

Cell Therapy Market Report by Cell Type (Stem Cell, Non-stem Cell), Therapy Type (Autologous, Allogeneic), Therapeutic Area (Malignancies, Musculoskeletal Disorders, Autoimmune Disorders, Dermatology, and Others), End User (Hospitals and Clinics, Academic and Research Institutes), and Region 2024-2032

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Abstracts

The global cell therapy market size reached US\$ 13.5 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 50.5 Billion by 2032, exhibiting a growth rate (CAGR) of 15.28% during 2024-2032. The increasing advances in stem cell research, the rising healthcare infrastructure across the globe, the growing patient awareness, the escalating government support, and the expanding insurance coverage are some of the factors propelling the market.

Cell therapy (CT) involves the transplantation of human cells to address tissue and cell damage, providing solutions for various medical conditions. This encompassing approach incorporates different cell types, including hematopoietic stem cells (HSC), skeletal muscle and mesenchymal stem cells, lymphocytes, dendritic cells, and pancreatic islet cells. Its applications extend beyond immune system enhancement for cancer treatment to encompass the management of autoimmune and infectious diseases, urinary issues, joint cartilage damage, spinal cord injuries, weakened immune systems, and neurological disorders. It plays a pivotal role in manufacturing regenerative medicines, enabling the development and implementation of novel treatments aimed at tissue and organ restoration and the recovery of functions impacted by aging, diseases, or injuries.

The global market is majorly driven by the rapid advancements in biotechnology. In line with this, the increasing research and development activities are significantly contributing to the market. Furthermore, the rising funding from governments and private investors fuels research and commercialization. Apart from this, the expanding clinical trial activities validate the efficacy and safety of cell therapies, catalyzing the market. Moreover, the growing incidence of chronic and degenerative diseases necessitates advanced treatment options, propelling the market. An aging demographic requires regenerative therapies for age-related conditions, bolstering the market. Besides, personalized cell therapies tailored to individual patients are gaining traction, fostering market growth. Regulatory bodies provide clearer pathways for cell therapy approvals, creating a positive outlook for the market. Competition drives innovation and diversification of cell therapy products. Additionally, the escalating prevalence of rare diseases is providing a boost to the market.

Cell Therapy Market Trends/Drivers:

Increasing prevalence of various diseases, such as cancer and cardiac abnormalities

The increasing prevalence of various diseases, particularly cancer and cardiac abnormalities, is favorably impacting the market. The global burden of these diseases has steadily risen due to factors like aging populations, lifestyle changes, and environmental influences. Cell therapy holds immense promise in treating and potentially curing these conditions by utilizing specialized cells' regenerative and reparative properties. For cancer, cell-based immunotherapies, such as CAR-T cell therapy, have shown remarkable success in targeting and eliminating cancer cells. In the case of cardiac abnormalities, stem cell-based therapies aim to repair damaged heart tissue and improve cardiac function. The urgent need for effective treatments for these widespread and life-threatening diseases propels extensive research, development, and investment in cell therapy approaches.

Rising number of clinical studies for cell-based therapies

The rising number of clinical studies for cell-based therapies is fueling the market growth. Clinical trials play a fundamental role in validating the safety and efficacy of these innovative treatments. As clinical studies grow, the demand for novel therapies to address various medical conditions such as cancer, autoimmune diseases, and degenerative disorders grows. Pharmaceutical companies, academic institutions, and biotechnology firms are actively conducting these trials to bring cell-based therapies to the market. The wealth of data generated from these studies demonstrates the therapeutic potential of cell therapies but also aids in refining treatment protocols and

identifying the most suitable patient populations. Moreover, regulatory agencies like the FDA in the United States actively support and expedite the approval process for cell-based therapies, further incentivizing the initiation of clinical trials. As a result, the increasing number of clinical studies catalyzes advancing cell therapies, fostering innovation and expanding their accessibility to needy patients. This factor underscores the significant role clinical research plays in propelling the market.

