

Global iPSC-Derived Dopaminergic Neuron Therapy Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G6D01F6A356EEN.html>

Date: August 2026

Pages: 103

Price: US\$ 4,480.00 (Single User License)

ID: G6D01F6A356EEN

Abstracts

The global iPSC-Derived Dopaminergic Neuron Therapy market size is expected to reach \$ 445 million by 2032, rising at a market growth of 59.8% CAGR during the forecast period (2026-2032).

iPSC-Derived Dopaminergic Neuron Therapy refers to a regenerative cell therapy approach in which induced pluripotent stem cells (iPSCs) are differentiated under GMP conditions into midbrain dopaminergic neural progenitors or mature dopaminergic neurons, and then transplanted via stereotactic neurosurgical procedures into brain regions such as the striatum or putamen in patients with Parkinson's disease. The goal is to replace lost dopaminergic neurons, restore local dopamine signaling, and improve motor symptoms. This therapy can be categorized into autologous patient-specific products, allogeneic off-the-shelf products, HLA-matched cell lines, and gene-edited universal donor cells. Key critical quality attributes include cell purity, proportion of A9 midbrain dopaminergic lineage, control of residual undifferentiated cells, tumorigenicity risk, dosing consistency, cryopreservation and thaw stability, and post-transplant survival and functional integration. The overall gross margin is approximately 58%.

Demand for this therapy is primarily driven by the limitations of current Parkinson's disease treatments, including long-term fluctuations in drug efficacy, motor complications, and the lack of disease-modifying therapies. Dopaminergic neuron replacement directly targets the underlying loss of dopaminergic neurons and differs fundamentally from levodopa therapy, dopamine receptor agonists, or deep brain stimulation (DBS). It is particularly suited for moderate-to-advanced patients with insufficient drug response or those meeting surgical intervention criteria.

Product development is focused on cell sourcing strategy, immune compatibility,

manufacturing consistency, and post-transplant functional integration. Autologous approaches can reduce immune rejection and the need for long-term immunosuppression but involve longer production timelines and higher individualized manufacturing costs. Allogeneic off-the-shelf approaches offer scalability and standardization but require solutions for HLA matching, immune suppression management, residual undifferentiated cell control, and long-term safety monitoring. As Japan moves toward early commercialization, and programs in the United States, Europe, and China progress through regulatory or early clinical stages, competition is shifting from proof-of-concept validation toward manufacturing scale-up, quality release systems, and neurosurgical delivery platform optimization.

Regional opportunities are concentrated in major clinical centers in Japan, the United States, China, and Europe. In the short term, market expansion is constrained by surgical capacity, reimbursement pathways, long-term follow-up requirements, and regulatory timelines, resulting in a commercialization pace significantly slower than conventional pharmaceuticals. However, due to the high single-treatment value and potential for durable efficacy, companies that demonstrate stable real-world safety and sustained motor function improvement may establish strong barriers through indication segmentation, construction of allogeneic cell banks, and integration with specialized neurosurgical networks.

Report Scope

This report studies the global iPSC-Derived Dopaminergic Neuron Therapy demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for iPSC-Derived Dopaminergic Neuron Therapy, 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 iPSC-Derived Dopaminergic Neuron Therapy that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global iPSC-Derived Dopaminergic Neuron Therapy total market, 2021-2032, (USD Million)

Global iPSC-Derived Dopaminergic Neuron Therapy total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: iPSC-Derived Dopaminergic Neuron Therapy total market, key domestic companies, and share, (USD Million)

Global iPSC-Derived Dopaminergic Neuron Therapy revenue by player, revenue and market share 2021-2026, (USD Million)

Global iPSC-Derived Dopaminergic Neuron Therapy total market by Type, CAGR, 2021-2032, (USD Million)

Global iPSC-Derived Dopaminergic Neuron Therapy total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global iPSC-Derived Dopaminergic Neuron Therapy market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Sumitomo Pharma, RACTHERA, Aspen Neuroscience, XellSmart Bio-Pharmaceutical, Shanghai UniXell Biotechnology, iRegene Therapeutics, iCamuno Biotherapeutics, Kenai Therapeutics, Mass General Brigham, 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 iPSC-Derived Dopaminergic Neuron Therapy market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, 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 iPSC-Derived Dopaminergic Neuron Therapy Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global iPSC-Derived Dopaminergic Neuron Therapy Market, Segmentation by Type:

Autologous Patient-Specific Therapy

HLA-Matched Allogeneic Therapy

Standard Allogeneic Off-The-Shelf Therapy

Gene-Edited Universal Therapy

Other Donor Source Therapy

Global iPSC-Derived Dopaminergic Neuron Therapy Market, Segmentation by Cell Maturation Stage:

Early Neural Progenitor Product

Midbrain Dopaminergic Progenitor Product

Dopamine Neuron Precursor Product

Mature Dopaminergic Neuron Product

Other Cell Stage Product

Global iPSC-Derived Dopaminergic Neuron Therapy Market, Segmentation by Formulation and Delivery:

