

Advances in Large Scale Biopharmaceutical Manufacturing and Scale-Up Production

A Survey of Industry Capacity

Preview

November 2003



BioPlan Associates, Inc.
15200 Shady Grove Road, Suite 202
Rockville, MD 20850 USA
301.921.9074

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Introduction

Based on the biotechnology industry pipeline, we can expect to see as many as 125 new drugs reaching the market over the next five to seven years. As the demand for production of biotherapeutics continues to grow, the question of whether current manufacturing capacity is sufficient to deal with the challenge becomes an important, strategic issue.

The ability to meet the demand, whether through in-house manufacturing or out-sourced contract manufacturing, carries long-term cost implications. Building production facilities, bringing new capacity on line, and establishing support services in these areas requires accurate market knowledge and lead-time.

As such, both biopharmaceutical producers and contract manufacturers maintain a keen interest in the current and future status of industry capacity and trends. This White Paper provides a quantitative assessment of industry capacity, and offers a view into potential industry bottlenecks that may develop over the next five years.

Methodology

BioPlan Associates surveyed responsible individuals at 100 biopharmaceutical manufacturers around the world. Using a web-based survey tool, we obtained and evaluated information regarding respondents' current capacity, and future capacity needs. We assessed respondents' projected reasons for bottlenecks, and their perception of how these bottlenecks might be resolved.

Eric S. Langer
Managing Partner
BioPlan Associates, Inc.



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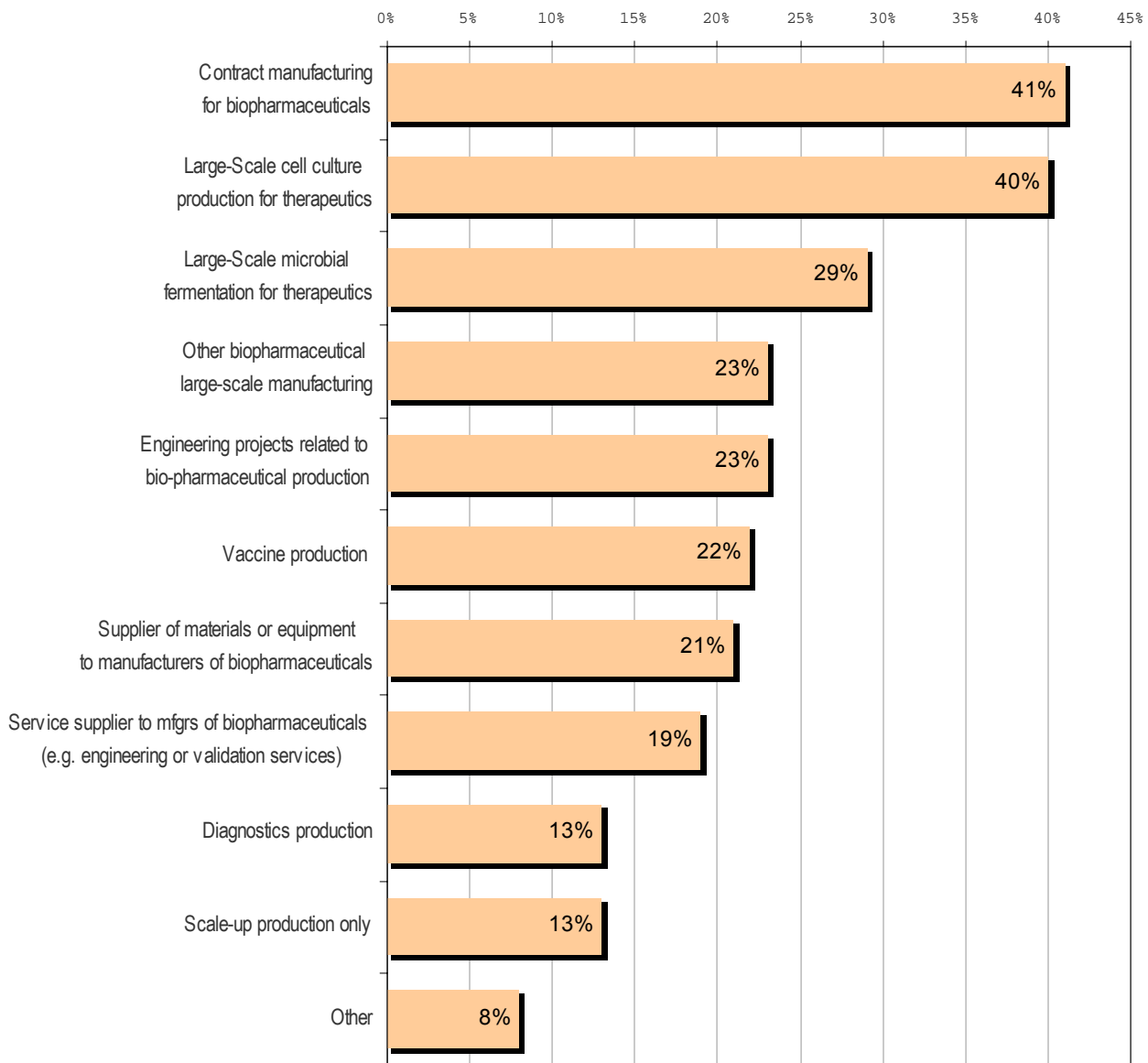
This study has been done in conjunction with the American Society for Microbiology. The ASM has identified biopharmaceutical production as an area in which objective technical and scientific assessment of current situations is required. As such the ASM has targeted this industry for a comprehensive, in-depth study, based on input from industry subject matter experts and observers.

Demographics

Respondents' Area of Involvement

Respondents to the survey were involved in contract manufacturing (41%), large scale cell culture production of biopharmaceuticals (40%), large scale microbial fermentation for therapeutics (29%), and other biopharmaceutical large-scale manufacturing (23%). Scale-up production was done by 13% of respondents.

Respondents' Areas of Industry Involvement





BioPlan Associates, Inc. PO Box 83565
Gaithersburg, MD 20883-3565 USA
301.921.9074

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