

# Global Mesenchymal Stem Cell Therapy(MSCT) Market Growth (Status and Outlook) 2026-2032

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## Abstracts

The global Mesenchymal Stem Cell Therapy(MSCT) market size is predicted to grow from US\$ 1057 million in 2025 to US\$ 2667 million in 2032; it is expected to grow at a CAGR of 14.1% from 2026 to 2032.

Mesenchymal Stem Cell Therapy (MSCT) refers to therapeutic interventions based on mesenchymal stem/stromal cells (MSCs), leveraging their immunomodulatory, anti-inflammatory, paracrine, regenerative, and tissue-repair properties to treat diseases or improve clinical outcomes. MSCs used for therapeutic purposes can be derived from bone marrow, adipose tissue, umbilical cord, placenta, and other qualified tissue sources, and may be administered through intravenous infusion, local injection, intra-articular injection, or other clinically appropriate routes depending on the indication. From a commercial perspective, this study focuses on two principal forms of MSCT: Treatment Service and Medication. Treatment Service covers patient-oriented therapeutic procedures involving MSC collection or sourcing, preparation, expansion where applicable, quality control, clinical administration, and related medical services, while Medication refers to standardized MSC-based therapeutic products developed and manufactured under pharmaceutical or cell-therapy regulatory frameworks. The study covers both autologous and allogeneic treatment models and focuses on clinical applications including Cancer Therapy, Inflammatory Diseases, Fibrotic Diseases, and other therapeutic areas where MSC-based intervention is being developed or commercialized.

## Key Findings

Commercial MSCT is evolving from individualized treatment services toward standardized and scalable cell therapy products

Treatment Service and Medication represent the two principal commercial forms covered by the MSCT market

Allogeneic MSC therapies offer stronger potential for standardized manufacturing, inventory management, and broader commercial deployment

Inflammatory and immune-mediated diseases remain important targets for the clinical development of MSC therapies

Asia-Pacific has established an active MSCT commercialization and clinical development ecosystem

## **Market Trends**

The MSCT industry is moving toward greater standardization, scalable manufacturing, and evidence-based commercialization. Earlier MSC applications frequently relied on individualized cell preparation and treatment-service models, while the industry is increasingly developing standardized allogeneic products with controlled cell sources, defined potency and quality attributes, reproducible manufacturing processes, cryopreservation, and ready-to-use delivery. Advances in cell expansion, automated manufacturing, serum-free or chemically defined culture systems, cryopreservation, potency assays, and process analytics are improving batch consistency and manufacturing scalability. At the same time, clinical development is becoming more indication-specific, with developers increasingly emphasizing mechanism-of-action evidence, patient stratification, dosing optimization, and clinically meaningful endpoints rather than relying primarily on the broad regenerative properties historically associated with MSCs.

## **Market Dynamics**

### **Drivers**

Demand for therapies addressing inflammatory, immune-mediated, degenerative, and tissue-injury conditions continues to support MSCT development. MSCs possess immunomodulatory and paracrine characteristics that provide a differentiated therapeutic rationale for diseases in which conventional pharmaceuticals or surgical interventions may have limitations. Regulatory approvals of selected MSC-based products in several markets have also demonstrated that MSC therapies can progress

from experimental clinical research toward regulated commercial products. Meanwhile, improvements in GMP cell manufacturing, quality-control technologies, cryogenic logistics, and standardized clinical protocols are gradually strengthening the infrastructure required for broader commercialization.

## **Restraints**

The principal constraints are high manufacturing and treatment costs, complex regulatory requirements, heterogeneous clinical outcomes, and challenges in establishing consistent product quality. MSC characteristics may vary according to donor, tissue source, passage number, culture conditions, storage method, and manufacturing process, making comparability and batch consistency particularly important. Treatment-service models can additionally require individualized cell processing and specialized clinical infrastructure, while pharmaceutical products must satisfy stringent requirements relating to identity, purity, potency, sterility, stability, manufacturing consistency, and clinical efficacy. These factors increase development expenditure and can extend commercialization timelines.

## **Opportunities**

The transition from individualized cell processing toward standardized allogeneic products creates significant opportunities for industrialized MSCT. Off-the-shelf MSC products can potentially improve production efficiency, reduce treatment preparation time, facilitate centralized manufacturing, and expand geographic coverage. Opportunities are also emerging from improved cell engineering, optimized culture and expansion technologies, enhanced cryopreservation, biomaterial-assisted delivery, combination therapies, and more precise selection of indications and patient populations. Markets with expanding regenerative medicine frameworks and increasing clinical infrastructure may provide additional opportunities for both therapeutic products and specialized treatment services.

## **Challenges**

Long-term commercial success depends on demonstrating reproducible clinical benefit and establishing clear relationships among cell characteristics, potency, dose, administration route, and therapeutic outcomes. Differences among MSC sources and manufacturing platforms complicate direct product comparison and industry standardization. Developers must also address scale-up without compromising biological activity, long-term safety monitoring, reimbursement, physician adoption, and cost-effectiveness. Competition from other advanced therapies, including engineered

cell therapies, gene therapies, biologics, and next-generation regenerative technologies, may further raise the evidence threshold required for MSCT commercialization.

## Industry Chain Analysis

The upstream MSCT industry comprises qualified tissue and cell sources, cell collection materials, culture media, cytokines and growth supplements, serum-free reagents, cell-processing consumables, bioreactors, cryopreservation materials, analytical instruments, testing technologies, and cold-chain infrastructure. Quality of upstream materials directly influences cell identity, viability, expansion efficiency, biological activity, sterility, and manufacturing consistency. As MSC therapies move toward pharmaceutical-grade production, traceability of raw materials, closed processing, contamination control, standardized testing, and GMP-compliant supply systems are becoming increasingly important.

The midstream comprises MSC therapeutic product developers, cell manufacturing facilities, biotechnology companies, specialized treatment providers, and clinical institutions responsible for cell isolation, expansion, characterization, formulation, cryopreservation, release testing, clinical administration, and patient management. Downstream value is generated through therapeutic use across Cancer Therapy, Inflammatory Diseases, Fibrotic Diseases, and other indications. Value creation is increasingly shifting toward proprietary manufacturing processes, clinically validated indications, scalable production, potency and quality-control systems, regulatory capabilities, and treatment networks rather than simple cell expansion alone.

## Segment Insights

By commercial form, the MSCT market can be divided into Treatment Service and Medication. Treatment Service is characterized by closer integration between cell processing and clinical delivery and is particularly relevant to patient-specific or institution-based treatment models. Its commercial value depends not only on the cells themselves but also on collection, processing, testing, storage, administration, medical supervision, and supporting clinical services. This model can provide flexibility for individualized treatment but generally faces greater limitations in scalability, geographical expansion, and process standardization.

Medication represents the more standardized pharmaceutical model, in which MSCs are developed as regulated therapeutic products with defined cell sources, manufacturing specifications, dosage forms, release criteria, storage conditions, and

clinical indications. Allogeneic products are particularly suitable for centralized manufacturing and batch production and therefore have greater potential to evolve toward off-the-shelf cell medicines. As manufacturing platforms and regulatory standards mature, the relative importance of standardized Medication products is expected to increase within the commercial MSCT ecosystem.

## **Downstream Market Opportunities**

MSCT applications span Cancer Therapy, Inflammatory Diseases, Fibrotic Diseases, and other therapeutic areas. In Cancer Therapy, research increasingly focuses on exploiting MSC homing and immunomodulatory properties, including their potential role as carriers or components of combination strategies, although clinical translation requires careful management of biological and safety considerations. Inflammatory Diseases represent an important development area because MSC-mediated immune regulation may be relevant to excessive or dysregulated inflammatory responses. Fibrotic Diseases provide another potential opportunity, particularly where chronic inflammation and abnormal tissue remodeling contribute to progressive organ dysfunction. Other applications encompass a broad range of regenerative and immune-related indications, including musculoskeletal, neurological, cardiovascular, tissue-repair, and transplantation-associated disorders, providing multiple pathways for future clinical and commercial expansion.