Fresh Cell Suspension

Cryopreserved Cell Suspension

Ready-to-Use Injection

Device-Assisted Stereotactic Implantation

Other Formulation and Delivery

Global iPSC-Derived Dopaminergic Neuron Therapy Market, Segmentation by Development Stage:

Commercial or Conditional Approval

Registrational or Phase III

Phase II

Phase I/II

Phase I

Preclinical

Global iPSC-Derived Dopaminergic Neuron Therapy Market, Segmentation by Application:

Advanced Parkinson's Disease

Early-Onset Parkinson's Disease

Idiopathic Parkinson's Disease

Levodopa-Inadequate Response Patients

Regenerative Neurology Clinical Research

Other Neurodegenerative Disease Research

Companies Profiled:

Sumitomo Pharma

RACTHERA

Aspen Neuroscience

XellSmart Bio-Pharmaceutical

Shanghai UniXell Biotechnology

iRegene Therapeutics

iCamuno Biotherapeutics

Kenai Therapeutics

Mass General Brigham

Key Questions Answered

1. How big is the global iPSC-Derived Dopaminergic Neuron Therapy market?
2. What is the demand of the global iPSC-Derived Dopaminergic Neuron Therapy market?
3. What is the year over year growth of the global iPSC-Derived Dopaminergic Neuron Therapy market?
4. What is the total value of the global iPSC-Derived Dopaminergic Neuron Therapy market?
5. Who are the Major Players in the global iPSC-Derived Dopaminergic Neuron Therapy market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

1.1 iPSC-Derived Dopaminergic Neuron Therapy Introduction

1.2 World iPSC-Derived Dopaminergic Neuron Therapy Market Size & Forecast (2021 & 2025 & 2032)

1.3 World iPSC-Derived Dopaminergic Neuron Therapy Total Market by Region (by Headquarter Location)

1.3.1 World iPSC-Derived Dopaminergic Neuron Therapy Market Size by Region (2021-2032), (by Headquarter Location)

1.3.2 United States Based Company iPSC-Derived Dopaminergic Neuron Therapy Revenue (2021-2032)

1.3.3 China Based Company iPSC-Derived Dopaminergic Neuron Therapy Revenue (2021-2032)

1.3.4 Europe Based Company iPSC-Derived Dopaminergic Neuron Therapy Revenue (2021-2032)

1.3.5 Japan Based Company iPSC-Derived Dopaminergic Neuron Therapy Revenue (2021-2032)

1.3.6 South Korea Based Company iPSC-Derived Dopaminergic Neuron Therapy Revenue (2021-2032)

1.3.7 ASEAN Based Company iPSC-Derived Dopaminergic Neuron Therapy Revenue (2021-2032)

1.3.8 India Based Company iPSC-Derived Dopaminergic Neuron Therapy Revenue (2021-2032)

1.4 Market Drivers, Restraints and Trends

1.4.1 iPSC-Derived Dopaminergic Neuron Therapy Market Drivers

1.4.2 Factors Affecting Demand

1.4.3 Major Market Trends

2 DEMAND SUMMARY

2.1 World iPSC-Derived Dopaminergic Neuron Therapy Consumption Value (2021-2032)

2.2 World iPSC-Derived Dopaminergic Neuron Therapy Consumption Value by Region

2.2.1 World iPSC-Derived Dopaminergic Neuron Therapy Consumption Value by Region (2021-2026)

2.2.2 World iPSC-Derived Dopaminergic Neuron Therapy Consumption Value Forecast by Region (2027-2032)

2.3 United States iPSC-Derived Dopaminergic Neuron Therapy Consumption Value (2021-2032)

2.4 China iPSC-Derived Dopaminergic Neuron Therapy Consumption Value (2021-2032)

2.5 Europe iPSC-Derived Dopaminergic Neuron Therapy Consumption Value (2021-2032)

2.6 Japan iPSC-Derived Dopaminergic Neuron Therapy Consumption Value (2021-2032)

2.7 South Korea iPSC-Derived Dopaminergic Neuron Therapy Consumption Value (2021-2032)

2.8 ASEAN iPSC-Derived Dopaminergic Neuron Therapy Consumption Value (2021-2032)

2.9 India iPSC-Derived Dopaminergic Neuron Therapy Consumption Value (2021-2032)

3 WORLD IPSC-DERIVED DOPAMINERGIC NEURON THERAPY COMPANIES COMPETITIVE ANALYSIS

3.1 World iPSC-Derived Dopaminergic Neuron Therapy Revenue by Player (2021-2026)

3.2 Industry Rank and Concentration Rate (CR)

3.2.1 Global iPSC-Derived Dopaminergic Neuron Therapy Industry Rank of Major Players

3.2.2 Global Concentration Ratios (CR4) for iPSC-Derived Dopaminergic Neuron Therapy in 2025

3.2.3 Global Concentration Ratios (CR8) for iPSC-Derived Dopaminergic Neuron Therapy in 2025

3.3 iPSC-Derived Dopaminergic Neuron Therapy Company Evaluation Quadrant

3.4 iPSC-Derived Dopaminergic Neuron Therapy Market: Overall Company Footprint Analysis

