

Global Human NK Cell Cytotoxicity Assay Kits Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Human NK Cell Cytotoxicity Assay Kits market size is expected to reach \$ 60.27 million by 2032, rising at a market growth of 8.5% CAGR during the forecast period (2026-2032).

Human NK cell cytotoxicity assay kits are in vitro research products used to quantify the killing activity of primary human natural killer cells, expanded NK cells or CAR-NK cells against tumor and other target cells. Common methods include flow cytometry, luciferase-based luminescence, LDH release, fluorescence imaging and direct cell counting, with assay endpoints covering target-cell death, residual target-cell viability and cell-lysis signals after effector-target co-culture. Key upstream inputs include cell-tracking and viability dyes, luciferase and LDH reaction substrates, monoclonal antibodies, buffers, culture media, human NK cells, reporter target cells, microplates and packaging materials. Major downstream customers include universities, research institutes, hospital research platforms, antibody and immuno-oncology companies, NK and CAR-NK cell therapy developers, CROs and contract testing laboratories, with applications spanning basic NK-cell research, ADCC evaluation, cell therapy process development, potency testing, batch comparability and drug screening. Effective global production capacity in 2025 is estimated at approximately 68,000 kits, with sales of around 44,387 kits and an average ex-works price of approximately USD 740 per kit. The industry's overall gross margin is estimated at approximately 54%-68%.

The global market combines specialized NK-cell assay systems with broadly applicable cell-mediated cytotoxicity kits. NK-specific products generally distinguish effector cells from target cells and may additionally measure NK-cell phenotype, activation status and secreted proteins, making them particularly suitable for immuno-oncology and cell therapy development. General products are primarily based on CFSE/7-AAD,

DiOC18/PI or LDH-release methods and offer broader compatibility and lower operating costs. Premium platform-based products are often designed for dedicated flow-cytometry or imaging systems, supporting higher customer retention and contract value, while open-format kits can be used with instruments from multiple manufacturers and therefore reach a wider laboratory base.

Demand is being driven by NK and CAR-NK cell therapy development, monoclonal and bispecific antibody ADCC studies and immuno-oncology drug screening. Cell therapy developers need to compare killing activity across donors, culture processes, effector-to-target ratios, cryopreservation conditions and manufacturing batches, extending the role of target-cell killing assays from general research into process characterization, method development and potency assessment. FDA guidance for engineered lymphocyte products emphasizes biological activity and potency evaluation, while current EMA guidance requires potency testing of cell-based immunotherapy products to reflect relevant biological function. These expectations support greater adoption of standardized and validated cytotoxicity assays.

Non-radioactive methods have become the dominant technical route. Flow cytometry distinguishes effector cells, viable target cells and dead target cells at the single-cell level and is well suited to direct functional evaluation of NK and CAR-NK products. Luciferase-based methods provide relatively simple workflows, high sensitivity and strong compatibility with high-throughput antibody and drug screening. LDH-release assays are cost-effective and do not require reporter target cells, but they may be affected by spontaneous effector-cell death and culture-medium background. Future innovation is expected to focus on multiplex readouts, 384-well formats, standardized reporter target cells, real-time imaging, automated data analysis and assay compatibility with both suspension and adherent targets.

Market development remains constrained by limited harmonization among analytical methods, weak cross-laboratory comparability, donor-to-donor variation in primary NK cells and competition from internally assembled assays. Cytotoxicity results are also affected by target-cell type, effector-to-target ratio, co-culture duration, cell condition and the selected endpoint. A single killing result therefore often needs to be combined with CD107a degranulation, cytokine release, proliferation and phenotypic assays. Some premium kits also require dedicated instruments, increasing upfront investment and platform-switching costs. Over time, conventional dye- and LDH-based products are expected to face stronger price competition, while validated multiplex, automated and cell-therapy-oriented solutions should retain more attractive growth and margin profiles.

This report studies the global Human NK Cell Cytotoxicity Assay Kits production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Human NK Cell Cytotoxicity Assay Kits and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Human NK Cell Cytotoxicity Assay Kits that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Human NK Cell Cytotoxicity Assay Kits total production and demand, 2021-2032, (Units)

Global Human NK Cell Cytotoxicity Assay Kits total production value, 2021-2032, (USD Million)

Global Human NK Cell Cytotoxicity Assay Kits production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Human NK Cell Cytotoxicity Assay Kits consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Human NK Cell Cytotoxicity Assay Kits domestic production, consumption, key domestic manufacturers and share

