-to-end oversight to eliminate handoff risks.

## Why Choose A Vertically Integrated Supply Chain?

-  Direct tech transfers within one organization
-  Consistent quality across stages
-  Maintaining momentum for competitive speed to market
-  Cross-functional teams combining chemistry, biology, formulation, QA and analytics

## Securing Scalability for the Future with Vertical Integration

As NAT pipelines expand into large patient populations, API demand is anticipated to exceed the scale that fragmented manufacturing models were designed to support.

By consolidating the manufacturing process into a single end-to-end supply chain, developers can focus on delivering high-quality therapeutics ready for commercial success.

## Discover Your End-to-End CDMO Partner with Hongene

At Hongene, our vertically integrated supply model is designed to accelerate your therapeutic to market without compromising product quality or regulatory compliance. We believe that an effective CDMO is a collaborative partner who can scale development from early-stage programs to large-scale commercialization.

**Bring your RNA to life.**
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### References

Nucleic Acid Therapeutics CDMO Industry Outlook 2024–2030. GlobeNewswire. October 10, 2024. <https://www.globenewswire.com/news-release/2024/10/10/2961563/28124/en/Nucleic-Acid-Therapeutics-CDMO-Industry-Outlook-2024-2030.html>