## **Regional Insights**

Asia-Pacific represents one of the most active regions for MSCT clinical development and commercialization, supported by established cell-therapy ecosystems in China, Japan, South Korea, India, Australia, and Southeast Asia. The region contains both developers of standardized MSC therapeutic products and providers of cell-based treatment services, resulting in diverse commercialization models. Japan and South Korea have accumulated experience with regulated regenerative medicine and commercial cell products, while China has developed an expanding pipeline of MSC drug candidates and manufacturing capabilities. These differences create opportunities for both pharmaceutical development and specialized clinical services.

North America remains important for clinical research, biotechnology innovation, manufacturing technology, and regulatory development, particularly as MSC therapies move toward more rigorously validated pharmaceutical products. Europe has substantial capabilities in advanced therapy medicinal products but maintains stringent requirements for manufacturing quality and clinical evidence. Regional differences in

regulatory pathways, reimbursement systems, clinical practice, patient access, and acceptance of cell therapies mean that MSCT commercialization strategies are likely to remain geographically differentiated rather than converging rapidly on a single global model.

## Competitive Landscape Analysis

The competitive landscape of MSCT is characterized by the coexistence of commercial cell-therapy developers, clinical-stage biotechnology companies, specialized cell manufacturers, and treatment-service providers. Mesoblast, Pharmicell, MEDIPOST, JCR Pharmaceuticals, Anterogen, CORESTEMCHEMON, Nipro Corporation, Takeda Pharmaceutical, Stempeutics Research and other participants have pursued different MSC sources, indications, manufacturing models, and regulatory pathways, while Chinese companies including Tianjin AmCellGene Engineering, Beijing Beilai Biotechnology, Shanghai iCELL Biotechnology, Jiuzhitang Meike, Health & Biotech, Platinum Life Biotechnology, and Saliai Stem Cell Science and Technology are advancing domestic MSC development and clinical translation. Service-oriented participants such as Biotherapy International and Celltex Therapeutics represent a different commercial model centered more closely on cell processing and patient treatment. Competitive differentiation increasingly depends on clinical evidence, proprietary manufacturing processes, cell-source control, potency and quality systems, regulatory progress, production scalability, cryopreservation performance, treatment accessibility, and the ability to convert clinical-stage programs into repeatable commercial products rather than simply possessing MSC culture capabilities.

## Report Scope

LPI (LP Information)' newest research report, the "Mesenchymal Stem Cell Therapy(MSCT) Industry Forecast" looks at past sales and reviews total world Mesenchymal Stem Cell Therapy(MSCT) sales in 2025, providing a comprehensive analysis by region and market sector of projected Mesenchymal Stem Cell Therapy(MSCT) sales for 2026 through 2032. With Mesenchymal Stem Cell Therapy(MSCT) sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Mesenchymal Stem Cell Therapy(MSCT) industry.

This Insight Report provides a comprehensive analysis of the global Mesenchymal Stem Cell Therapy(MSCT) landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and

M&A activity. This report also analyses the strategies of leading global companies with a focus on Mesenchymal Stem Cell Therapy(MSCT) portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Mesenchymal Stem Cell Therapy(MSCT) market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Mesenchymal Stem Cell Therapy(MSCT) and breaks down the 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 Mesenchymal Stem Cell Therapy(MSCT).

This report presents a comprehensive overview, market shares, and growth opportunities of Mesenchymal Stem Cell Therapy(MSCT) market by product type, application, key players and key regions and countries.

## **Market Segmentation**

### **Segmentation by Type:**

Treatment Service

Medication

### **Segmentation by Donor Relations:**

Autologous MSCT

Allogeneic MSCT

### **Segmentation by Source of Tissue:**

Bone Marrow-derived MSC

Adipose-derived MSC

Umbilical Cord-derived MSC

Placenta-derived MSC

Others

### **Segmentation by Route of Administration:**

Intravenous Administration

Local Injection

Intra-articular Injection

Others

### **Segmentation by Application:**

Cancer Therapy

Inflammatory Diseases

Fibrotic Diseases

Others

### **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

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 analyzing the company's coverage, product portfolio, its market penetration.

Biotherapy International

Mesoblast

Tianjin Angsai Cell Genetic Engineering Co. Ltd

Beijing Beilai Biotechnology Co. Ltd

Shanghai Aisar Biotechnology Co. Ltd

Jiuzhitang Meike (Beijing) Cell Technology Co. Ltd

Beijing Han's United Biotechnology Co. Ltd

Bosheng Excellence Biotechnology (Beijing) Co. Ltd

Cellular Biomedicine Group

Guangzhou Celera Stem Cell Technology Co. Ltd.

CryoCord Sdn Bhd

Cytopenics Sdn Bhd

Stempeutics Research Pvt Ltd

Pharmicell

MEDIPOST

JCR Pharmaceuticals

Anterogen

CORESTEMCHEMON

Nipro Corporation

Takeda Pharmaceutical

Hope Biosciences

Stemedica Cell Technologies

Celltex Therapeutics

## Contents

### 1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

### 2 EXECUTIVE SUMMARY

#### 2.1 World Market Overview

- 2.1.1 Global Mesenchymal Stem Cell Therapy(MSCT) Market Size (2021-2032)
- 2.1.2 Mesenchymal Stem Cell Therapy(MSCT) Market Size CAGR by Region (2021 VS 2025 VS 2032)
- 2.1.3 World Current & Future Analysis for Mesenchymal Stem Cell Therapy(MSCT) by Country/Region (2021, 2025 & 2032)

#### 2.2 Mesenchymal Stem Cell Therapy(MSCT) Segment by Type

- 2.2.1 Treatment Service
- 2.2.2 Medication
- 2.2.3 Mesenchymal Stem Cell Therapy(MSCT) Market Size by Type
  - 2.2.3.1 Mesenchymal Stem Cell Therapy(MSCT) Market Size CAGR by Type (2021 VS 2025 VS 2032)
  - 2.2.3.2 Global Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Type (2021-2026)

#### 2.3 Mesenchymal Stem Cell Therapy(MSCT) Segment by Donor Relations

- 2.3.1 Autologous MSCT
- 2.3.2 Allogeneic MSCT
- 2.3.3 Mesenchymal Stem Cell Therapy(MSCT) Market Size by Donor Relations
  - 2.3.3.1 Mesenchymal Stem Cell Therapy(MSCT) Market Size CAGR by Donor Relations (2021 VS 2025 VS 2032)
  - 2.3.3.2 Global Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Donor Relations (2021-2026)

#### 2.4 Mesenchymal Stem Cell Therapy(MSCT) Segment by Source of Tissue

- 2.4.1 Bone Marrow-derived MSC

- 2.4.2 Adipose-derived MSC
- 2.4.3 Umbilical Cord-derived MSC
- 2.4.4 Placenta-derived MSC
- 2.4.5 Others
- 2.4.6 Mesenchymal Stem Cell Therapy(MSCT) Market Size by Source of Tissue
  - 2.4.6.1 Mesenchymal Stem Cell Therapy(MSCT) Market Size CAGR by Source of Tissue (2021 VS 2025 VS 2032)
  - 2.4.6.2 Global Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Source of Tissue (2021-2026)
- 2.5 Mesenchymal Stem Cell Therapy(MSCT) Segment by Route of Administration
  - 2.5.1 Intravenous Administration
  - 2.5.2 Local Injection
  - 2.5.3 Intra-articular Injection
  - 2.5.4 Others
  - 2.5.5 Mesenchymal Stem Cell Therapy(MSCT) Market Size by Route of Administration
    - 2.5.5.1 Mesenchymal Stem Cell Therapy(MSCT) Market Size CAGR by Route of Administration (2021 VS 2025 VS 2032)
    - 2.5.5.2 Global Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Route of Administration (2021-2026)
- 2.6 Mesenchymal Stem Cell Therapy(MSCT) Segment by Application
  - 2.6.1 Cancer Therapy
  - 2.6.2 Inflammatory Diseases
  - 2.6.3 Fibrotic Diseases
  - 2.6.4 Others
  - 2.6.5 Mesenchymal Stem Cell Therapy(MSCT) Market Size by Application
    - 2.6.5.1 Mesenchymal Stem Cell Therapy(MSCT) Market Size CAGR by Application (2021 VS 2025 VS 2032)
    - 2.6.5.2 Global Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Application (2021-2026)