Global Human NK Cell Cytotoxicity Assay Kits production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Human NK Cell Cytotoxicity Assay Kits production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Human NK Cell Cytotoxicity Assay Kits production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Human NK Cell Cytotoxicity Assay Kits market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Sartorius, BPS Bioscience, Cellular Technology Limited, Thermo Fisher Scientific, Danaher, Promega, Cell Signaling Technology, Revvity, Abnova, Jiangsu Hillgene Biopharma, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Human NK Cell Cytotoxicity Assay Kits market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Human NK Cell Cytotoxicity Assay Kits Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Human NK Cell Cytotoxicity Assay Kits Market, Segmentation by Type:

Flow Cytometry

Luminescence

Other

Global Human NK Cell Cytotoxicity Assay Kits Market, Segmentation by Kit Configuration:

Detection Reagent Kits

Reagent and Target Cell Kits

Other

Global Human NK Cell Cytotoxicity Assay Kits Market, Segmentation by Throughput:

Tube-based and Low-throughput

96-well Format

384-well and High-throughput

Global Human NK Cell Cytotoxicity Assay Kits Market, Segmentation by Application:

Academic and Research Institutions

Biotechnology and Pharmaceutical Companies

Other

Companies Profiled:

Sartorius

BPS Bioscience

Cellular Technology Limited

Thermo Fisher Scientific

Danaher

Promega

Cell Signaling Technology

Revvity

Abnova

Jiangsu Hillgene Biopharma

Key Questions Answered:

1. How big is the global Human NK Cell Cytotoxicity Assay Kits market?
2. What is the demand of the global Human NK Cell Cytotoxicity Assay Kits market?
3. What is the year over year growth of the global Human NK Cell Cytotoxicity Assay Kits market?
4. What is the production and production value of the global Human NK Cell Cytotoxicity Assay Kits market?
5. Who are the key producers in the global Human NK Cell Cytotoxicity Assay Kits market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Human NK Cell Cytotoxicity Assay Kits Introduction
- 1.2 World Human NK Cell Cytotoxicity Assay Kits Supply & Forecast
 - 1.2.1 World Human NK Cell Cytotoxicity Assay Kits Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Human NK Cell Cytotoxicity Assay Kits Production (2021-2032)
 - 1.2.3 World Human NK Cell Cytotoxicity Assay Kits Pricing Trends (2021-2032)
- 1.3 World Human NK Cell Cytotoxicity Assay Kits Production by Region (Based on Production Site)
 - 1.3.1 World Human NK Cell Cytotoxicity Assay Kits Production Value by Region (2021-2032)
 - 1.3.2 World Human NK Cell Cytotoxicity Assay Kits Production by Region (2021-2032)
 - 1.3.3 World Human NK Cell Cytotoxicity Assay Kits Average Price by Region (2021-2032)
 - 1.3.4 North America Human NK Cell Cytotoxicity Assay Kits Production (2021-2032)
 - 1.3.5 Europe Human NK Cell Cytotoxicity Assay Kits Production (2021-2032)
 - 1.3.6 China Human NK Cell Cytotoxicity Assay Kits Production (2021-2032)
 - 1.3.7 Japan Human NK Cell Cytotoxicity Assay Kits Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Human NK Cell Cytotoxicity Assay Kits Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Human NK Cell Cytotoxicity Assay Kits Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Human NK Cell Cytotoxicity Assay Kits Demand (2021-2032)
- 2.2 World Human NK Cell Cytotoxicity Assay Kits Consumption by Region
 - 2.2.1 World Human NK Cell Cytotoxicity Assay Kits Consumption by Region (2021-2026)
 - 2.2.2 World Human NK Cell Cytotoxicity Assay Kits Consumption Forecast by Region (2027-2032)
- 2.3 United States Human NK Cell Cytotoxicity Assay Kits Consumption (2021-2032)
- 2.4 China Human NK Cell Cytotoxicity Assay Kits Consumption (2021-2032)
- 2.5 Europe Human NK Cell Cytotoxicity Assay Kits Consumption (2021-2032)
- 2.6 Japan Human NK Cell Cytotoxicity Assay Kits Consumption (2021-2032)
- 2.7 South Korea Human NK Cell Cytotoxicity Assay Kits Consumption (2021-2032)

2.8 ASEAN Human NK Cell Cytotoxicity Assay Kits Consumption (2021-2032)

2.9 India Human NK Cell Cytotoxicity Assay Kits Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Human NK Cell Cytotoxicity Assay Kits Production Value by Manufacturer (2021-2026)

3.2 World Human NK Cell Cytotoxicity Assay Kits Production by Manufacturer (2021-2026)

3.3 World Human NK Cell Cytotoxicity Assay Kits Average Price by Manufacturer (2021-2026)

3.4 Human NK Cell Cytotoxicity Assay Kits Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global Human NK Cell Cytotoxicity Assay Kits Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for Human NK Cell Cytotoxicity Assay Kits in 2025