Expanding healthcare industry worldwide

The expanding healthcare industry worldwide is offering numerous opportunities for the market. As populations grow, age, and face an increasing burden of chronic diseases, the demand for advanced medical treatments rises significantly. The healthcare sector's expansion includes the development of cutting-edge therapies like cell-based treatments. Healthcare systems across the globe are recognizing the potential of cell therapy in addressing a wide range of medical conditions, from cancer and cardiovascular diseases to neurological disorders and autoimmune conditions. This recognition translates into increased investment, research, and clinical trials in regenerative medicine and cell therapy. Moreover, as healthcare infrastructure improves in emerging economies, there is greater accessibility to advanced medical treatments, including cell therapies. This global expansion of healthcare services broadens the potential patient pool for cell-based treatments, driving market growth.

Cell Therapy Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global cell therapy market report, along with forecasts at the global, regional and country levels for 2024-2032. Our report has categorized the market based on cell type, therapy type, therapeutic area, and end user.

Breakup by Cell Type:

- Stem Cell
 - Bone Marrow
 - Blood
 - Umbilical Cord-Derived
 - Adipose-Derived Stem Cell
 - Others
- Non-stem Cell

Stem cell dominates the market

The report has provided a detailed breakup and analysis of the market based on the cell type. This includes stem cell (bone marrow, blood, umbilical cord-derived, adipose-derived stem cell, and others) and non-stem cell. According to the report, stem cell represented the largest segment.

Stem cells, with their remarkable regenerative potential and ability to differentiate into various cell types, have garnered significant attention in the medical field. These versatile cells are instrumental in treating a wide spectrum of diseases, including degenerative disorders, neurological conditions, and hematological malignancies. The increasing prevalence of age-related diseases and chronic conditions has intensified the demand for effective stem cell-based treatments. Moreover, ongoing research and clinical trials continue to unveil new therapeutic possibilities for stem cells, further fueling market growth. Pharmaceutical and biotechnology firms heavily invest in stem cell research, focusing on developing innovative therapies.

Furthermore, regulatory agencies are recognizing the importance of stem cell therapies, streamlining approval processes, and safety standards. This facilitates the commercialization of stem cell-based treatments, making them more accessible to patients worldwide. The stem cell segment is a powerful driver of growth in the cell therapy market, promising revolutionary solutions for numerous medical challenges.

Breakup by Therapy Type:

Autologous

Allogeneic

Autologous dominates the market

The report has provided a detailed breakup and analysis of the market based on the therapy type. This includes autologous and allogeneic. According to the report, autologous represented the largest segment.

Autologous therapies involve the extraction, manipulation, and reinfusion of a patient's cells, minimizing the risk of rejection and adverse reactions. This personalized approach has gained prominence in treating various conditions, including cancer, autoimmune diseases, and degenerative disorders. The increasing demand for therapies with higher safety profiles and reduced immune complications has fueled the adoption of autologous cell therapies. These treatments harness the regenerative potential of a patient's cells, addressing unmet medical needs while minimizing the risks associated

with allogeneic treatments, where cells are sourced from donors.

Furthermore, advancements in cell processing techniques, such as CAR-T cell therapies for cancer treatment, showcase the remarkable potential of autologous therapies. Regulatory agencies are also streamlining approval pathways for these personalized treatments, expediting their availability to a wider patient population. As a result, the autologous therapy segment is a pivotal driver of growth in the cell therapy market, offering innovative and patient-centric solutions for various medical conditions.

Breakup by Therapeutic Area:

Malignancies

Musculoskeletal Disorders

Autoimmune Disorders

Dermatology

Others

Malignancies dominate the market

The report has provided a detailed breakup and analysis of the market based on the therapeutic area. This includes malignancies, musculoskeletal disorders, autoimmune disorders, dermatology, and others. According to the report, malignancies represented the largest segment.

Malignancies, including various types of cancer, present one of the most challenging healthcare concerns globally. Cell therapies, such as CAR-T, have emerged as groundbreaking treatments for these conditions. The growing incidence of cancer and the increasing demand for more effective and targeted therapies have propelled the development and adoption of cell-based treatments. These therapies harness the patient's immune system or engineered cells to target and eliminate cancer cells. Their remarkable success in clinical trials and real-world applications underscores their potential to transform cancer treatment.

Moreover, regulatory agencies are expediting approvals for cell therapies in oncology, streamlining their path to market. As a result, the malignancies-focused segment serves as a critical driver of growth in the cell therapy market, offering renewed hope to cancer patients and contributing to the evolution of cancer care.

