

Twitter Thread by Tar ■



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Of all the CDMO plays, I like Bio-Tech CDMOs ■ the best.

- 1■■ High barriers to entry
- 2■■ Long gestation periods
- 3■■ Demand that never seems to end
- 4■■ Hockey Stick Growth as molecules move from Phase 1 to Phase 3
- 5■■ Sticky Business and