3.5.3 Global Concentration Ratios (CR8) for Human NK Cell Cytotoxicity Assay Kits in 2025

3.6 Human NK Cell Cytotoxicity Assay Kits Market: Overall Company Footprint Analysis

3.6.1 Human NK Cell Cytotoxicity Assay Kits Market: Region Footprint

3.6.2 Human NK Cell Cytotoxicity Assay Kits Market: Company Product Type Footprint

3.6.3 Human NK Cell Cytotoxicity Assay Kits Market: Company Product Application Footprint

3.7 Competitive Environment

3.7.1 Historical Structure of the Industry

3.7.2 Barriers of Market Entry

3.7.3 Factors of Competition

3.8 New Entrant and Capacity Expansion Plans

3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: Human NK Cell Cytotoxicity Assay Kits Production Value Comparison

4.1.1 United States VS China: Human NK Cell Cytotoxicity Assay Kits Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Human NK Cell Cytotoxicity Assay Kits Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Human NK Cell Cytotoxicity Assay Kits Production Comparison

4.2.1 United States VS China: Human NK Cell Cytotoxicity Assay Kits Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Human NK Cell Cytotoxicity Assay Kits Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Human NK Cell Cytotoxicity Assay Kits Consumption Comparison

4.3.1 United States VS China: Human NK Cell Cytotoxicity Assay Kits Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Human NK Cell Cytotoxicity Assay Kits Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Human NK Cell Cytotoxicity Assay Kits Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Human NK Cell Cytotoxicity Assay Kits Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Human NK Cell Cytotoxicity Assay Kits Production Value (2021-2026)

4.4.3 United States Based Manufacturers Human NK Cell Cytotoxicity Assay Kits Production (2021-2026)

4.5 China Based Human NK Cell Cytotoxicity Assay Kits Manufacturers and Market Share

4.5.1 China Based Human NK Cell Cytotoxicity Assay Kits Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Human NK Cell Cytotoxicity Assay Kits Production Value (2021-2026)

4.5.3 China Based Manufacturers Human NK Cell Cytotoxicity Assay Kits Production (2021-2026)

4.6 Rest of World Based Human NK Cell Cytotoxicity Assay Kits Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Human NK Cell Cytotoxicity Assay Kits Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Human NK Cell Cytotoxicity Assay Kits Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Human NK Cell Cytotoxicity Assay Kits Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Human NK Cell Cytotoxicity Assay Kits Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Flow Cytometry

5.2.2 Luminescence

5.2.3 Other

5.3 Market Segment by Type

5.3.1 World Human NK Cell Cytotoxicity Assay Kits Production by Type (2021-2032)

5.3.2 World Human NK Cell Cytotoxicity Assay Kits Production Value by Type (2021-2032)

5.3.3 World Human NK Cell Cytotoxicity Assay Kits Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY KIT CONFIGURATION

6.1 World Human NK Cell Cytotoxicity Assay Kits Market Size Overview by Kit Configuration: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Kit Configuration

6.2.1 Detection Reagent Kits

6.2.2 Reagent and Target Cell Kits

6.2.3 Other

6.3 Market Segment by Kit Configuration

6.3.1 World Human NK Cell Cytotoxicity Assay Kits Production by Kit Configuration (2021-2032)

6.3.2 World Human NK Cell Cytotoxicity Assay Kits Production Value by Kit Configuration (2021-2032)

6.3.3 World Human NK Cell Cytotoxicity Assay Kits Average Price by Kit Configuration (2021-2032)

7 MARKET ANALYSIS BY THROUGHPUT

7.1 World Human NK Cell Cytotoxicity Assay Kits Market Size Overview by Throughput: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Throughput

7.2.1 Tube-based and Low-throughput

7.2.2 96-well Format

7.2.3 384-well and High-throughput

7.3 Market Segment by Throughput

7.3.1 World Human NK Cell Cytotoxicity Assay Kits Production by Throughput

(2021-2032)

7.3.2 World Human NK Cell Cytotoxicity Assay Kits Production Value by Throughput

(2021-2032)

7.3.3 World Human NK Cell Cytotoxicity Assay Kits Average Price by Throughput

(2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Human NK Cell Cytotoxicity Assay Kits Market Size Overview by Application:
2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Academic and Research Institutions

8.2.2 Biotechnology and Pharmaceutical Companies

8.2.3 Other

8.3 Market Segment by Application

8.3.1 World Human NK Cell Cytotoxicity Assay Kits Production by Application

(2021-2032)

8.3.2 World Human NK Cell Cytotoxicity Assay Kits Production Value by Application

(2021-2032)

8.3.3 World Human NK Cell Cytotoxicity Assay Kits Average Price by Application

(2021-2032)

