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Global iPSC-Derived Natural Killer Cells Market Growth 2026-2032

https://marketpublishers.com/r/G57DAEB73C23EN.html
Date: October 2026
Pages: 100
Price: US$ 3,660.00 (Single User License)
ID: G57DAEB73C23EN

Abstracts

The global iPSC-Derived Natural Killer Cells market size is predicted to grow from US$ 161 million in 2025 to US$ 1147 million in 2032; it is expected to grow at a CAGR of 32.2% from 2026 to 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.

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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

LP Information, Inc. (LPI) ' newest research report, the “iPSC-Derived Natural Killer Cells Industry Forecast” looks at past sales and reviews total world iPSC-Derived Natural Killer Cells sales in 2025, providing a comprehensive analysis by region and market sector of projected iPSC-Derived Natural Killer Cells sales for 2026 through 2032. With iPSC-Derived Natural Killer Cells sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world iPSC-Derived Natural Killer Cells industry.

This Insight Report provides a comprehensive analysis of the global iPSC-Derived Natural Killer Cells landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on iPSC-Derived Natural Killer Cells portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global iPSC-Derived Natural Killer Cells market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for iPSC-Derived Natural Killer Cells and breaks down the

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forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global iPSC-Derived Natural Killer Cells.

This report presents a comprehensive overview, market shares, and growth opportunities of iPSC-Derived Natural Killer Cells market by product type, application, key manufacturers and key regions and countries.

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

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

Segmentation by Therapeutic Indication:

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Hematologic Malignancies

Solid Tumors

Autoimmune Diseases

Infectious Diseases

Inflammation and Tissue Repair

Other Research Uses

Segmentation by Development and Delivery Format:

Research-Use Cell Product

Preclinical Candidate

Clinical-Grade Drug Product

CDMO Manufacturing Service

Cell Bank and Starting Material

Segmentation by Application:

Cancer Immunotherapy

Autoimmune Disease Therapy

Infectious Disease Research

Drug Screening and Mechanism Studies

Cell Therapy Process Development

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Other Applications

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

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Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Fate Therapeutics

Century Therapeutics

Cartherics

Nuwacell Biotech

HebeCell

Healios

Cytovia Therapeutics

Shoreline Biosciences

Applied StemCell

Cellistic

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Key Questions Addressed in this Report

What is the 10-year outlook for the global iPSC-Derived Natural Killer Cells market?

What factors are driving iPSC-Derived Natural Killer Cells market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do iPSC-Derived Natural Killer Cells market opportunities vary by end market size?

How does iPSC-Derived Natural Killer Cells break out by Type, by Application?

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