Pharma Intermediates and CDMO Custom Synthesis

Outsourcing demand and capacity structure as molecules get harder

Base year	History	Forecast
2025	**2019–2025**	**2026–2033**
Regions	Segments	Formats
4	**4**	**PDF / Excel / PPT**

Abstract

This report covers the highest-value downstream of fine chemicals: pharma intermediates and custom synthesis (CDMO). It spans innovator intermediates, specialty APIs, peptide and oligonucleotide building blocks, and pharmaceutical excipients, and analyses the changing split between captive and merchant production.

The central judgement is that the moat has moved from capacity to quality systems and process development. Being selected as a supplier during early clinical phases locks in commercial-scale volume later, which makes the front-end process team more decisive than back-end reactor volume.

Key findings (excerpt)

- Total-scope CDMO was about USD 274.79 billion in 2025, reaching USD 503.82 billion by 2030 at a 12.9% CAGR (The Business Research Company); pharmaceutical contract manufacturing was USD 209.90 billion in 2025 and USD 311.95 billion by 2030, a 8.2% CAGR (MarketsandMarkets).
- The scopes are huge and not interchangeable: Grand View Research puts pharmaceutical CDMO at USD 166.0 billion in 2025, about 60% of total-scope CDMO, while intermediate custom synthesis is only USD 63.33 billion by 2032 (PW Consulting).
- Pharma and nutraceuticals are the largest fine chemicals downstream — APIs about 48% of 2026 product-type sales and specialty intermediates ~17% (Future Market Insights forecast).
- Rising molecular complexity keeps pushing outsourcing ratios higher, and new modalities such as peptides and oligonucleotides create structural demand for high-purity building blocks and dedicated capacity.
- Supplier choice is strongly path-dependent: replacing an early-clinical supplier at commercial scale is prohibitively costly, and quality systems, EHS records and audit pass rates are harder gates than capacity.

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CDMO and pharma contract manufacturing: definitions compared

Source and scope	Base-year size	Forecast year	Forecast size	CAGR
The Business Research Company（CDMO 全口径）	2,747.9 亿美元 (2025)	2030	5,038.2 亿美元	12.9%
MarketsandMarkets（医药合同生产）	2,099.0 亿美元 (2025)	2030	3,119.5 亿美元	8.2%
Grand View Research（医药 CDMO）	1,660.0 亿美元 (2025)	2033	2,936.0 亿美元	7.4%
PW Consulting（中间体定制合成）	—	2032	633.3 亿美元	8.56%

Total-scope CDMO, pharma contract manufacturing and intermediate custom synthesis are three different scopes and cannot be added or averaged.

Source: 各机构公开发布摘要，2025–2026

4 in total, all listed in the full edition

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Contents

1. 1. Scope: intermediates, APIs, building blocks and excipients
2. 2. Global market size and outsourcing ratio
3. 3. Captive versus merchant production structure
4. 4. New modalities: peptide and oligonucleotide building blocks
5. 5. Process routes: continuous flow, biocatalysis, green chemistry
6. 6. Supplier selection and switching costs
7. 7. Capacity footprint: China, India, Europe, North America
8. 8. Quality systems and regulatory compliance
9. 9. CDMO company profiles
10. 10. Risks: customer concentration, geopolitics, pricing pressure

Method and definitions

This brief is built from public sources: Chinese and English industry and consultancy reports, annual reports and prospectuses, customs and statistical series, and public capacity or expansion announcements by main participants. Where two sources disagree on the same metric, both figures are shown with the reason for the gap instead of being averaged. Amounts are in USD at nominal value unless stated; capacity is in 10k t/yr. Forecast window 2026–2033, base year 2025.

Data updated：{'zh': '半年度更新', 'en': 'Semi-annual'}

Coverage

- China
- India
- Europe
- North America

Excerpts below let you judge structure and methodology; the paid edition lists everything.

Main participants (excerpt)

- Lonza
- Evonik
- BASF
- Merck KGaA
- Johnson Matthey
- 药明康德系 / WuXi

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Sources (excerpt)

1. A The Business Research Company《CDMO Global Market Report》：2025 年 2,747.9 亿美元、2030 年 5,038.2 亿美元、CAGR 12.9%。https://www.thebusinessresearchcompany.com/report/contract-development-manufacturing-organizations-global-market-report（2026-11 访问）
2. B MarketsandMarkets《Pharmaceutical Contract Manufacturing》：2025 年 2,099.0 亿美元、2030 年 3,119.5 亿美元、CAGR 8.2%。https://www.marketsandmarkets.com/Market-Reports/pharmaceutical-contract-manufacturing-market-201524381.html（2026-11 访问）
3. C Grand View Research《Pharmaceutical CDMO Market》：2025 年 1,660.0 亿美元、2026 年 1,776.0 亿美元、2033 年 2,936.0 亿美元、CAGR 7.4%。https://www.grandviewresearch.com/industry-analysis/pharmaceutical-cdmo-market-report（2026-11 访问）

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