9 COMPANY PROFILES

9.1 Sartorius

9.1.1 Sartorius Details

9.1.2 Sartorius Major Business

9.1.3 Sartorius Human NK Cell Cytotoxicity Assay Kits Product and Services

9.1.4 Sartorius Human NK Cell Cytotoxicity Assay Kits Production, Price, Value, Gross
Margin and Market Share (2021-2026)

9.1.5 Sartorius Recent Developments/Updates

9.1.6 Sartorius Competitive Strengths & Weaknesses

9.2 BPS Bioscience

9.2.1 BPS Bioscience Details

9.2.2 BPS Bioscience Major Business

9.2.3 BPS Bioscience Human NK Cell Cytotoxicity Assay Kits Product and Services

9.2.4 BPS Bioscience Human NK Cell Cytotoxicity Assay Kits Production, Price, Value,
Gross Margin and Market Share (2021-2026)

9.2.5 BPS Bioscience Recent Developments/Updates

9.2.6 BPS Bioscience Competitive Strengths & Weaknesses

9.3 Cellular Technology Limited

9.3.1 Cellular Technology Limited Details

9.3.2 Cellular Technology Limited Major Business

9.3.3 Cellular Technology Limited Human NK Cell Cytotoxicity Assay Kits Product and Services

9.3.4 Cellular Technology Limited Human NK Cell Cytotoxicity Assay Kits Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 Cellular Technology Limited Recent Developments/Updates

9.3.6 Cellular Technology Limited Competitive Strengths & Weaknesses

9.4 Thermo Fisher Scientific

9.4.1 Thermo Fisher Scientific Details

9.4.2 Thermo Fisher Scientific Major Business

9.4.3 Thermo Fisher Scientific Human NK Cell Cytotoxicity Assay Kits Product and Services

9.4.4 Thermo Fisher Scientific Human NK Cell Cytotoxicity Assay Kits Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 Thermo Fisher Scientific Recent Developments/Updates

9.4.6 Thermo Fisher Scientific Competitive Strengths & Weaknesses

9.5 Danaher

9.5.1 Danaher Details

9.5.2 Danaher Major Business

9.5.3 Danaher Human NK Cell Cytotoxicity Assay Kits Product and Services

9.5.4 Danaher Human NK Cell Cytotoxicity Assay Kits Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 Danaher Recent Developments/Updates

9.5.6 Danaher Competitive Strengths & Weaknesses

9.6 Promega

9.6.1 Promega Details

9.6.2 Promega Major Business

9.6.3 Promega Human NK Cell Cytotoxicity Assay Kits Product and Services

9.6.4 Promega Human NK Cell Cytotoxicity Assay Kits Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 Promega Recent Developments/Updates

9.6.6 Promega Competitive Strengths & Weaknesses

9.7 Cell Signaling Technology

9.7.1 Cell Signaling Technology Details

9.7.2 Cell Signaling Technology Major Business

9.7.3 Cell Signaling Technology Human NK Cell Cytotoxicity Assay Kits Product and

Services

9.7.4 Cell Signaling Technology Human NK Cell Cytotoxicity Assay Kits Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 Cell Signaling Technology Recent Developments/Updates

9.7.6 Cell Signaling Technology Competitive Strengths & Weaknesses

9.8 Revvity

9.8.1 Revvity Details

9.8.2 Revvity Major Business

9.8.3 Revvity Human NK Cell Cytotoxicity Assay Kits Product and Services

9.8.4 Revvity Human NK Cell Cytotoxicity Assay Kits Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 Revvity Recent Developments/Updates

9.8.6 Revvity Competitive Strengths & Weaknesses

9.9 Abnova

9.9.1 Abnova Details

9.9.2 Abnova Major Business

9.9.3 Abnova Human NK Cell Cytotoxicity Assay Kits Product and Services

9.9.4 Abnova Human NK Cell Cytotoxicity Assay Kits Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 Abnova Recent Developments/Updates

9.9.6 Abnova Competitive Strengths & Weaknesses

9.10 Jiangsu Hillgene Biopharma

9.10.1 Jiangsu Hillgene Biopharma Details

9.10.2 Jiangsu Hillgene Biopharma Major Business

9.10.3 Jiangsu Hillgene Biopharma Human NK Cell Cytotoxicity Assay Kits Product and Services

9.10.4 Jiangsu Hillgene Biopharma Human NK Cell Cytotoxicity Assay Kits Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.10.5 Jiangsu Hillgene Biopharma Recent Developments/Updates

9.10.6 Jiangsu Hillgene Biopharma Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Human NK Cell Cytotoxicity Assay Kits Industry Chain

