

Cell & Gene Therapy Market - Global Outlook and Forecast 2020-2025

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global Cell and Gene Therapy Market Report

The global cell and gene therapy market by revenue is expected to grow at a CAGR of over 30.90% during the period 2019–2025.

The global cell and gene therapy market is one of the fastest-growing segments in the regenerative medicine market. The market is expected to grow at a faster pace during the forecast period. The demand can be attributed to the growing prevalence of several chronic diseases such as cancer, cartilage related problems, wounds, diabetic foot ulcer, genetic disorders, and other rare diseases across the globe. The prevalence of cancer and diabetes is increasing in the global population, which is influencing the growth of the market. There is a large unmet need in the treatment available, which is filled by cell and gene therapies. The market is growing due to the increased availability of funding from various public and private institutions. Besides, there is increased support from regulatory bodies for product approval. Several governments are creating awareness of cell and gene therapies in the population.

The following factors are likely to contribute to the growth of the cell and gene therapy market during the forecast period:

Increase in Strategic Acquisition Activities

Increased Funding for Cell & Gene Therapy Products

Expanding Applications of Cell and Gene Therapies

Increased in the Patient Pool

The study considers the present scenario of the cell and gene therapy market and its market dynamics for the period 2019-2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Cell And Gene Therapy Market Segmentation

The global cell and gene therapy market research report includes a detailed segmentation by product, disease, end-user, and geography. In 2019, the cell therapy segment accounted for a market share of over 53% in the global cell and gene therapy market. The segment is expected to grow at a steady rate during the forecast period due to the increase in the target population and the rise in the number of countries preferring cell therapies in their patients. Increased therapeutic benefits are attracting several countries to invest in this technology and conduct a high number of clinical trials. However, the lack of advanced infrastructure in developing countries is hindering the growth of the segment.

In 2019, the oncology segment accounted for a share of over 40% in the global cell and gene therapy market. Oncology has been one of the targets of intense research for the gene therapy procedures & approach. More than 60% of on-going gene therapy clinical trials are targeting cancer. The segment is expected to grow at a promising rate on account of the high prevalence of cancer diseases, especially in low and middle-income countries. The market is growing at a double-digit CAGR, which is expected to help the segment as many cell and gene therapy for cancer are commercially available.

The dermatology application segment in the cell and gene therapy includes wound care management among patients. Vendors are focusing on the development and commercialization of advanced wound care products for the treatment of chronic and acute wounds, thereby increasing the growth of the wound care market. The increased pervasiveness of diabetics is increasing acute and chronic wounds, including surgical wounds, pressure ulcers, diabetic foot ulcers, and other wounds.

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Segmentation by Product

Cell Therapy

Gene Therapy

Segmentation by Disease

Dermatology

Musculoskeletal

Oncology

Genetic Disorders

Others

Segmentation by End-user

Hospitality

Cancer Care Centers

Wound Care Centers

Ambulatory Surgical Centers

Others

INSIGHTS BY GEOGRAPHY

In 2019, North America accounted for a share of over 60% of the global cell and gene therapy market. There are more than 530 regenerative medicine companies, including cell and gene therapy manufacturing developers. The number of products approved in North America grew significantly in 2019, with developers filed for marketing authorization for 10+ regenerative medicines, many of which we expect to be approved in 2020. Within the next 1–2 years, the number of approved gene therapies is expected to double. The US and Canada are the major contributors to the cell and gene therapy market in North America. Regulatory bodies are supporting several investigational products, fast track approvals, RMAT designation for the faster approval of the product into the market. The alliance for regenerative medicine and Medicare and Medicaid is working together to bring the structured reimbursement channels for cell and gene therapies.

Segmentation by Geography

North America

US

Canada

Europe

UK

Germany

France

Spain

Italy

APAC

China

Japan

South Korea

Australia

India

Latin America

Brazil

Mexico

Middle East & Africa

Saudi Arabia

Turkey

South Africa

UAE

INSIGHTS BY VENDORS

The global cell and gene therapy market is highly dynamic and characterized by the presence of several global, regional, and local vendors offering a wide range of therapies. Dendreon, Gilead Sciences, Novartis, Organogenesis, Osiris Therapeutics, Vericel, Amgen, and Spark Therapeutics are the leading players in the market with significant shares. Vendors such as NuVasive, APAC Biotech, Nipro, Orthocell, bluebird

bio, J-TEC, and Terumo are the other prominent players in the market with a presence, especially in the cell therapy market. Most leading players are focusing on implementing strategies such as product launches and approvals, marketing and promotional activities, acquisitions, increased R&D investments, and strengthening their distribution networks to enhance their share and presence in the market.

Prominent Vendors

Gilead Sciences

Spark Therapeutics

Novartis

Organogenesis

Amgen

Osiris Therapeutics

Dendreon

Vericel

Other Prominent Vendors

Anterogen

Tego Sciences

Japan Tissue Engineering

JCR Pharmaceuticals

Medipost

MolMed

AVITA Medical

CollPlant

Biosolution

Stempeutics Research

Kolon Tissue Gene

Orchard Therapeutics

Sibiono GeneTech

NuVasive

Corestem

Pharmicell

Shanghai Sunway Biotech

RMS Regenerative Medical System

Takeda Pharmaceutical Company

CHIESI Farmaceutici

CO.DON

AnGes

GC Pharma

Human Stem Cells Institute

JW CreaGene

APAC Biotech

Nipro

Terumo

Orthocell

bluebird bio

KEY QUESTIONS ANSWERED

1. What is the cell and gene therapy market size and growth rate during the forecast period?
2. What are the factors impacting the growth of the cell and gene therapy market share?
3. How is the growth of the healthcare segment affecting the growth of the cell and gene therapy market?
4. Who are the leading vendors in the cell and gene therapy market, and what are their market shares?
5. Which product type/ end-user type/region is generating the largest revenue in the Asia Pacific region?

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Table 52 Global Cell & Gene Therapy Market by End-Users 2019?2025 (\$ million)

Table 53 Global Cell & Gene Therapy Market by End-Users 2019?2025 (%)

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