3.4.1 iPSC-Derived Dopaminergic Neuron Therapy Market: Region Footprint

3.4.2 iPSC-Derived Dopaminergic Neuron Therapy Market: Company Product Type Footprint

3.4.3 iPSC-Derived Dopaminergic Neuron Therapy Market: Company Product Application Footprint

3.5 Competitive Environment

3.5.1 Historical Structure of the Industry

3.5.2 Barriers of Market Entry

3.5.3 Factors of Competition

3.6 Mergers & Acquisitions Activity

4 UNITED STATES VS CHINA VS REST OF WORLD (BY HEADQUARTER LOCATION)

4.1 United States VS China: iPSC-Derived Dopaminergic Neuron Therapy Revenue Comparison (by Headquarter Location)

4.1.1 United States VS China: iPSC-Derived Dopaminergic Neuron Therapy Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)

4.1.2 United States VS China: iPSC-Derived Dopaminergic Neuron Therapy Revenue Market Share Comparison (2021 & 2025 & 2032)

4.2 United States Based Companies VS China Based Companies: iPSC-Derived Dopaminergic Neuron Therapy Consumption Value Comparison

4.2.1 United States VS China: iPSC-Derived Dopaminergic Neuron Therapy Consumption Value Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: iPSC-Derived Dopaminergic Neuron Therapy Consumption Value Market Share Comparison (2021 & 2025 & 2032)

4.3 United States Based iPSC-Derived Dopaminergic Neuron Therapy Companies and Market Share, 2021-2026

4.3.1 United States Based iPSC-Derived Dopaminergic Neuron Therapy Companies, Headquarters (States, Country)

4.3.2 United States Based Companies iPSC-Derived Dopaminergic Neuron Therapy Revenue, (2021-2026)

4.4 China Based Companies iPSC-Derived Dopaminergic Neuron Therapy Revenue and Market Share, 2021-2026

4.4.1 China Based iPSC-Derived Dopaminergic Neuron Therapy Companies, Company Headquarters (Province, Country)

4.4.2 China Based Companies iPSC-Derived Dopaminergic Neuron Therapy Revenue, (2021-2026)

4.5 Rest of World Based iPSC-Derived Dopaminergic Neuron Therapy Companies and Market Share, 2021-2026

4.5.1 Rest of World Based iPSC-Derived Dopaminergic Neuron Therapy Companies, Headquarters (Province, Country)

4.5.2 Rest of World Based Companies iPSC-Derived Dopaminergic Neuron Therapy Revenue (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World iPSC-Derived Dopaminergic Neuron Therapy Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

- 5.2.1 Autologous Patient-Specific Therapy
- 5.2.2 HLA-Matched Allogeneic Therapy
- 5.2.3 Standard Allogeneic Off-The-Shelf Therapy
- 5.2.4 Gene-Edited Universal Therapy
- 5.2.5 Other Donor Source Therapy

5.3 Market Segment by Type

- 5.3.1 World iPSC-Derived Dopaminergic Neuron Therapy Market Size by Type (2021-2026)
- 5.3.2 World iPSC-Derived Dopaminergic Neuron Therapy Market Size by Type (2027-2032)
- 5.3.3 World iPSC-Derived Dopaminergic Neuron Therapy Market Size Market Share by Type (2027-2032)

6 MARKET ANALYSIS BY CELL MATURATION STAGE

6.1 World iPSC-Derived Dopaminergic Neuron Therapy Market Size Overview by Cell Maturation Stage: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Cell Maturation Stage

- 6.2.1 Early Neural Progenitor Product
- 6.2.2 Midbrain Dopaminergic Progenitor Product
- 6.2.3 Dopamine Neuron Precursor Product
- 6.2.4 Mature Dopaminergic Neuron Product
- 6.2.5 Other Cell Stage Product

6.3 Market Segment by Cell Maturation Stage

- 6.3.1 World iPSC-Derived Dopaminergic Neuron Therapy Market Size by Cell Maturation Stage (2021-2026)
- 6.3.2 World iPSC-Derived Dopaminergic Neuron Therapy Market Size by Cell Maturation Stage (2027-2032)
- 6.3.3 World iPSC-Derived Dopaminergic Neuron Therapy Market Size Market Share by Cell Maturation Stage (2027-2032)

7 MARKET ANALYSIS BY FORMULATION AND DELIVERY

7.1 World iPSC-Derived Dopaminergic Neuron Therapy Market Size Overview by Formulation and Delivery: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Formulation and Delivery