10.2 Human NK Cell Cytotoxicity Assay Kits Upstream Analysis

10.2.1 Human NK Cell Cytotoxicity Assay Kits Core Raw Materials

10.2.2 Main Manufacturers of Human NK Cell Cytotoxicity Assay Kits Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 Human NK Cell Cytotoxicity Assay Kits Production Mode

10.6 Human NK Cell Cytotoxicity Assay Kits Procurement Model

10.7 Human NK Cell Cytotoxicity Assay Kits Industry Sales Model and Sales Channels

10.7.1 Human NK Cell Cytotoxicity Assay Kits Sales Model

10.7.2 Human NK Cell Cytotoxicity Assay Kits Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Human NK Cell Cytotoxicity Assay Kits Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Human NK Cell Cytotoxicity Assay Kits Production Value by Region (2021-2026) & (USD Million)

Table 3. World Human NK Cell Cytotoxicity Assay Kits Production Value by Region (2027-2032) & (USD Million)

Table 4. World Human NK Cell Cytotoxicity Assay Kits Production Value Market Share by Region (2021-2026)

Table 5. World Human NK Cell Cytotoxicity Assay Kits Production Value Market Share by Region (2027-2032)

Table 6. World Human NK Cell Cytotoxicity Assay Kits Production by Region (2021-2026) & (Units)

Table 7. World Human NK Cell Cytotoxicity Assay Kits Production by Region (2027-2032) & (Units)

Table 8. World Human NK Cell Cytotoxicity Assay Kits Production Market Share by Region (2021-2026)

Table 9. World Human NK Cell Cytotoxicity Assay Kits Production Market Share by Region (2027-2032)

Table 10. World Human NK Cell Cytotoxicity Assay Kits Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World Human NK Cell Cytotoxicity Assay Kits Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. Human NK Cell Cytotoxicity Assay Kits Major Market Trends

Table 13. World Human NK Cell Cytotoxicity Assay Kits Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)

Table 14. World Human NK Cell Cytotoxicity Assay Kits Consumption by Region (2021-2026) & (Units)

Table 15. World Human NK Cell Cytotoxicity Assay Kits Consumption Forecast by Region (2027-2032) & (Units)

Table 16. World Human NK Cell Cytotoxicity Assay Kits Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Human NK Cell Cytotoxicity Assay Kits Producers in 2025

Table 18. World Human NK Cell Cytotoxicity Assay Kits Production by Manufacturer (2021-2026) & (Units)

Table 19. Production Market Share of Key Human NK Cell Cytotoxicity Assay Kits Producers in 2025

Table 20. World Human NK Cell Cytotoxicity Assay Kits Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global Human NK Cell Cytotoxicity Assay Kits Company Evaluation Quadrant

Table 22. World Human NK Cell Cytotoxicity Assay Kits Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Human NK Cell Cytotoxicity Assay Kits Production Site of Key Manufacturer

Table 24. Human NK Cell Cytotoxicity Assay Kits Market: Company Product Type Footprint

Table 25. Human NK Cell Cytotoxicity Assay Kits Market: Company Product Application Footprint

Table 26. Human NK Cell Cytotoxicity Assay Kits Competitive Factors

Table 27. Human NK Cell Cytotoxicity Assay Kits New Entrant and Capacity Expansion Plans

Table 28. Human NK Cell Cytotoxicity Assay Kits Mergers & Acquisitions Activity

Table 29. United States VS China Human NK Cell Cytotoxicity Assay Kits Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Human NK Cell Cytotoxicity Assay Kits Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China Human NK Cell Cytotoxicity Assay Kits Consumption Comparison, (2021 & 2025 & 2032) & (Units)

Table 32. United States Based Human NK Cell Cytotoxicity Assay Kits Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Human NK Cell Cytotoxicity Assay Kits Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Human NK Cell Cytotoxicity Assay Kits Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Human NK Cell Cytotoxicity Assay Kits Production (2021-2026) & (Units)

Table 36. United States Based Manufacturers Human NK Cell Cytotoxicity Assay Kits Production Market Share (2021-2026)

Table 37. China Based Human NK Cell Cytotoxicity Assay Kits Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Human NK Cell Cytotoxicity Assay Kits Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Human NK Cell Cytotoxicity Assay Kits Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Human NK Cell Cytotoxicity Assay Kits Production, (2021-2026) & (Units)

Table 41. China Based Manufacturers Human NK Cell Cytotoxicity Assay Kits Production Market Share (2021-2026)

Table 42. Rest of World Based Human NK Cell Cytotoxicity Assay Kits Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Human NK Cell Cytotoxicity Assay Kits Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Human NK Cell Cytotoxicity Assay Kits Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Human NK Cell Cytotoxicity Assay Kits Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers Human NK Cell Cytotoxicity Assay Kits Production Market Share (2021-2026)