### **3 MESENCHYMAL STEM CELL THERAPY(MSCT) MARKET SIZE BY PLAYER**

- 3.1 Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Player
  - 3.1.1 Global Mesenchymal Stem Cell Therapy(MSCT) Revenue by Player (2021-2026)
  - 3.1.2 Global Mesenchymal Stem Cell Therapy(MSCT) Revenue Market Share by Player (2021-2026)
- 3.2 Global Mesenchymal Stem Cell Therapy(MSCT) Key Players Head office and Products Offered
- 3.3 Market Concentration Rate Analysis

- 3.3.1 Competition Landscape Analysis
- 3.3.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- 3.4 New Products and Potential Entrants
- 3.5 Mergers & Acquisitions, Expansion

## **4 MESENCHYMAL STEM CELL THERAPY(MSCT) BY REGION**

- 4.1 Mesenchymal Stem Cell Therapy(MSCT) Market Size by Region (2021-2026)
- 4.2 Global Mesenchymal Stem Cell Therapy(MSCT) Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas Mesenchymal Stem Cell Therapy(MSCT) Market Size Growth (2021-2026)
- 4.4 APAC Mesenchymal Stem Cell Therapy(MSCT) Market Size Growth (2021-2026)
- 4.5 Europe Mesenchymal Stem Cell Therapy(MSCT) Market Size Growth (2021-2026)
- 4.6 Middle East & Africa Mesenchymal Stem Cell Therapy(MSCT) Market Size Growth (2021-2026)

## **5 AMERICAS**

- 5.1 Americas Mesenchymal Stem Cell Therapy(MSCT) Market Size by Country (2021-2026)
- 5.2 Americas Mesenchymal Stem Cell Therapy(MSCT) Market Size by Type (2021-2026)
- 5.3 Americas Mesenchymal Stem Cell Therapy(MSCT) Market Size by Application (2021-2026)
- 5.4 United States
- 5.5 Canada
- 5.6 Mexico
- 5.7 Brazil

## **6 APAC**

- 6.1 APAC Mesenchymal Stem Cell Therapy(MSCT) Market Size by Region (2021-2026)
- 6.2 APAC Mesenchymal Stem Cell Therapy(MSCT) Market Size by Type (2021-2026)
- 6.3 APAC Mesenchymal Stem Cell Therapy(MSCT) Market Size by Application (2021-2026)
- 6.4 China
- 6.5 Japan
- 6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

## **7 EUROPE**

7.1 Europe Mesenchymal Stem Cell Therapy(MSCT) Market Size by Country  
(2021-2026)

7.2 Europe Mesenchymal Stem Cell Therapy(MSCT) Market Size by Type (2021-2026)

7.3 Europe Mesenchymal Stem Cell Therapy(MSCT) Market Size by Application  
(2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

## **8 MIDDLE EAST & AFRICA**

8.1 Middle East & Africa Mesenchymal Stem Cell Therapy(MSCT) by Region  
(2021-2026)

8.2 Middle East & Africa Mesenchymal Stem Cell Therapy(MSCT) Market Size by Type  
(2021-2026)

8.3 Middle East & Africa Mesenchymal Stem Cell Therapy(MSCT) Market Size by  
Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

## **9 MARKET DRIVERS, CHALLENGES AND TRENDS**

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

## **10 GLOBAL MESENCHYMAL STEM CELL THERAPY(MSCT) MARKET FORECAST**

- 10.1 Global Mesenchymal Stem Cell Therapy(MSCT) Forecast by Region (2027-2032)
  - 10.1.1 Global Mesenchymal Stem Cell Therapy(MSCT) Forecast by Region (2027-2032)
  - 10.1.2 Americas Mesenchymal Stem Cell Therapy(MSCT) Forecast
  - 10.1.3 APAC Mesenchymal Stem Cell Therapy(MSCT) Forecast
  - 10.1.4 Europe Mesenchymal Stem Cell Therapy(MSCT) Forecast
  - 10.1.5 Middle East & Africa Mesenchymal Stem Cell Therapy(MSCT) Forecast
- 10.2 Americas Mesenchymal Stem Cell Therapy(MSCT) Forecast by Country (2027-2032)
  - 10.2.1 United States Market Mesenchymal Stem Cell Therapy(MSCT) Forecast
  - 10.2.2 Canada Market Mesenchymal Stem Cell Therapy(MSCT) Forecast
  - 10.2.3 Mexico Market Mesenchymal Stem Cell Therapy(MSCT) Forecast
  - 10.2.4 Brazil Market Mesenchymal Stem Cell Therapy(MSCT) Forecast
- 10.3 APAC Mesenchymal Stem Cell Therapy(MSCT) Forecast by Region (2027-2032)
  - 10.3.1 China Mesenchymal Stem Cell Therapy(MSCT) Market Forecast
  - 10.3.2 Japan Market Mesenchymal Stem Cell Therapy(MSCT) Forecast
  - 10.3.3 Korea Market Mesenchymal Stem Cell Therapy(MSCT) Forecast
  - 10.3.4 Southeast Asia Market Mesenchymal Stem Cell Therapy(MSCT) Forecast
  - 10.3.5 India Market Mesenchymal Stem Cell Therapy(MSCT) Forecast
  - 10.3.6 Australia Market Mesenchymal Stem Cell Therapy(MSCT) Forecast
- 10.4 Europe Mesenchymal Stem Cell Therapy(MSCT) Forecast by Country (2027-2032)
  - 10.4.1 Germany Market Mesenchymal Stem Cell Therapy(MSCT) Forecast
  - 10.4.2 France Market Mesenchymal Stem Cell Therapy(MSCT) Forecast
  - 10.4.3 UK Market Mesenchymal Stem Cell Therapy(MSCT) Forecast
  - 10.4.4 Italy Market Mesenchymal Stem Cell Therapy(MSCT) Forecast
  - 10.4.5 Russia Market Mesenchymal Stem Cell Therapy(MSCT) Forecast
- 10.5 Middle East & Africa Mesenchymal Stem Cell Therapy(MSCT) Forecast by Region (2027-2032)
  - 10.5.1 Egypt Market Mesenchymal Stem Cell Therapy(MSCT) Forecast
  - 10.5.2 South Africa Market Mesenchymal Stem Cell Therapy(MSCT) Forecast
  - 10.5.3 Israel Market Mesenchymal Stem Cell Therapy(MSCT) Forecast
  - 10.5.4 Turkey Market Mesenchymal Stem Cell Therapy(MSCT) Forecast
- 10.6 Global Mesenchymal Stem Cell Therapy(MSCT) Forecast by Type (2027-2032)
- 10.7 Global Mesenchymal Stem Cell Therapy(MSCT) Forecast by Application (2027-2032)
  - 10.7.1 GCC Countries Market Mesenchymal Stem Cell Therapy(MSCT) Forecast