- 7.2.1 Fresh Cell Suspension
- 7.2.2 Cryopreserved Cell Suspension

7.2.3 Ready-to-Use Injection

7.2.4 Device-Assisted Stereotactic Implantation

7.2.5 Other Formulation and Delivery

7.3 Market Segment by Formulation and Delivery

7.3.1 World iPSC-Derived Dopaminergic Neuron Therapy Market Size by Formulation and Delivery (2021-2026)

7.3.2 World iPSC-Derived Dopaminergic Neuron Therapy Market Size by Formulation and Delivery (2027-2032)

7.3.3 World iPSC-Derived Dopaminergic Neuron Therapy Market Size Market Share by Formulation and Delivery (2027-2032)

8 MARKET ANALYSIS BY DEVELOPMENT STAGE

8.1 World iPSC-Derived Dopaminergic Neuron Therapy Market Size Overview by Development Stage: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Development Stage

8.2.1 Commercial or Conditional Approval

8.2.2 Registrational or Phase III

8.2.3 Phase II

8.2.4 Phase I/II

8.2.5 Phase I

8.2.6 Preclinical

8.3 Market Segment by Development Stage

8.3.1 World iPSC-Derived Dopaminergic Neuron Therapy Market Size by Development Stage (2021-2026)

8.3.2 World iPSC-Derived Dopaminergic Neuron Therapy Market Size by Development Stage (2027-2032)

8.3.3 World iPSC-Derived Dopaminergic Neuron Therapy Market Size Market Share by Development Stage (2027-2032)

9 MARKET ANALYSIS BY APPLICATION

9.1 World iPSC-Derived Dopaminergic Neuron Therapy Market Size Overview by Application: 2021 VS 2025 VS 2032

9.2 Segment Introduction by Application

9.2.1 Advanced Parkinson's Disease

9.2.2 Early-Onset Parkinson's Disease

9.2.3 Idiopathic Parkinson's Disease

9.2.4 Levodopa-Inadequate Response Patients

9.2.5 Regenerative Neurology Clinical Research

9.2.6 Other Neurodegenerative Disease Research

9.3 Market Segment by Application

9.3.1 World iPSC-Derived Dopaminergic Neuron Therapy Market Size by Application (2021-2026)

9.3.2 World iPSC-Derived Dopaminergic Neuron Therapy Market Size by Application (2027-2032)

9.3.3 World iPSC-Derived Dopaminergic Neuron Therapy Market Size Market Share by Application (2021-2032)

10 COMPANY PROFILES

10.1 Sumitomo Pharma

10.1.1 Sumitomo Pharma Details

10.1.2 Sumitomo Pharma Major Business

10.1.3 Sumitomo Pharma iPSC-Derived Dopaminergic Neuron Therapy Product and Services

10.1.4 Sumitomo Pharma iPSC-Derived Dopaminergic Neuron Therapy Revenue, Gross Margin and Market Share (2021-2026)

10.1.5 Sumitomo Pharma Recent Developments/Updates

10.1.6 Sumitomo Pharma Competitive Strengths & Weaknesses

10.2 RACTHERA

10.2.1 RACTHERA Details

10.2.2 RACTHERA Major Business

10.2.3 RACTHERA iPSC-Derived Dopaminergic Neuron Therapy Product and Services

10.2.4 RACTHERA iPSC-Derived Dopaminergic Neuron Therapy Revenue, Gross Margin and Market Share (2021-2026)

10.2.5 RACTHERA Recent Developments/Updates

10.2.6 RACTHERA Competitive Strengths & Weaknesses

10.3 Aspen Neuroscience

10.3.1 Aspen Neuroscience Details

10.3.2 Aspen Neuroscience Major Business

10.3.3 Aspen Neuroscience iPSC-Derived Dopaminergic Neuron Therapy Product and Services

10.3.4 Aspen Neuroscience iPSC-Derived Dopaminergic Neuron Therapy Revenue, Gross Margin and Market Share (2021-2026)

10.3.5 Aspen Neuroscience Recent Developments/Updates

10.3.6 Aspen Neuroscience Competitive Strengths & Weaknesses

10.4 XellSmart Bio-Pharmaceutical

10.4.1 XellSmart Bio-Pharmaceutical Details

10.4.2 XellSmart Bio-Pharmaceutical Major Business

10.4.3 XellSmart Bio-Pharmaceutical iPSC-Derived Dopaminergic Neuron Therapy Product and Services

10.4.4 XellSmart Bio-Pharmaceutical iPSC-Derived Dopaminergic Neuron Therapy Revenue, Gross Margin and Market Share (2021-2026)

10.4.5 XellSmart Bio-Pharmaceutical Recent Developments/Updates

10.4.6 XellSmart Bio-Pharmaceutical Competitive Strengths & Weaknesses

10.5 Shanghai UniXell Biotechnology

10.5.1 Shanghai UniXell Biotechnology Details

10.5.2 Shanghai UniXell Biotechnology Major Business

10.5.3 Shanghai UniXell Biotechnology iPSC-Derived Dopaminergic Neuron Therapy Product and Services

10.5.4 Shanghai UniXell Biotechnology iPSC-Derived Dopaminergic Neuron Therapy Revenue, Gross Margin and Market Share (2021-2026)