Table 47. World Human NK Cell Cytotoxicity Assay Kits Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Human NK Cell Cytotoxicity Assay Kits Production by Type (2021-2026) & (Units)

Table 49. World Human NK Cell Cytotoxicity Assay Kits Production by Type (2027-2032) & (Units)

Table 50. World Human NK Cell Cytotoxicity Assay Kits Production Value by Type (2021-2026) & (USD Million)

Table 51. World Human NK Cell Cytotoxicity Assay Kits Production Value by Type (2027-2032) & (USD Million)

Table 52. World Human NK Cell Cytotoxicity Assay Kits Average Price by Type (2021-2026) & (US\$/Unit)

Table 53. World Human NK Cell Cytotoxicity Assay Kits Average Price by Type (2027-2032) & (US\$/Unit)

Table 54. World Human NK Cell Cytotoxicity Assay Kits Production Value by Kit Configuration, (USD Million), 2021 & 2025 & 2032

Table 55. World Human NK Cell Cytotoxicity Assay Kits Production by Kit Configuration (2021-2026) & (Units)

Table 56. World Human NK Cell Cytotoxicity Assay Kits Production by Kit Configuration (2027-2032) & (Units)

Table 57. World Human NK Cell Cytotoxicity Assay Kits Production Value by Kit Configuration (2021-2026) & (USD Million)

Table 58. World Human NK Cell Cytotoxicity Assay Kits Production Value by Kit Configuration (2027-2032) & (USD Million)

Table 59. World Human NK Cell Cytotoxicity Assay Kits Average Price by Kit

Configuration (2021-2026) & (US\$/Unit)

Table 60. World Human NK Cell Cytotoxicity Assay Kits Average Price by Kit Configuration (2027-2032) & (US\$/Unit)

Table 61. World Human NK Cell Cytotoxicity Assay Kits Production Value by Throughput, (USD Million), 2021 & 2025 & 2032

Table 62. World Human NK Cell Cytotoxicity Assay Kits Production by Throughput (2021-2026) & (Units)

Table 63. World Human NK Cell Cytotoxicity Assay Kits Production by Throughput (2027-2032) & (Units)

Table 64. World Human NK Cell Cytotoxicity Assay Kits Production Value by Throughput (2021-2026) & (USD Million)

Table 65. World Human NK Cell Cytotoxicity Assay Kits Production Value by Throughput (2027-2032) & (USD Million)

Table 66. World Human NK Cell Cytotoxicity Assay Kits Average Price by Throughput (2021-2026) & (US\$/Unit)

Table 67. World Human NK Cell Cytotoxicity Assay Kits Average Price by Throughput (2027-2032) & (US\$/Unit)

Table 68. World Human NK Cell Cytotoxicity Assay Kits Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Human NK Cell Cytotoxicity Assay Kits Production by Application (2021-2026) & (Units)

Table 70. World Human NK Cell Cytotoxicity Assay Kits Production by Application (2027-2032) & (Units)

Table 71. World Human NK Cell Cytotoxicity Assay Kits Production Value by Application (2021-2026) & (USD Million)

Table 72. World Human NK Cell Cytotoxicity Assay Kits Production Value by Application (2027-2032) & (USD Million)

Table 73. World Human NK Cell Cytotoxicity Assay Kits Average Price by Application (2021-2026) & (US\$/Unit)

Table 74. World Human NK Cell Cytotoxicity Assay Kits Average Price by Application (2027-2032) & (US\$/Unit)

Table 75. Sartorius Basic Information, Manufacturing Base and Competitors

Table 76. Sartorius Major Business

Table 77. Sartorius Human NK Cell Cytotoxicity Assay Kits Product and Services

Table 78. Sartorius Human NK Cell Cytotoxicity Assay Kits Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Sartorius Recent Developments/Updates

Table 80. Sartorius Competitive Strengths & Weaknesses

Table 81. BPS Bioscience Basic Information, Manufacturing Base and Competitors

Table 82. BPS Bioscience Major Business

Table 83. BPS Bioscience Human NK Cell Cytotoxicity Assay Kits Product and Services

Table 84. BPS Bioscience Human NK Cell Cytotoxicity Assay Kits Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. BPS Bioscience Recent Developments/Updates

Table 86. BPS Bioscience Competitive Strengths & Weaknesses

Table 87. Cellular Technology Limited Basic Information, Manufacturing Base and Competitors

Table 88. Cellular Technology Limited Major Business

Table 89. Cellular Technology Limited Human NK Cell Cytotoxicity Assay Kits Product and Services

Table 90. Cellular Technology Limited Human NK Cell Cytotoxicity Assay Kits Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Cellular Technology Limited Recent Developments/Updates

Table 92. Cellular Technology Limited Competitive Strengths & Weaknesses

Table 93. Thermo Fisher Scientific Basic Information, Manufacturing Base and Competitors