## **11 KEY PLAYERS ANALYSIS**

## 11.1 Biotherapy International

### 11.1.1 Biotherapy International Company Information

### 11.1.2 Biotherapy International Mesenchymal Stem Cell Therapy(MSCT) Product Offered

### 11.1.3 Biotherapy International Mesenchymal Stem Cell Therapy(MSCT) Revenue, Gross Margin and Market Share (2021-2026)

### 11.1.4 Biotherapy International Main Business Overview

### 11.1.5 Biotherapy International Latest Developments

## 11.2 Mesoblast

### 11.2.1 Mesoblast Company Information

### 11.2.2 Mesoblast Mesenchymal Stem Cell Therapy(MSCT) Product Offered

### 11.2.3 Mesoblast Mesenchymal Stem Cell Therapy(MSCT) Revenue, Gross Margin and Market Share (2021-2026)

### 11.2.4 Mesoblast Main Business Overview

### 11.2.5 Mesoblast Latest Developments

## 11.3 Tianjin Angsai Cell Genetic Engineering Co. Ltd

### 11.3.1 Tianjin Angsai Cell Genetic Engineering Co. Ltd Company Information

### 11.3.2 Tianjin Angsai Cell Genetic Engineering Co. Ltd Mesenchymal Stem Cell Therapy(MSCT) Product Offered

### 11.3.3 Tianjin Angsai Cell Genetic Engineering Co. Ltd Mesenchymal Stem Cell Therapy(MSCT) Revenue, Gross Margin and Market Share (2021-2026)

### 11.3.4 Tianjin Angsai Cell Genetic Engineering Co. Ltd Main Business Overview

### 11.3.5 Tianjin Angsai Cell Genetic Engineering Co. Ltd Latest Developments

## 11.4 Beijing Beilai Biotechnology Co. Ltd

### 11.4.1 Beijing Beilai Biotechnology Co. Ltd Company Information

### 11.4.2 Beijing Beilai Biotechnology Co. Ltd Mesenchymal Stem Cell Therapy(MSCT) Product Offered

### 11.4.3 Beijing Beilai Biotechnology Co. Ltd Mesenchymal Stem Cell Therapy(MSCT) Revenue, Gross Margin and Market Share (2021-2026)

### 11.4.4 Beijing Beilai Biotechnology Co. Ltd Main Business Overview

### 11.4.5 Beijing Beilai Biotechnology Co. Ltd Latest Developments

## 11.5 Shanghai Aisar Biotechnology Co. Ltd

### 11.5.1 Shanghai Aisar Biotechnology Co. Ltd Company Information

### 11.5.2 Shanghai Aisar Biotechnology Co. Ltd Mesenchymal Stem Cell Therapy(MSCT) Product Offered

### 11.5.3 Shanghai Aisar Biotechnology Co. Ltd Mesenchymal Stem Cell Therapy(MSCT) Revenue, Gross Margin and Market Share (2021-2026)

### 11.5.4 Shanghai Aisar Biotechnology Co. Ltd Main Business Overview

### 11.5.5 Shanghai Aisar Biotechnology Co. Ltd Latest Developments

## 11.6 Jiuzhitang Meike (Beijing) Cell Technology Co. Ltd

11.6.1 Jiuzhitang Meike (Beijing) Cell Technology Co. Ltd Company Information

11.6.2 Jiuzhitang Meike (Beijing) Cell Technology Co. Ltd Mesenchymal Stem Cell Therapy(MSCT) Product Offered

11.6.3 Jiuzhitang Meike (Beijing) Cell Technology Co. Ltd Mesenchymal Stem Cell Therapy(MSCT) Revenue, Gross Margin and Market Share (2021-2026)

11.6.4 Jiuzhitang Meike (Beijing) Cell Technology Co. Ltd Main Business Overview

11.6.5 Jiuzhitang Meike (Beijing) Cell Technology Co. Ltd Latest Developments

## 11.7 Beijing Han's United Biotechnology Co. Ltd

11.7.1 Beijing Han's United Biotechnology Co. Ltd Company Information

11.7.2 Beijing Han's United Biotechnology Co. Ltd Mesenchymal Stem Cell Therapy(MSCT) Product Offered

11.7.3 Beijing Han's United Biotechnology Co. Ltd Mesenchymal Stem Cell Therapy(MSCT) Revenue, Gross Margin and Market Share (2021-2026)

11.7.4 Beijing Han's United Biotechnology Co. Ltd Main Business Overview

11.7.5 Beijing Han's United Biotechnology Co. Ltd Latest Developments

## 11.8 Bosheng Excellence Biotechnology (Beijing) Co. Ltd

11.8.1 Bosheng Excellence Biotechnology (Beijing) Co. Ltd Company Information

11.8.2 Bosheng Excellence Biotechnology (Beijing) Co. Ltd Mesenchymal Stem Cell Therapy(MSCT) Product Offered

11.8.3 Bosheng Excellence Biotechnology (Beijing) Co. Ltd Mesenchymal Stem Cell Therapy(MSCT) Revenue, Gross Margin and Market Share (2021-2026)

11.8.4 Bosheng Excellence Biotechnology (Beijing) Co. Ltd Main Business Overview

11.8.5 Bosheng Excellence Biotechnology (Beijing) Co. Ltd Latest Developments

## 11.9 Cellular Biomedicine Group

11.9.1 Cellular Biomedicine Group Company Information

11.9.2 Cellular Biomedicine Group Mesenchymal Stem Cell Therapy(MSCT) Product Offered

11.9.3 Cellular Biomedicine Group Mesenchymal Stem Cell Therapy(MSCT) Revenue, Gross Margin and Market Share (2021-2026)

11.9.4 Cellular Biomedicine Group Main Business Overview

11.9.5 Cellular Biomedicine Group Latest Developments

## 11.10 Guangzhou Celera Stem Cell Technology Co. Ltd.

11.10.1 Guangzhou Celera Stem Cell Technology Co. Ltd. Company Information

11.10.2 Guangzhou Celera Stem Cell Technology Co. Ltd. Mesenchymal Stem Cell Therapy(MSCT) Product Offered

11.10.3 Guangzhou Celera Stem Cell Technology Co. Ltd. Mesenchymal Stem Cell Therapy(MSCT) Revenue, Gross Margin and Market Share (2021-2026)

11.10.4 Guangzhou Celera Stem Cell Technology Co. Ltd. Main Business Overview

- 11.10.5 Guangzhou Celera Stem Cell Technology Co. Ltd. Latest Developments
- 11.11 CryoCord Sdn Bhd
  - 11.11.1 CryoCord Sdn Bhd Company Information
  - 11.11.2 CryoCord Sdn Bhd Mesenchymal Stem Cell Therapy(MSCT) Product Offered
  - 11.11.3 CryoCord Sdn Bhd Mesenchymal Stem Cell Therapy(MSCT) Revenue, Gross Margin and Market Share (2021-2026)
  - 11.11.4 CryoCord Sdn Bhd Main Business Overview
  - 11.11.5 CryoCord Sdn Bhd Latest Developments
- 11.12 Cytopeutics Sdn Bhd
  - 11.12.1 Cytopeutics Sdn Bhd Company Information
  - 11.12.2 Cytopeutics Sdn Bhd Mesenchymal Stem Cell Therapy(MSCT) Product Offered
  - 11.12.3 Cytopeutics Sdn Bhd Mesenchymal Stem Cell Therapy(MSCT) Revenue, Gross Margin and Market Share (2021-2026)
  - 11.12.4 Cytopeutics Sdn Bhd Main Business Overview
  - 11.12.5 Cytopeutics Sdn Bhd Latest Developments
- 11.13 Stempeutics Research Pvt Ltd
  - 11.13.1 Stempeutics Research Pvt Ltd Company Information
  - 11.13.2 Stempeutics Research Pvt Ltd Mesenchymal Stem Cell Therapy(MSCT) Product Offered
  - 11.13.3 Stempeutics Research Pvt Ltd Mesenchymal Stem Cell Therapy(MSCT) Revenue, Gross Margin and Market Share (2021-2026)
  - 11.13.4 Stempeutics Research Pvt Ltd Main Business Overview
  - 11.13.5 Stempeutics Research Pvt Ltd Latest Developments
- 11.14 Pharmicell
  - 11.14.1 Pharmicell Company Information
  - 11.14.2 Pharmicell Mesenchymal Stem Cell Therapy(MSCT) Product Offered
  - 11.14.3 Pharmicell Mesenchymal Stem Cell Therapy(MSCT) Revenue, Gross Margin and Market Share (2021-2026)
  - 11.14.4 Pharmicell Main Business Overview
  - 11.14.5 Pharmicell Latest Developments
- 11.15 MEDIPOST
  - 11.15.1 MEDIPOST Company Information
  - 11.15.2 MEDIPOST Mesenchymal Stem Cell Therapy(MSCT) Product Offered
  - 11.15.3 MEDIPOST Mesenchymal Stem Cell Therapy(MSCT) Revenue, Gross Margin and Market Share (2021-2026)
  - 11.15.4 MEDIPOST Main Business Overview
  - 11.15.5 MEDIPOST Latest Developments
- 11.16 JCR Pharmaceuticals