10.5.5 Shanghai UniXell Biotechnology Recent Developments/Updates

10.5.6 Shanghai UniXell Biotechnology Competitive Strengths & Weaknesses

10.6 iRegene Therapeutics

10.6.1 iRegene Therapeutics Details

10.6.2 iRegene Therapeutics Major Business

10.6.3 iRegene Therapeutics iPSC-Derived Dopaminergic Neuron Therapy Product and Services

10.6.4 iRegene Therapeutics iPSC-Derived Dopaminergic Neuron Therapy Revenue, Gross Margin and Market Share (2021-2026)

10.6.5 iRegene Therapeutics Recent Developments/Updates

10.6.6 iRegene Therapeutics Competitive Strengths & Weaknesses

10.7 iCamuno Biotherapeutics

10.7.1 iCamuno Biotherapeutics Details

10.7.2 iCamuno Biotherapeutics Major Business

10.7.3 iCamuno Biotherapeutics iPSC-Derived Dopaminergic Neuron Therapy Product and Services

10.7.4 iCamuno Biotherapeutics iPSC-Derived Dopaminergic Neuron Therapy Revenue, Gross Margin and Market Share (2021-2026)

10.7.5 iCamuno Biotherapeutics Recent Developments/Updates

10.7.6 iCamuno Biotherapeutics Competitive Strengths & Weaknesses

10.8 Kenai Therapeutics

10.8.1 Kenai Therapeutics Details

10.8.2 Kenai Therapeutics Major Business

10.8.3 Kenai Therapeutics iPSC-Derived Dopaminergic Neuron Therapy Product and Services

10.8.4 Kenai Therapeutics iPSC-Derived Dopaminergic Neuron Therapy Revenue, Gross Margin and Market Share (2021-2026)

10.8.5 Kenai Therapeutics Recent Developments/Updates

10.8.6 Kenai Therapeutics Competitive Strengths & Weaknesses

10.9 Mass General Brigham

10.9.1 Mass General Brigham Details

10.9.2 Mass General Brigham Major Business

10.9.3 Mass General Brigham iPSC-Derived Dopaminergic Neuron Therapy Product and Services

10.9.4 Mass General Brigham iPSC-Derived Dopaminergic Neuron Therapy Revenue, Gross Margin and Market Share (2021-2026)

10.9.5 Mass General Brigham Recent Developments/Updates

10.9.6 Mass General Brigham Competitive Strengths & Weaknesses

11 INDUSTRY CHAIN ANALYSIS

11.1 iPSC-Derived Dopaminergic Neuron Therapy Industry Chain

11.2 iPSC-Derived Dopaminergic Neuron Therapy Upstream Analysis

11.3 iPSC-Derived Dopaminergic Neuron Therapy Midstream Analysis

11.4 iPSC-Derived Dopaminergic Neuron Therapy Downstream Analysis

12 RESEARCH FINDINGS AND CONCLUSION

13 APPENDIX

13.1 Methodology

13.2 Research Process and Data Source

13.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World iPSC-Derived Dopaminergic Neuron Therapy Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Table 2. World iPSC-Derived Dopaminergic Neuron Therapy Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)

Table 3. World iPSC-Derived Dopaminergic Neuron Therapy Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)

Table 4. World iPSC-Derived Dopaminergic Neuron Therapy Revenue Market Share by Region (2021-2026), (by Headquarter Location)

Table 5. World iPSC-Derived Dopaminergic Neuron Therapy Revenue Market Share by Region (2027-2032), (by Headquarter Location)

Table 6. Major Market Trends

Table 7. World iPSC-Derived Dopaminergic Neuron Therapy Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)

Table 8. World iPSC-Derived Dopaminergic Neuron Therapy Consumption Value by Region (2021-2026) & (USD Million)

Table 9. World iPSC-Derived Dopaminergic Neuron Therapy Consumption Value Forecast by Region (2027-2032) & (USD Million)

Table 10. World iPSC-Derived Dopaminergic Neuron Therapy Revenue by Player (2021-2026) & (USD Million)

Table 11. Revenue Market Share of Key iPSC-Derived Dopaminergic Neuron Therapy Players in 2025

Table 12. World iPSC-Derived Dopaminergic Neuron Therapy Industry Rank of Major Player, Based on Revenue in 2025

Table 13. Global iPSC-Derived Dopaminergic Neuron Therapy Company Evaluation Quadrant

Table 14. Head Office of Key iPSC-Derived Dopaminergic Neuron Therapy Players

Table 15. iPSC-Derived Dopaminergic Neuron Therapy Market: Company Product Type Footprint

Table 16. iPSC-Derived Dopaminergic Neuron Therapy Market: Company Product Application Footprint

Table 17. iPSC-Derived Dopaminergic Neuron Therapy Mergers & Acquisitions Activity

