

Global iPSC-Derived Natural Killer Cells Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global iPSC-Derived Natural Killer Cells market size is expected to reach \$ 1106 million by 2032, rising at a market growth of 30.3% CAGR during the forecast period (2026-2032).

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 studies the global iPSC-Derived Natural Killer Cells production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for iPSC-Derived Natural Killer Cells 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 Natural Killer Cells that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global iPSC-Derived Natural Killer Cells total production and demand, 2021-2032, (K Dose)

Global iPSC-Derived Natural Killer Cells total production value, 2021-2032, (USD Million)

Global iPSC-Derived Natural Killer Cells production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Dose), (based on production site)

Global iPSC-Derived Natural Killer Cells consumption by region & country, CAGR, 2021-2032 & (K Dose)

U.S. VS China: iPSC-Derived Natural Killer Cells domestic production, consumption, key domestic manufacturers and share

Global iPSC-Derived Natural Killer Cells production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Dose)

Global iPSC-Derived Natural Killer Cells production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Dose)

Global iPSC-Derived Natural Killer Cells production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Dose)

This report profiles key players in the global iPSC-Derived Natural Killer Cells 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World iPSC-Derived Natural Killer Cells market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Dose) and average price (US\$/Dose) 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 iPSC-Derived Natural Killer Cells Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global iPSC-Derived Natural Killer Cells Market, Segmentation 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

Global iPSC-Derived Natural Killer Cells Market, Segmentation 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

Global iPSC-Derived Natural Killer Cells Market, Segmentation by Therapeutic Indication:

Hematologic Malignancies

Solid Tumors

Autoimmune Diseases

Infectious Diseases

Inflammation and Tissue Repair

Other Research Uses

Global iPSC-Derived Natural Killer Cells Market, Segmentation by Development and Delivery Format:

Research-Use Cell Product

Preclinical Candidate

Clinical-Grade Drug Product

CDMO Manufacturing Service

Cell Bank and Starting Material

Global iPSC-Derived Natural Killer Cells Market, Segmentation by Application:

Cancer Immunotherapy

Autoimmune Disease Therapy

Infectious Disease Research

Drug Screening and Mechanism Studies

Cell Therapy Process Development

Other Applications

Companies Profiled:

Fate Therapeutics

Century Therapeutics

Cartherics

Nuwacell Biotech

HebeCell

Healios

Cytovia Therapeutics

Shoreline Biosciences

Applied StemCell

Cellistic

Key Questions Answered:

1. How big is the global iPSC-Derived Natural Killer Cells market?
2. What is the demand of the global iPSC-Derived Natural Killer Cells market?
3. What is the year over year growth of the global iPSC-Derived Natural Killer Cells market?
4. What is the production and production value of the global iPSC-Derived Natural Killer Cells market?
5. Who are the key producers in the global iPSC-Derived Natural Killer Cells market?
6. What are the growth factors driving the market demand?

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