- 11.16.1 JCR Pharmaceuticals Company Information
- 11.16.2 JCR Pharmaceuticals Mesenchymal Stem Cell Therapy(MSCT) Product Offered
- 11.16.3 JCR Pharmaceuticals Mesenchymal Stem Cell Therapy(MSCT) Revenue, Gross Margin and Market Share (2021-2026)
- 11.16.4 JCR Pharmaceuticals Main Business Overview
- 11.16.5 JCR Pharmaceuticals Latest Developments
- 11.17 Anterogen
  - 11.17.1 Anterogen Company Information
  - 11.17.2 Anterogen Mesenchymal Stem Cell Therapy(MSCT) Product Offered
  - 11.17.3 Anterogen Mesenchymal Stem Cell Therapy(MSCT) Revenue, Gross Margin and Market Share (2021-2026)
  - 11.17.4 Anterogen Main Business Overview
  - 11.17.5 Anterogen Latest Developments
- 11.18 CORESTEMCHEMON
  - 11.18.1 CORESTEMCHEMON Company Information
  - 11.18.2 CORESTEMCHEMON Mesenchymal Stem Cell Therapy(MSCT) Product Offered
  - 11.18.3 CORESTEMCHEMON Mesenchymal Stem Cell Therapy(MSCT) Revenue, Gross Margin and Market Share (2021-2026)
  - 11.18.4 CORESTEMCHEMON Main Business Overview
  - 11.18.5 CORESTEMCHEMON Latest Developments
- 11.19 Nipro Corporation
  - 11.19.1 Nipro Corporation Company Information
  - 11.19.2 Nipro Corporation Mesenchymal Stem Cell Therapy(MSCT) Product Offered
  - 11.19.3 Nipro Corporation Mesenchymal Stem Cell Therapy(MSCT) Revenue, Gross Margin and Market Share (2021-2026)
  - 11.19.4 Nipro Corporation Main Business Overview
  - 11.19.5 Nipro Corporation Latest Developments
- 11.20 Takeda Pharmaceutical
  - 11.20.1 Takeda Pharmaceutical Company Information
  - 11.20.2 Takeda Pharmaceutical Mesenchymal Stem Cell Therapy(MSCT) Product Offered
  - 11.20.3 Takeda Pharmaceutical Mesenchymal Stem Cell Therapy(MSCT) Revenue, Gross Margin and Market Share (2021-2026)
  - 11.20.4 Takeda Pharmaceutical Main Business Overview
  - 11.20.5 Takeda Pharmaceutical Latest Developments
- 11.21 Hope Biosciences
  - 11.21.1 Hope Biosciences Company Information

- 11.21.2 Hope Biosciences Mesenchymal Stem Cell Therapy(MSCT) Product Offered
- 11.21.3 Hope Biosciences Mesenchymal Stem Cell Therapy(MSCT) Revenue, Gross Margin and Market Share (2021-2026)
- 11.21.4 Hope Biosciences Main Business Overview
- 11.21.5 Hope Biosciences Latest Developments
- 11.22 Stemedica Cell Technologies
  - 11.22.1 Stemedica Cell Technologies Company Information
  - 11.22.2 Stemedica Cell Technologies Mesenchymal Stem Cell Therapy(MSCT) Product Offered
  - 11.22.3 Stemedica Cell Technologies Mesenchymal Stem Cell Therapy(MSCT) Revenue, Gross Margin and Market Share (2021-2026)
  - 11.22.4 Stemedica Cell Technologies Main Business Overview
  - 11.22.5 Stemedica Cell Technologies Latest Developments
- 11.23 Celltex Therapeutics
  - 11.23.1 Celltex Therapeutics Company Information
  - 11.23.2 Celltex Therapeutics Mesenchymal Stem Cell Therapy(MSCT) Product Offered
  - 11.23.3 Celltex Therapeutics Mesenchymal Stem Cell Therapy(MSCT) Revenue, Gross Margin and Market Share (2021-2026)
  - 11.23.4 Celltex Therapeutics Main Business Overview
  - 11.23.5 Celltex Therapeutics Latest Developments

## **12 RESEARCH FINDINGS AND CONCLUSION**

## List Of Tables

### LIST OF TABLES

Table 1. Mesenchymal Stem Cell Therapy(MSCT) Market Size CAGR by Region (2021 VS 2025 VS 2032) & (\$ millions)

Table 2. Mesenchymal Stem Cell Therapy(MSCT) Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Treatment Service

Table 4. Major Players of Medication

Table 5. Mesenchymal Stem Cell Therapy(MSCT) Market Size CAGR by Type (2021 VS 2025 VS 2032) & (\$ millions)

Table 6. Global Mesenchymal Stem Cell Therapy(MSCT) Market Size by Type (2021-2026) & (\$ millions)

Table 7. Global Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Type (2021-2026)

Table 8. Major Players of Autologous MSCT

Table 9. Major Players of Allogeneic MSCT

Table 10. Mesenchymal Stem Cell Therapy(MSCT) Market Size CAGR by Donor Relations (2021 VS 2025 VS 2032) & (\$ millions)

Table 11. Global Mesenchymal Stem Cell Therapy(MSCT) Market Size by Donor Relations (2021-2026) & (\$ millions)

Table 12. Global Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Donor Relations (2021-2026)

Table 13. Major Players of Bone Marrow-derived MSC

Table 14. Major Players of Adipose-derived MSC

Table 15. Major Players of Umbilical Cord-derived MSC

Table 16. Major Players of Placenta-derived MSC

Table 17. Major Players of Others

Table 18. Mesenchymal Stem Cell Therapy(MSCT) Market Size CAGR by Source of Tissue (2021 VS 2025 VS 2032) & (\$ millions)

Table 19. Global Mesenchymal Stem Cell Therapy(MSCT) Market Size by Source of Tissue (2021-2026) & (\$ millions)

Table 20. Global Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Source of Tissue (2021-2026)

Table 21. Major Players of Intravenous Administration

Table 22. Major Players of Local Injection

Table 23. Major Players of Intra-articular Injection

Table 24. Major Players of Others

Table 25. Mesenchymal Stem Cell Therapy(MSCT) Market Size CAGR by Route of Administration (2021 VS 2025 VS 2032) & (\$ millions)

Table 26. Global Mesenchymal Stem Cell Therapy(MSCT) Market Size by Route of Administration (2021-2026) & (\$ millions)

Table 27. Global Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Route of Administration (2021-2026)