Table 18. United States VS China iPSC-Derived Dopaminergic Neuron Therapy Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 19. United States VS China iPSC-Derived Dopaminergic Neuron Therapy Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 20. United States Based iPSC-Derived Dopaminergic Neuron Therapy Companies, Headquarters (States, Country)

Table 21. United States Based Companies iPSC-Derived Dopaminergic Neuron Therapy Revenue, (2021-2026) & (USD Million)

Table 22. United States Based Companies iPSC-Derived Dopaminergic Neuron Therapy Revenue Market Share (2021-2026)

Table 23. China Based iPSC-Derived Dopaminergic Neuron Therapy Companies, Headquarters (Province, Country)

Table 24. China Based Companies iPSC-Derived Dopaminergic Neuron Therapy Revenue, (2021-2026) & (USD Million)

Table 25. China Based Companies iPSC-Derived Dopaminergic Neuron Therapy Revenue Market Share (2021-2026)

Table 26. Rest of World Based iPSC-Derived Dopaminergic Neuron Therapy Companies, Headquarters (Province, Country)

Table 27. Rest of World Based Companies iPSC-Derived Dopaminergic Neuron Therapy Revenue (2021-2026) & (USD Million)

Table 28. Rest of World Based Companies iPSC-Derived Dopaminergic Neuron Therapy Revenue Market Share (2021-2026)

Table 29. World iPSC-Derived Dopaminergic Neuron Therapy Market Size by Type, (USD Million), 2021 & 2025 & 2032

Table 30. World iPSC-Derived Dopaminergic Neuron Therapy Market Size Value by Type (2021-2026) & (USD Million)

Table 31. World iPSC-Derived Dopaminergic Neuron Therapy Market Size by Type (2027-2032) & (USD Million)

Table 32. World iPSC-Derived Dopaminergic Neuron Therapy Market Size by Cell Maturation Stage, (USD Million), 2021 & 2025 & 2032

Table 33. World iPSC-Derived Dopaminergic Neuron Therapy Market Size Value by Cell Maturation Stage (2021-2026) & (USD Million)

Table 34. World iPSC-Derived Dopaminergic Neuron Therapy Market Size by Cell Maturation Stage (2027-2032) & (USD Million)

Table 35. World iPSC-Derived Dopaminergic Neuron Therapy Market Size by Formulation and Delivery, (USD Million), 2021 & 2025 & 2032

Table 36. World iPSC-Derived Dopaminergic Neuron Therapy Market Size Value by Formulation and Delivery (2021-2026) & (USD Million)

Table 37. World iPSC-Derived Dopaminergic Neuron Therapy Market Size by Formulation and Delivery (2027-2032) & (USD Million)

Table 38. World iPSC-Derived Dopaminergic Neuron Therapy Market Size by Development Stage, (USD Million), 2021 & 2025 & 2032

Table 39. World iPSC-Derived Dopaminergic Neuron Therapy Market Size Value by

Development Stage (2021-2026) & (USD Million)

Table 40. World iPSC-Derived Dopaminergic Neuron Therapy Market Size by Development Stage (2027-2032) & (USD Million)

Table 41. World iPSC-Derived Dopaminergic Neuron Therapy Market Size by Application, (USD Million), 2021 & 2025 & 2032

Table 42. World iPSC-Derived Dopaminergic Neuron Therapy Market Size by Application (2021-2026) & (USD Million)

Table 43. World iPSC-Derived Dopaminergic Neuron Therapy Market Size by Application (2027-2032) & (USD Million)

Table 44. Sumitomo Pharma Basic Information, Manufacturing Base and Competitors

Table 45. Sumitomo Pharma Major Business

Table 46. Sumitomo Pharma iPSC-Derived Dopaminergic Neuron Therapy Product and Services

Table 47. Sumitomo Pharma iPSC-Derived Dopaminergic Neuron Therapy Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 48. Sumitomo Pharma Recent Developments/Updates

Table 49. Sumitomo Pharma Competitive Strengths & Weaknesses

Table 50. RACTHERA Basic Information, Manufacturing Base and Competitors

Table 51. RACTHERA Major Business

Table 52. RACTHERA iPSC-Derived Dopaminergic Neuron Therapy Product and Services

Table 53. RACTHERA iPSC-Derived Dopaminergic Neuron Therapy Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 54. RACTHERA Recent Developments/Updates

Table 55. RACTHERA Competitive Strengths & Weaknesses

Table 56. Aspen Neuroscience Basic Information, Manufacturing Base and Competitors

Table 57. Aspen Neuroscience Major Business

Table 58. Aspen Neuroscience iPSC-Derived Dopaminergic Neuron Therapy Product and Services

Table 59. Aspen Neuroscience iPSC-Derived Dopaminergic Neuron Therapy Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 60. Aspen Neuroscience Recent Developments/Updates

Table 61. Aspen Neuroscience Competitive Strengths & Weaknesses

Table 62. XellSmart Bio-Pharmaceutical Basic Information, Manufacturing Base and Competitors

