

Global iPSC-Derived Natural Killer Cells Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global iPSC-Derived Natural Killer Cells market size was valued at US\$ 170 million in 2025 and is forecast to a readjusted size of US\$ 1106 million by 2032 with a CAGR of 30.3% during review period.

iPSC-Derived Natural Killer (NK) Cells refer to NK-like immune effector cells generated from induced pluripotent stem cells (iPSCs) through sequential processes including hematopoietic differentiation, NK cell maturation, expansion, purification, and quality control. These cells can be applied in cancer immunotherapy, B-cell depletion research for autoimmune diseases, infectious disease modeling, and cell therapy manufacturing process development. Key advantages include a standardized cell source, strong batch-to-batch consistency, and high amenability to multi-gene engineering at the iPSC stage, such as CAR insertion, CD16 enhancement, IL-15 expression, and immune-evasion modifications. These cells also support cryopreserved off-the-shelf production. The product category is currently mainly positioned in research-use products, CDMO process platforms, and clinical-stage therapeutic candidates. The overall gross margin is approximately 60%.

The evolution of cancer immunotherapy from autologous CAR-T toward allogeneic, off-the-shelf, and repeat-dose cell therapies is driving iPSC-derived NK cells to become a key next-generation modality. Their core value lies in enabling scalable production from a single master cell bank, thereby reducing donor variability and manufacturing scheduling constraints. In addition, iPSC-derived NK cells can be combined with monoclonal antibodies, bispecific or multispecific NK cell engagers, CAR constructs, and other immune-modulating strategies, enabling applications across hematologic

malignancies, solid tumors, and B-cell-mediated autoimmune diseases.

Competitive dynamics are shifting from basic NK cell generation toward advanced cell engineering design, GMP-scale manufacturing, post-thaw functional activity, and batch consistency control. Leading companies typically introduce multi-gene engineering at the iPSC stage, followed by closed-system suspension culture, automated differentiation processes, and standardized quality control to improve manufacturability. In the near term, commercial value is concentrated in clinical-grade cell banks, process development services, CDMO manufacturing, and clinical trial supply. Long-term success depends on demonstrating durable efficacy, safety, and improved tumor infiltration capability, particularly in solid tumor indications.

North America remains the dominant region for clinical translation and capital investment, while Japan, Australia, and China are advancing rapidly in iPSC cell banking, regulatory exploration, and domestic clinical programs. Key uncertainties include long-term safety, residual undifferentiated iPSC control, immune rejection risk, scalability costs, and regulatory approval pathways. If engineering strategies and manufacturing economics continue to improve, iPSC-derived NK cells are expected to establish a differentiated position within the allogeneic cell therapy landscape.

Report Scope

This report is a detailed and comprehensive analysis for global iPSC-Derived Natural Killer Cells market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global iPSC-Derived Natural Killer Cells market size and forecasts, in consumption value (\$ Million), sales quantity (K Dose), and average selling prices (US\$/Dose), 2021-2032

Global iPSC-Derived Natural Killer Cells market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Dose), and average selling prices (US\$/Dose), 2021-2032

Global iPSC-Derived Natural Killer Cells market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Dose), and average selling prices (US\$/Dose), 2021-2032

Global iPSC-Derived Natural Killer Cells market shares of main players, shipments in revenue (\$ Million), sales quantity (K Dose), and ASP (US\$/Dose), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries

- To assess the growth potential for iPSC-Derived Natural Killer Cells

- To forecast future growth in each product and end-use market

- To assess competitive factors affecting the marketplace

This report profiles key players in the global iPSC-Derived Natural Killer Cells market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Fate Therapeutics, Century Therapeutics, Cartherics, Nuwacell Biotech, HebeCell, Healios, Cytovia Therapeutics, Shoreline Biosciences, Applied StemCell, Cellistic, etc.

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

Market Segmentation

iPSC-Derived Natural Killer Cells market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Non-Engineered iPSC-Derived NK Cells

CAR-Engineered iPSC-Derived NK Cells

CD16-Enhanced iPSC-Derived NK Cells

Immune-Evasive iPSC-Derived NK Cells

Multi-Functional iPSC-Derived NK Cells

Market segment by Cell Source Strategy

Healthy Donor iPSC Line

GMP Master iPSC Bank

Gene-Edited Universal iPSC Line

HLA-Matched iPSC Bank

Patient-Specific iPSC Line

Market segment by Therapeutic Indication

Hematologic Malignancies

Solid Tumors

Autoimmune Diseases

Infectious Diseases

Inflammation and Tissue Repair

Other Research Uses

Market segment by Development and Delivery Format

Research-Use Cell Product

Preclinical Candidate

Clinical-Grade Drug Product

CDMO Manufacturing Service

Cell Bank and Starting Material

Market segment by Application

Cancer Immunotherapy

Autoimmune Disease Therapy

Infectious Disease Research

Drug Screening and Mechanism Studies

Cell Therapy Process Development

Other Applications

Major players covered

Fate Therapeutics

Century Therapeutics

Cartherics

Nuwacell Biotech

HebeCell

Healios

Cytovia Therapeutics

Shoreline Biosciences

Applied StemCell

Cellistic

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe iPSC-Derived Natural Killer Cells product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of iPSC-Derived Natural Killer Cells, with price, sales quantity, revenue, and global market share of iPSC-Derived Natural Killer Cells from 2021 to 2026.

Chapter 3, the iPSC-Derived Natural Killer Cells competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the iPSC-Derived Natural Killer Cells breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and iPSC-Derived Natural Killer Cells market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of iPSC-Derived Natural Killer Cells.

Chapter 14 and 15, to describe iPSC-Derived Natural Killer Cells sales channel, distributors, customers, research findings and conclusion.

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