Table 28. Mesenchymal Stem Cell Therapy(MSCT) Market Size CAGR by Application (2021 VS 2025 VS 2032) & (\$ millions)

Table 29. Global Mesenchymal Stem Cell Therapy(MSCT) Market Size by Application (2021-2026) & (\$ millions)

Table 30. Global Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Application (2021-2026)

Table 31. Global Mesenchymal Stem Cell Therapy(MSCT) Revenue by Player (2021-2026) & (\$ millions)

Table 32. Global Mesenchymal Stem Cell Therapy(MSCT) Revenue Market Share by Player (2021-2026)

Table 33. Mesenchymal Stem Cell Therapy(MSCT) Key Players Head office and Products Offered

Table 34. Mesenchymal Stem Cell Therapy(MSCT) Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 35. New Products and Potential Entrants

Table 36. Mergers & Acquisitions, Expansion

Table 37. Global Mesenchymal Stem Cell Therapy(MSCT) Market Size by Region (2021-2026) & (\$ millions)

Table 38. Global Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Region (2021-2026)

Table 39. Global Mesenchymal Stem Cell Therapy(MSCT) Revenue by Country/Region (2021-2026) & (\$ millions)

Table 40. Global Mesenchymal Stem Cell Therapy(MSCT) Revenue Market Share by Country/Region (2021-2026)

Table 41. Americas Mesenchymal Stem Cell Therapy(MSCT) Market Size by Country (2021-2026) & (\$ millions)

Table 42. Americas Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Country (2021-2026)

Table 43. Americas Mesenchymal Stem Cell Therapy(MSCT) Market Size by Type (2021-2026) & (\$ millions)

Table 44. Americas Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Type (2021-2026)

Table 45. Americas Mesenchymal Stem Cell Therapy(MSCT) Market Size by

Application (2021-2026) & (\$ millions)

Table 46. Americas Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Application (2021-2026)

Table 47. APAC Mesenchymal Stem Cell Therapy(MSCT) Market Size by Region (2021-2026) & (\$ millions)

Table 48. APAC Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Region (2021-2026)

Table 49. APAC Mesenchymal Stem Cell Therapy(MSCT) Market Size by Type (2021-2026) & (\$ millions)

Table 50. APAC Mesenchymal Stem Cell Therapy(MSCT) Market Size by Application (2021-2026) & (\$ millions)

Table 51. Europe Mesenchymal Stem Cell Therapy(MSCT) Market Size by Country (2021-2026) & (\$ millions)

Table 52. Europe Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Country (2021-2026)

Table 53. Europe Mesenchymal Stem Cell Therapy(MSCT) Market Size by Type (2021-2026) & (\$ millions)

Table 54. Europe Mesenchymal Stem Cell Therapy(MSCT) Market Size by Application (2021-2026) & (\$ millions)

Table 55. Middle East & Africa Mesenchymal Stem Cell Therapy(MSCT) Market Size by Region (2021-2026) & (\$ millions)

Table 56. Middle East & Africa Mesenchymal Stem Cell Therapy(MSCT) Market Size by Type (2021-2026) & (\$ millions)

Table 57. Middle East & Africa Mesenchymal Stem Cell Therapy(MSCT) Market Size by Application (2021-2026) & (\$ millions)

Table 58. Key Market Drivers & Growth Opportunities of Mesenchymal Stem Cell Therapy(MSCT)

Table 59. Key Market Challenges & Risks of Mesenchymal Stem Cell Therapy(MSCT)

Table 60. Key Industry Trends of Mesenchymal Stem Cell Therapy(MSCT)

Table 61. Global Mesenchymal Stem Cell Therapy(MSCT) Market Size Forecast by Region (2027-2032) & (\$ millions)

Table 62. Global Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share Forecast by Region (2027-2032)

Table 63. Global Mesenchymal Stem Cell Therapy(MSCT) Market Size Forecast by Type (2027-2032) & (\$ millions)

Table 64. Global Mesenchymal Stem Cell Therapy(MSCT) Market Size Forecast by Application (2027-2032) & (\$ millions)

Table 65. Biotherapy International Details, Company Type, Mesenchymal Stem Cell Therapy(MSCT) Area Served and Its Competitors

Table 66. Biotherapy International Mesenchymal Stem Cell Therapy(MSCT) Product Offered

Table 67. Biotherapy International Mesenchymal Stem Cell Therapy(MSCT) Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 68. Biotherapy International Main Business

Table 69. Biotherapy International Latest Developments

Table 70. Mesoblast Details, Company Type, Mesenchymal Stem Cell Therapy(MSCT) Area Served and Its Competitors

Table 71. Mesoblast Mesenchymal Stem Cell Therapy(MSCT) Product Offered

Table 72. Mesoblast Mesenchymal Stem Cell Therapy(MSCT) Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 73. Mesoblast Main Business

Table 74. Mesoblast Latest Developments

Table 75. Tianjin Angsai Cell Genetic Engineering Co. Ltd Details, Company Type, Mesenchymal Stem Cell Therapy(MSCT) Area Served and Its Competitors

Table 76. Tianjin Angsai Cell Genetic Engineering Co. Ltd Mesenchymal Stem Cell Therapy(MSCT) Product Offered

Table 77. Tianjin Angsai Cell Genetic Engineering Co. Ltd Mesenchymal Stem Cell Therapy(MSCT) Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 78. Tianjin Angsai Cell Genetic Engineering Co. Ltd Main Business

Table 79. Tianjin Angsai Cell Genetic Engineering Co. Ltd Latest Developments

Table 80. Beijing Beilai Biotechnology Co. Ltd Details, Company Type, Mesenchymal Stem Cell Therapy(MSCT) Area Served and Its Competitors

Table 81. Beijing Beilai Biotechnology Co. Ltd Mesenchymal Stem Cell Therapy(MSCT) Product Offered

Table 82. Beijing Beilai Biotechnology Co. Ltd Mesenchymal Stem Cell Therapy(MSCT) Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 83. Beijing Beilai Biotechnology Co. Ltd Main Business

Table 84. Beijing Beilai Biotechnology Co. Ltd Latest Developments

Table 85. Shanghai Aisar Biotechnology Co. Ltd Details, Company Type, Mesenchymal Stem Cell Therapy(MSCT) Area Served and Its Competitors

Table 86. Shanghai Aisar Biotechnology Co. Ltd Mesenchymal Stem Cell Therapy(MSCT) Product Offered

Table 87. Shanghai Aisar Biotechnology Co. Ltd Mesenchymal Stem Cell Therapy(MSCT) Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 88. Shanghai Aisar Biotechnology Co. Ltd Main Business

Table 89. Shanghai Aisar Biotechnology Co. Ltd Latest Developments

Table 90. Jiuzhitang Meike (Beijing) Cell Technology Co. Ltd Details, Company Type, Mesenchymal Stem Cell Therapy(MSCT) Area Served and Its Competitors

Table 91. Jiuzhitang Meike (Beijing) Cell Technology Co. Ltd Mesenchymal Stem Cell Therapy(MSCT) Product Offered

Table 92. Jiuzhitang Meike (Beijing) Cell Technology Co. Ltd Mesenchymal Stem Cell Therapy(MSCT) Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 93. Jiuzhitang Meike (Beijing) Cell Technology Co. Ltd Main Business

Table 94. Jiuzhitang Meike (Beijing) Cell Technology Co. Ltd Latest Developments

Table 95. Beijing Han's United Biotechnology Co. Ltd Details, Company Type, Mesenchymal Stem Cell Therapy(MSCT) Area Served and Its Competitors

Table 96. Beijing Han's United Biotechnology Co. Ltd Mesenchymal Stem Cell Therapy(MSCT) Product Offered