Table 94. Thermo Fisher Scientific Major Business

Table 95. Thermo Fisher Scientific Human NK Cell Cytotoxicity Assay Kits Product and Services

Table 96. Thermo Fisher Scientific Human NK Cell Cytotoxicity Assay Kits Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Thermo Fisher Scientific Recent Developments/Updates

Table 98. Thermo Fisher Scientific Competitive Strengths & Weaknesses

Table 99. Danaher Basic Information, Manufacturing Base and Competitors

Table 100. Danaher Major Business

Table 101. Danaher Human NK Cell Cytotoxicity Assay Kits Product and Services

Table 102. Danaher Human NK Cell Cytotoxicity Assay Kits Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Danaher Recent Developments/Updates

Table 104. Danaher Competitive Strengths & Weaknesses

Table 105. Promega Basic Information, Manufacturing Base and Competitors

Table 106. Promega Major Business

Table 107. Promega Human NK Cell Cytotoxicity Assay Kits Product and Services

Table 108. Promega Human NK Cell Cytotoxicity Assay Kits Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Promega Recent Developments/Updates

Table 110. Promega Competitive Strengths & Weaknesses

Table 111. Cell Signaling Technology Basic Information, Manufacturing Base and Competitors

Table 112. Cell Signaling Technology Major Business

Table 113. Cell Signaling Technology Human NK Cell Cytotoxicity Assay Kits Product and Services

Table 114. Cell Signaling Technology Human NK Cell Cytotoxicity Assay Kits Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. Cell Signaling Technology Recent Developments/Updates

Table 116. Cell Signaling Technology Competitive Strengths & Weaknesses

Table 117. Revvity Basic Information, Manufacturing Base and Competitors

Table 118. Revvity Major Business

Table 119. Revvity Human NK Cell Cytotoxicity Assay Kits Product and Services

Table 120. Revvity Human NK Cell Cytotoxicity Assay Kits Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Revvity Recent Developments/Updates

Table 122. Revvity Competitive Strengths & Weaknesses

Table 123. Abnova Basic Information, Manufacturing Base and Competitors

Table 124. Abnova Major Business

Table 125. Abnova Human NK Cell Cytotoxicity Assay Kits Product and Services

Table 126. Abnova Human NK Cell Cytotoxicity Assay Kits Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. Abnova Recent Developments/Updates

Table 128. Abnova Competitive Strengths & Weaknesses

Table 129. Jiangsu Hillgene Biopharma Basic Information, Manufacturing Base and Competitors

Table 130. Jiangsu Hillgene Biopharma Major Business

Table 131. Jiangsu Hillgene Biopharma Human NK Cell Cytotoxicity Assay Kits Product and Services

Table 132. Jiangsu Hillgene Biopharma Human NK Cell Cytotoxicity Assay Kits Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Jiangsu Hillgene Biopharma Recent Developments/Updates

Table 134. Jiangsu Hillgene Biopharma Competitive Strengths & Weaknesses

Table 135. Global Key Players of Human NK Cell Cytotoxicity Assay Kits Upstream
(Raw Materials)

Table 136. Global Human NK Cell Cytotoxicity Assay Kits Typical Customers

Table 137. Human NK Cell Cytotoxicity Assay Kits Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Human NK Cell Cytotoxicity Assay Kits Picture

Figure 2. World Human NK Cell Cytotoxicity Assay Kits Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Human NK Cell Cytotoxicity Assay Kits Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Human NK Cell Cytotoxicity Assay Kits Production (2021-2032) & (Units)

Figure 5. World Human NK Cell Cytotoxicity Assay Kits Average Price (2021-2032) & (US\$/Unit)

Figure 6. World Human NK Cell Cytotoxicity Assay Kits Production Value Market Share by Region (2021-2032)

Figure 7. World Human NK Cell Cytotoxicity Assay Kits Production Market Share by Region (2021-2032)

Figure 8. North America Human NK Cell Cytotoxicity Assay Kits Production (2021-2032) & (Units)

Figure 9. Europe Human NK Cell Cytotoxicity Assay Kits Production (2021-2032) & (Units)

Figure 10. China Human NK Cell Cytotoxicity Assay Kits Production (2021-2032) & (Units)

Figure 11. Japan Human NK Cell Cytotoxicity Assay Kits Production (2021-2032) & (Units)

Figure 12. Human NK Cell Cytotoxicity Assay Kits Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Human NK Cell Cytotoxicity Assay Kits Consumption (2021-2032) & (Units)

Figure 15. World Human NK Cell Cytotoxicity Assay Kits Consumption Market Share by Region (2021-2032)

Figure 16. United States Human NK Cell Cytotoxicity Assay Kits Consumption (2021-2032) & (Units)