Table 63. XellSmart Bio-Pharmaceutical Major Business

Table 64. XellSmart Bio-Pharmaceutical iPSC-Derived Dopaminergic Neuron Therapy Product and Services

Table 65. XellSmart Bio-Pharmaceutical iPSC-Derived Dopaminergic Neuron Therapy

Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 66. XellSmart Bio-Pharmaceutical Recent Developments/Updates

Table 67. XellSmart Bio-Pharmaceutical Competitive Strengths & Weaknesses

Table 68. Shanghai UniXell Biotechnology Basic Information, Manufacturing Base and Competitors

Table 69. Shanghai UniXell Biotechnology Major Business

Table 70. Shanghai UniXell Biotechnology iPSC-Derived Dopaminergic Neuron Therapy Product and Services

Table 71. Shanghai UniXell Biotechnology iPSC-Derived Dopaminergic Neuron Therapy Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 72. Shanghai UniXell Biotechnology Recent Developments/Updates

Table 73. Shanghai UniXell Biotechnology Competitive Strengths & Weaknesses

Table 74. iRegene Therapeutics Basic Information, Manufacturing Base and Competitors

Table 75. iRegene Therapeutics Major Business

Table 76. iRegene Therapeutics iPSC-Derived Dopaminergic Neuron Therapy Product and Services

Table 77. iRegene Therapeutics iPSC-Derived Dopaminergic Neuron Therapy Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 78. iRegene Therapeutics Recent Developments/Updates

Table 79. iRegene Therapeutics Competitive Strengths & Weaknesses

Table 80. iCamuno Biotherapeutics Basic Information, Manufacturing Base and Competitors

Table 81. iCamuno Biotherapeutics Major Business

Table 82. iCamuno Biotherapeutics iPSC-Derived Dopaminergic Neuron Therapy Product and Services

Table 83. iCamuno Biotherapeutics iPSC-Derived Dopaminergic Neuron Therapy Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 84. iCamuno Biotherapeutics Recent Developments/Updates

Table 85. iCamuno Biotherapeutics Competitive Strengths & Weaknesses

Table 86. Kenai Therapeutics Basic Information, Manufacturing Base and Competitors

Table 87. Kenai Therapeutics Major Business

Table 88. Kenai Therapeutics iPSC-Derived Dopaminergic Neuron Therapy Product and Services

Table 89. Kenai Therapeutics iPSC-Derived Dopaminergic Neuron Therapy Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 90. Kenai Therapeutics Recent Developments/Updates

Table 91. Kenai Therapeutics Competitive Strengths & Weaknesses

Table 92. Mass General Brigham Basic Information, Manufacturing Base and

Competitors

Table 93. Mass General Brigham Major Business

Table 94. Mass General Brigham iPSC-Derived Dopaminergic Neuron Therapy Product and Services

Table 95. Mass General Brigham iPSC-Derived Dopaminergic Neuron Therapy Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 96. Mass General Brigham Recent Developments/Updates

Table 97. Mass General Brigham Competitive Strengths & Weaknesses

Table 98. Global Key Players of iPSC-Derived Dopaminergic Neuron Therapy Upstream (Raw Materials)

Table 99. Global iPSC-Derived Dopaminergic Neuron Therapy Typical Customers

List Of Figures

LIST OF FIGURES

Figure 1. iPSC-Derived Dopaminergic Neuron Therapy Picture

Figure 2. World iPSC-Derived Dopaminergic Neuron Therapy Total Revenue: 2021 & 2025 & 2032, (USD Million)

Figure 3. World iPSC-Derived Dopaminergic Neuron Therapy Total Revenue (2021-2032) & (USD Million)

Figure 4. World iPSC-Derived Dopaminergic Neuron Therapy Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Figure 5. World iPSC-Derived Dopaminergic Neuron Therapy Revenue Market Share by Region (2021-2032), (by Headquarter Location)

Figure 6. United States Based Company iPSC-Derived Dopaminergic Neuron Therapy Revenue (2021-2032) & (USD Million)

Figure 7. China Based Company iPSC-Derived Dopaminergic Neuron Therapy Revenue (2021-2032) & (USD Million)

Figure 8. Europe Based Company iPSC-Derived Dopaminergic Neuron Therapy Revenue (2021-2032) & (USD Million)

Figure 9. Japan Based Company iPSC-Derived Dopaminergic Neuron Therapy Revenue (2021-2032) & (USD Million)

Figure 10. South Korea Based Company iPSC-Derived Dopaminergic Neuron Therapy Revenue (2021-2032) & (USD Million)

Figure 11. ASEAN Based Company iPSC-Derived Dopaminergic Neuron Therapy Revenue (2021-2032) & (USD Million)

Figure 12. India Based Company iPSC-Derived Dopaminergic Neuron Therapy Revenue (2021-2032) & (USD Million)

Figure 13. iPSC-Derived Dopaminergic Neuron Therapy Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World iPSC-Derived Dopaminergic Neuron Therapy Consumption Value (2021-2032) & (USD Million)