Table 97. Beijing Han's United Biotechnology Co. Ltd Mesenchymal Stem Cell Therapy(MSCT) Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 98. Beijing Han's United Biotechnology Co. Ltd Main Business

Table 99. Beijing Han's United Biotechnology Co. Ltd Latest Developments

Table 100. Bosheng Excellence Biotechnology (Beijing) Co. Ltd Details, Company Type, Mesenchymal Stem Cell Therapy(MSCT) Area Served and Its Competitors

Table 101. Bosheng Excellence Biotechnology (Beijing) Co. Ltd Mesenchymal Stem Cell Therapy(MSCT) Product Offered

Table 102. Bosheng Excellence Biotechnology (Beijing) Co. Ltd Mesenchymal Stem Cell Therapy(MSCT) Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 103. Bosheng Excellence Biotechnology (Beijing) Co. Ltd Main Business

Table 104. Bosheng Excellence Biotechnology (Beijing) Co. Ltd Latest Developments

Table 105. Cellular Biomedicine Group Details, Company Type, Mesenchymal Stem Cell Therapy(MSCT) Area Served and Its Competitors

Table 106. Cellular Biomedicine Group Mesenchymal Stem Cell Therapy(MSCT) Product Offered

Table 107. Cellular Biomedicine Group Mesenchymal Stem Cell Therapy(MSCT) Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 108. Cellular Biomedicine Group Main Business

Table 109. Cellular Biomedicine Group Latest Developments

Table 110. Guangzhou Celera Stem Cell Technology Co. Ltd. Details, Company Type, Mesenchymal Stem Cell Therapy(MSCT) Area Served and Its Competitors

Table 111. Guangzhou Celera Stem Cell Technology Co. Ltd. Mesenchymal Stem Cell Therapy(MSCT) Product Offered

Table 112. Guangzhou Celera Stem Cell Technology Co. Ltd. Mesenchymal Stem Cell Therapy(MSCT) Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 113. Guangzhou Celera Stem Cell Technology Co. Ltd. Main Business

Table 114. Guangzhou Celera Stem Cell Technology Co. Ltd. Latest Developments

Table 115. CryoCord Sdn Bhd Details, Company Type, Mesenchymal Stem Cell

Therapy(MSCT) Area Served and Its Competitors

Table 116. CryoCord Sdn Bhd Mesenchymal Stem Cell Therapy(MSCT) Product Offered

Table 117. CryoCord Sdn Bhd Mesenchymal Stem Cell Therapy(MSCT) Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 118. CryoCord Sdn Bhd Main Business

Table 119. CryoCord Sdn Bhd Latest Developments

Table 120. Cytopeutics Sdn Bhd Details, Company Type, Mesenchymal Stem Cell Therapy(MSCT) Area Served and Its Competitors

Table 121. Cytopeutics Sdn Bhd Mesenchymal Stem Cell Therapy(MSCT) Product Offered

Table 122. Cytopeutics Sdn Bhd Mesenchymal Stem Cell Therapy(MSCT) Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 123. Cytopeutics Sdn Bhd Main Business

Table 124. Cytopeutics Sdn Bhd Latest Developments

Table 125. Stempeutics Research Pvt Ltd Details, Company Type, Mesenchymal Stem Cell Therapy(MSCT) Area Served and Its Competitors

Table 126. Stempeutics Research Pvt Ltd Mesenchymal Stem Cell Therapy(MSCT) Product Offered

Table 127. Stempeutics Research Pvt Ltd Mesenchymal Stem Cell Therapy(MSCT) Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 128. Stempeutics Research Pvt Ltd Main Business

Table 129. Stempeutics Research Pvt Ltd Latest Developments

Table 130. Pharmicell Details, Company Type, Mesenchymal Stem Cell Therapy(MSCT) Area Served and Its Competitors

Table 131. Pharmicell Mesenchymal Stem Cell Therapy(MSCT) Product Offered

Table 132. Pharmicell Mesenchymal Stem Cell Therapy(MSCT) Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 133. Pharmicell Main Business

Table 134. Pharmicell Latest Developments

Table 135. MEDIPOST Details, Company Type, Mesenchymal Stem Cell Therapy(MSCT) Area Served and Its Competitors

Table 136. MEDIPOST Mesenchymal Stem Cell Therapy(MSCT) Product Offered

Table 137. MEDIPOST Mesenchymal Stem Cell Therapy(MSCT) Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 138. MEDIPOST Main Business

Table 139. MEDIPOST Latest Developments

Table 140. JCR Pharmaceuticals Details, Company Type, Mesenchymal Stem Cell Therapy(MSCT) Area Served and Its Competitors

Table 141. JCR Pharmaceuticals Mesenchymal Stem Cell Therapy(MSCT) Product Offered

Table 142. JCR Pharmaceuticals Mesenchymal Stem Cell Therapy(MSCT) Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 143. JCR Pharmaceuticals Main Business

Table 144. JCR Pharmaceuticals Latest Developments

Table 145. Anterogen Details, Company Type, Mesenchymal Stem Cell Therapy(MSCT) Area Served and Its Competitors

Table 146. Anterogen Mesenchymal Stem Cell Therapy(MSCT) Product Offered

Table 147. Anterogen Mesenchymal Stem Cell Therapy(MSCT) Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 148. Anterogen Main Business

Table 149. Anterogen Latest Developments

Table 150. CORESTEMCHEMON Details, Company Type, Mesenchymal Stem Cell Therapy(MSCT) Area Served and Its Competitors

Table 151. CORESTEMCHEMON Mesenchymal Stem Cell Therapy(MSCT) Product Offered

Table 152. CORESTEMCHEMON Mesenchymal Stem Cell Therapy(MSCT) Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 153. CORESTEMCHEMON Main Business

Table 154. CORESTEMCHEMON Latest Developments

Table 155. Nipro Corporation Details, Company Type, Mesenchymal Stem Cell Therapy(MSCT) Area Served and Its Competitors

Table 156. Nipro Corporation Mesenchymal Stem Cell Therapy(MSCT) Product Offered

Table 157. Nipro Corporation Mesenchymal Stem Cell Therapy(MSCT) Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 158. Nipro Corporation Main Business

Table 159. Nipro Corporation Latest Developments

Table 160. Takeda Pharmaceutical Details, Company Type, Mesenchymal Stem Cell Therapy(MSCT) Area Served and Its Competitors

Table 161. Takeda Pharmaceutical Mesenchymal Stem Cell Therapy(MSCT) Product Offered

Table 162. Takeda Pharmaceutical Mesenchymal Stem Cell Therapy(MSCT) Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 163. Takeda Pharmaceutical Main Business

Table 164. Takeda Pharmaceutical Latest Developments

Table 165. Hope Biosciences Details, Company Type, Mesenchymal Stem Cell Therapy(MSCT) Area Served and Its Competitors

Table 166. Hope Biosciences Mesenchymal Stem Cell Therapy(MSCT) Product Offered

Table 167. Hope Biosciences Mesenchymal Stem Cell Therapy(MSCT) Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 168. Hope Biosciences Main Business

Table 169. Hope Biosciences Latest Developments

Table 170. Stemedica Cell Technologies Details, Company Type, Mesenchymal Stem Cell Therapy(MSCT) Area Served and Its Competitors

Table 171. Stemedica Cell Technologies Mesenchymal Stem Cell Therapy(MSCT) Product Offered

Table 172. Stemedica Cell Technologies Mesenchymal Stem Cell Therapy(MSCT) Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 173. Stemedica Cell Technologies Main Business

Table 174. Stemedica Cell Technologies Latest Developments

Table 175. Celltex Therapeutics Details, Company Type, Mesenchymal Stem Cell Therapy(MSCT) Area Served and Its Competitors

Table 176. Celltex Therapeutics Mesenchymal Stem Cell Therapy(MSCT) Product Offered