Figure 17. China Human NK Cell Cytotoxicity Assay Kits Consumption (2021-2032) & (Units)

Figure 18. Europe Human NK Cell Cytotoxicity Assay Kits Consumption (2021-2032) & (Units)

Figure 19. Japan Human NK Cell Cytotoxicity Assay Kits Consumption (2021-2032) & (Units)

Figure 20. South Korea Human NK Cell Cytotoxicity Assay Kits Consumption (2021-2032) & (Units)

Figure 21. ASEAN Human NK Cell Cytotoxicity Assay Kits Consumption (2021-2032) & (Units)

Figure 22. India Human NK Cell Cytotoxicity Assay Kits Consumption (2021-2032) & (Units)

Figure 23. Producer Shipments of Human NK Cell Cytotoxicity Assay Kits by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Human NK Cell Cytotoxicity Assay Kits Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Human NK Cell Cytotoxicity Assay Kits Markets in 2025

Figure 26. United States VS China: Human NK Cell Cytotoxicity Assay Kits Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Human NK Cell Cytotoxicity Assay Kits Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Human NK Cell Cytotoxicity Assay Kits Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Human NK Cell Cytotoxicity Assay Kits Production Market Share 2025

Figure 30. China Based Manufacturers Human NK Cell Cytotoxicity Assay Kits Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Human NK Cell Cytotoxicity Assay Kits Production Market Share 2025

Figure 32. World Human NK Cell Cytotoxicity Assay Kits Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Human NK Cell Cytotoxicity Assay Kits Production Value Market Share by Type in 2025

Figure 34. Flow Cytometry

Figure 35. Luminescence

Figure 36. Other

Figure 37. World Human NK Cell Cytotoxicity Assay Kits Production Market Share by Type (2021-2032)

Figure 38. World Human NK Cell Cytotoxicity Assay Kits Production Value Market Share by Type (2021-2032)

Figure 39. World Human NK Cell Cytotoxicity Assay Kits Average Price by Type (2021-2032) & (US\$/Unit)

Figure 40. World Human NK Cell Cytotoxicity Assay Kits Production Value by Kit Configuration, (USD Million), 2021 & 2025 & 2032

Figure 41. World Human NK Cell Cytotoxicity Assay Kits Production Value Market Share by Kit Configuration in 2025

Figure 42. Detection Reagent Kits

Figure 43. Reagent and Target Cell Kits

Figure 44. Other

Figure 45. World Human NK Cell Cytotoxicity Assay Kits Production Market Share by Kit Configuration (2021-2032)

Figure 46. World Human NK Cell Cytotoxicity Assay Kits Production Value Market Share by Kit Configuration (2021-2032)

Figure 47. World Human NK Cell Cytotoxicity Assay Kits Average Price by Kit Configuration (2021-2032) & (US\$/Unit)

Figure 48. World Human NK Cell Cytotoxicity Assay Kits Production Value by Throughput, (USD Million), 2021 & 2025 & 2032

Figure 49. World Human NK Cell Cytotoxicity Assay Kits Production Value Market Share by Throughput in 2025

Figure 50. Tube-based and Low-throughput

Figure 51. 96-well Format

Figure 52. 384-well and High-throughput

Figure 53. World Human NK Cell Cytotoxicity Assay Kits Production Market Share by Throughput (2021-2032)

Figure 54. World Human NK Cell Cytotoxicity Assay Kits Production Value Market Share by Throughput (2021-2032)

Figure 55. World Human NK Cell Cytotoxicity Assay Kits Average Price by Throughput (2021-2032) & (US\$/Unit)

Figure 56. World Human NK Cell Cytotoxicity Assay Kits Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 57. World Human NK Cell Cytotoxicity Assay Kits Production Value Market Share by Application in 2025

Figure 58. Academic and Research Institutions

Figure 59. Biotechnology and Pharmaceutical Companies

Figure 60. Other

Figure 61. World Human NK Cell Cytotoxicity Assay Kits Production Market Share by Application (2021-2032)

Figure 62. World Human NK Cell Cytotoxicity Assay Kits Production Value Market Share by Application (2021-2032)

Figure 63. World Human NK Cell Cytotoxicity Assay Kits Average Price by Application (2021-2032) & (US\$/Unit)

Figure 64. Human NK Cell Cytotoxicity Assay Kits Industry Chain

Figure 65. Human NK Cell Cytotoxicity Assay Kits Procurement Model

Figure 66. Human NK Cell Cytotoxicity Assay Kits Sales Model

Figure 67. Human NK Cell Cytotoxicity Assay Kits Sales Channels, Direct Sales, and Distribution

Figure 68. Methodology

Figure 69. Research Process and Data Source

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