Figure 16. World iPSC-Derived Dopaminergic Neuron Therapy Consumption Value Market Share by Region (2021-2032)

Figure 17. United States iPSC-Derived Dopaminergic Neuron Therapy Consumption Value (2021-2032) & (USD Million)

Figure 18. China iPSC-Derived Dopaminergic Neuron Therapy Consumption Value (2021-2032) & (USD Million)

Figure 19. Europe iPSC-Derived Dopaminergic Neuron Therapy Consumption Value (2021-2032) & (USD Million)

Figure 20. Japan iPSC-Derived Dopaminergic Neuron Therapy Consumption Value (2021-2032) & (USD Million)

Figure 21. South Korea iPSC-Derived Dopaminergic Neuron Therapy Consumption Value (2021-2032) & (USD Million)

Figure 22. ASEAN iPSC-Derived Dopaminergic Neuron Therapy Consumption Value (2021-2032) & (USD Million)

Figure 23. India iPSC-Derived Dopaminergic Neuron Therapy Consumption Value (2021-2032) & (USD Million)

Figure 24. Producer Shipments of iPSC-Derived Dopaminergic Neuron Therapy by Player Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for iPSC-Derived Dopaminergic Neuron Therapy Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for iPSC-Derived Dopaminergic Neuron Therapy Markets in 2025

Figure 27. United States VS China: iPSC-Derived Dopaminergic Neuron Therapy Revenue Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: iPSC-Derived Dopaminergic Neuron Therapy Consumption Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. World iPSC-Derived Dopaminergic Neuron Therapy Market Size by Type, (USD Million), 2021 & 2025 & 2032

Figure 30. World iPSC-Derived Dopaminergic Neuron Therapy Market Size Market Share by Type in 2025

Figure 31. Autologous Patient-Specific Therapy

Figure 32. HLA-Matched Allogeneic Therapy

Figure 33. Standard Allogeneic Off-The-Shelf Therapy

Figure 34. Gene-Edited Universal Therapy

Figure 35. Other Donor Source Therapy

Figure 36. World iPSC-Derived Dopaminergic Neuron Therapy Market Size Market Share by Type (2021-2032)

Figure 37. World iPSC-Derived Dopaminergic Neuron Therapy Market Size by Cell Maturation Stage, (USD Million), 2021 & 2025 & 2032

Figure 38. World iPSC-Derived Dopaminergic Neuron Therapy Market Size Market Share by Cell Maturation Stage in 2025

Figure 39. Early Neural Progenitor Product

Figure 40. Midbrain Dopaminergic Progenitor Product

Figure 41. Dopamine Neuron Precursor Product

Figure 42. Mature Dopaminergic Neuron Product

Figure 43. Other Cell Stage Product

Figure 44. World iPSC-Derived Dopaminergic Neuron Therapy Market Size Market

Share by Cell Maturation Stage (2021-2032)

Figure 45. World iPSC-Derived Dopaminergic Neuron Therapy Market Size by Formulation and Delivery, (USD Million), 2021 & 2025 & 2032

Figure 46. World iPSC-Derived Dopaminergic Neuron Therapy Market Size Market Share by Formulation and Delivery in 2025

Figure 47. Fresh Cell Suspension

Figure 48. Cryopreserved Cell Suspension

Figure 49. Ready-to-Use Injection

Figure 50. Device-Assisted Stereotactic Implantation

Figure 51. Other Formulation and Delivery

Figure 52. World iPSC-Derived Dopaminergic Neuron Therapy Market Size Market Share by Formulation and Delivery (2021-2032)

Figure 53. World iPSC-Derived Dopaminergic Neuron Therapy Market Size by Development Stage, (USD Million), 2021 & 2025 & 2032

Figure 54. World iPSC-Derived Dopaminergic Neuron Therapy Market Size Market Share by Development Stage in 2025

Figure 55. Commercial or Conditional Approval

Figure 56. Registrational or Phase III

Figure 57. Phase II

Figure 58. Phase I/II

Figure 59. Phase I

Figure 60. Preclinical

Figure 61. World iPSC-Derived Dopaminergic Neuron Therapy Market Size Market Share by Development Stage (2021-2032)

Figure 62. World iPSC-Derived Dopaminergic Neuron Therapy Market Size by Application, (USD Million), 2021 & 2025 & 2032

Figure 63. World iPSC-Derived Dopaminergic Neuron Therapy Market Size Market Share by Application in 2025

Figure 64. Advanced Parkinson's Disease

Figure 65. Early-Onset Parkinson's Disease

Figure 66. Idiopathic Parkinson's Disease

Figure 67. Levodopa-Inadequate Response Patients

Figure 68. Regenerative Neurology Clinical Research

Figure 69. Other Neurodegenerative Disease Research

Figure 70. World iPSC-Derived Dopaminergic Neuron Therapy Market Size Market Share by Application (2021-2032)

Figure 71. iPSC-Derived Dopaminergic Neuron Therapy Industrial Chain

Figure 72. Methodology

Figure 73. Research Process and Data Source

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