Breakup by End User:

Hospitals and Clinics

Academic and Research Institutes

The report has provided a detailed breakup and analysis of the market based on the end user. This includes hospitals and clinics, academic and research institutes.

Hospitals and clinics, with their advanced medical infrastructure and access to a broad patient base, are well-positioned to integrate cell therapy into their treatment protocols. They offer a range of cell-based treatments, including CAR-T cell therapy for cancer and stem cell therapies for various conditions, providing patients with advanced and personalized care options.

Furthermore, the collaboration between hospitals, clinics, and cell therapy companies fosters the expansion of clinical trials and the development of new therapies. As these healthcare facilities continue to recognize the potential of cell therapies in improving patient outcomes, their adoption and utilization of cell-based treatments contribute significantly to the market's overall growth.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

North America exhibits a clear dominance, accounting for the largest market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounted for the largest market share.

North America boasts a robust and highly developed healthcare infrastructure, including advanced research institutions, hospitals, and clinical centers. These institutions actively engage in cell therapy research and clinical trials, accelerating the development and adoption of innovative cell-based treatments. The substantial investments in the biotechnology and pharmaceutical sectors facilitate the advancement of cell therapies. Pharmaceutical companies and biotech firms in the region actively contribute to cell therapy research and development, resulting in a steady stream of new therapies.

The regulatory agencies in North America, such as the FDA in the United States, play a crucial role in streamlining the approval process for cell therapies, ensuring they meet rigorous safety and efficacy standards. This regulatory support expedites the commercialization of these treatments. Moreover, the increasing prevalence of chronic diseases, including cancer, fuels the demand for effective and advanced therapies, making cell therapies an attractive option for patients and healthcare providers.

Competitive Landscape:

Top companies are strengthening the market through multifaceted strategies and contributions. These industry leaders prioritize extensive research and development, continuously pushing the boundaries of cell therapies by exploring novel cell types, delivery methods, and applications. They conduct rigorous clinical trials, substantiating the safety and efficacy of their therapies and obtaining regulatory approvals that enhance market credibility. Strategic collaborations and partnerships with research institutions, biotech firms, and healthcare organizations allow them to leverage combined expertise and resources. Top companies often expand their market reach

globally, making cell therapies accessible to a broader patient base. Maintaining strict compliance with regulatory standards ensures that their therapies meet stringent safety and quality requirements, instilling confidence among healthcare professionals and patients. Additionally, initiatives to improve patient access, educational campaigns, and strategic acquisitions collectively reinforce their pivotal role in advancing cell therapies and fostering market growth.

The report has provided a comprehensive analysis of the competitive landscape in the cell therapy market. Detailed profiles of all major companies have also been provided.

AlloSource

Anterogen Co. Ltd.

Cells for Cells

Holostem Terapie Avanzate S.r.l.

JCR Pharmaceuticals

Kolon TissueGene Inc

MEDIPOST

Mesoblast Limited

NuVasive

Stemmedica Cell Technologies Inc.

Stempeutics Research Pvt. Ltd

Vericel Corporation

Recent Developments:

In July 2023, AlloSource received FDA 510(K) clearance for AceConnex pre-sutured fascia for hip labral reconstruction and augmentation.

In June 2020, Holostem Terapie Avanzate S.r.l signed a contract for the transfer of the business branch of Holoclar, an autologous stem-cell therapy for the treatment of patients with severe ocular surface burns, with Chiesi Farmaceutici, international research-focussed group (Chiesi Group).

In October 2022, MEDIPOST announced the launch of a Contract Development and Manufacturing Organization (CDMO) business for cell and gene therapy products in Korea.

Key Questions Answered in This Report

1. What was the size of the global cell therapy market in 2023?
2. What is the expected growth rate of the global cell therapy market during 2024-2032?
3. What has been the impact of COVID-19 on the global cell therapy market?

4. What are the key factors driving the global cell therapy market?
5. What is the breakup of the global cell therapy market based on the cell type?
6. What is the breakup of the global cell therapy market based on the therapy type?
7. What is the breakup of the global cell therapy market based on the therapeutic area?
8. What are the key regions in the global cell therapy market?
9. Who are the key players/companies in the global cell therapy market?

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