Table 177. Celltex Therapeutics Mesenchymal Stem Cell Therapy(MSCT) Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 178. Celltex Therapeutics Main Business

Table 179. Celltex Therapeutics Latest Developments

## List Of Figures

### LIST OF FIGURES

- Figure 1. Mesenchymal Stem Cell Therapy(MSCT) Report Years Considered
- Figure 2. Research Objectives
- Figure 3. Research Methodology
- Figure 4. Research Process and Data Source
- Figure 5. Global Mesenchymal Stem Cell Therapy(MSCT) Market Size Growth Rate (2021-2032) (\$ millions)
- Figure 6. Mesenchymal Stem Cell Therapy(MSCT) Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 7. Mesenchymal Stem Cell Therapy(MSCT) Sales Market Share by Country/Region (2025)
- Figure 8. Mesenchymal Stem Cell Therapy(MSCT) Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 9. Global Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Type in 2025
- Figure 10. Global Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Donor Relations in 2025
- Figure 11. Global Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Source of Tissue in 2025
- Figure 12. Global Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Route of Administration in 2025
- Figure 13. Mesenchymal Stem Cell Therapy(MSCT) in Cancer Therapy
- Figure 14. Global Mesenchymal Stem Cell Therapy(MSCT) Market: Cancer Therapy (2021-2026) & (\$ millions)
- Figure 15. Mesenchymal Stem Cell Therapy(MSCT) in Inflammatory Diseases
- Figure 16. Global Mesenchymal Stem Cell Therapy(MSCT) Market: Inflammatory Diseases (2021-2026) & (\$ millions)
- Figure 17. Mesenchymal Stem Cell Therapy(MSCT) in Fibrotic Diseases
- Figure 18. Global Mesenchymal Stem Cell Therapy(MSCT) Market: Fibrotic Diseases (2021-2026) & (\$ millions)
- Figure 19. Mesenchymal Stem Cell Therapy(MSCT) in Others
- Figure 20. Global Mesenchymal Stem Cell Therapy(MSCT) Market: Others (2021-2026) & (\$ millions)
- Figure 21. Global Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Application in 2025
- Figure 22. Global Mesenchymal Stem Cell Therapy(MSCT) Revenue Market Share by

Player in 2025

Figure 23. Global Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Region (2021-2026)

Figure 24. Americas Mesenchymal Stem Cell Therapy(MSCT) Market Size 2021-2026 (\$ millions)

Figure 25. APAC Mesenchymal Stem Cell Therapy(MSCT) Market Size 2021-2026 (\$ millions)

Figure 26. Europe Mesenchymal Stem Cell Therapy(MSCT) Market Size 2021-2026 (\$ millions)

Figure 27. Middle East & Africa Mesenchymal Stem Cell Therapy(MSCT) Market Size 2021-2026 (\$ millions)

Figure 28. Americas Mesenchymal Stem Cell Therapy(MSCT) Value Market Share by Country in 2025

Figure 29. United States Mesenchymal Stem Cell Therapy(MSCT) Market Size Growth 2021-2026 (\$ millions)

Figure 30. Canada Mesenchymal Stem Cell Therapy(MSCT) Market Size Growth 2021-2026 (\$ millions)

Figure 31. Mexico Mesenchymal Stem Cell Therapy(MSCT) Market Size Growth 2021-2026 (\$ millions)

Figure 32. Brazil Mesenchymal Stem Cell Therapy(MSCT) Market Size Growth 2021-2026 (\$ millions)

Figure 33. APAC Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Region in 2025

Figure 34. APAC Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Type (2021-2026)

Figure 35. APAC Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Application (2021-2026)

Figure 36. China Mesenchymal Stem Cell Therapy(MSCT) Market Size Growth 2021-2026 (\$ millions)

Figure 37. Japan Mesenchymal Stem Cell Therapy(MSCT) Market Size Growth 2021-2026 (\$ millions)

Figure 38. South Korea Mesenchymal Stem Cell Therapy(MSCT) Market Size Growth 2021-2026 (\$ millions)

Figure 39. Southeast Asia Mesenchymal Stem Cell Therapy(MSCT) Market Size Growth 2021-2026 (\$ millions)

Figure 40. India Mesenchymal Stem Cell Therapy(MSCT) Market Size Growth 2021-2026 (\$ millions)

Figure 41. Australia Mesenchymal Stem Cell Therapy(MSCT) Market Size Growth 2021-2026 (\$ millions)

Figure 42. Europe Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Country in 2025

Figure 43. Europe Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Type (2021-2026)

Figure 44. Europe Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Application (2021-2026)

Figure 45. Germany Mesenchymal Stem Cell Therapy(MSCT) Market Size Growth 2021-2026 (\$ millions)

Figure 46. France Mesenchymal Stem Cell Therapy(MSCT) Market Size Growth 2021-2026 (\$ millions)

Figure 47. UK Mesenchymal Stem Cell Therapy(MSCT) Market Size Growth 2021-2026 (\$ millions)

Figure 48. Italy Mesenchymal Stem Cell Therapy(MSCT) Market Size Growth 2021-2026 (\$ millions)

Figure 49. Russia Mesenchymal Stem Cell Therapy(MSCT) Market Size Growth 2021-2026 (\$ millions)

Figure 50. Middle East & Africa Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Region (2021-2026)

Figure 51. Middle East & Africa Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Type (2021-2026)

Figure 52. Middle East & Africa Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share by Application (2021-2026)

Figure 53. Egypt Mesenchymal Stem Cell Therapy(MSCT) Market Size Growth 2021-2026 (\$ millions)

Figure 54. South Africa Mesenchymal Stem Cell Therapy(MSCT) Market Size Growth 2021-2026 (\$ millions)

Figure 55. Israel Mesenchymal Stem Cell Therapy(MSCT) Market Size Growth 2021-2026 (\$ millions)

Figure 56. Turkey Mesenchymal Stem Cell Therapy(MSCT) Market Size Growth 2021-2026 (\$ millions)

Figure 57. GCC Countries Mesenchymal Stem Cell Therapy(MSCT) Market Size Growth 2021-2026 (\$ millions)

Figure 58. Americas Mesenchymal Stem Cell Therapy(MSCT) Market Size 2027-2032 (\$ millions)

Figure 59. APAC Mesenchymal Stem Cell Therapy(MSCT) Market Size 2027-2032 (\$ millions)

Figure 60. Europe Mesenchymal Stem Cell Therapy(MSCT) Market Size 2027-2032 (\$ millions)

Figure 61. Middle East & Africa Mesenchymal Stem Cell Therapy(MSCT) Market Size

2027-2032 (\$ millions)

Figure 62. United States Mesenchymal Stem Cell Therapy(MSCT) Market Size

2027-2032 (\$ millions)

Figure 63. Canada Mesenchymal Stem Cell Therapy(MSCT) Market Size 2027-2032 (\$ millions)

Figure 64. Mexico Mesenchymal Stem Cell Therapy(MSCT) Market Size 2027-2032 (\$ millions)

Figure 65. Brazil Mesenchymal Stem Cell Therapy(MSCT) Market Size 2027-2032 (\$ millions)

Figure 66. China Mesenchymal Stem Cell Therapy(MSCT) Market Size 2027-2032 (\$ millions)

Figure 67. Japan Mesenchymal Stem Cell Therapy(MSCT) Market Size 2027-2032 (\$ millions)

Figure 68. Korea Mesenchymal Stem Cell Therapy(MSCT) Market Size 2027-2032 (\$ millions)

Figure 69. Southeast Asia Mesenchymal Stem Cell Therapy(MSCT) Market Size 2027-2032 (\$ millions)

Figure 70. India Mesenchymal Stem Cell Therapy(MSCT) Market Size 2027-2032 (\$ millions)

Figure 71. Australia Mesenchymal Stem Cell Therapy(MSCT) Market Size 2027-2032 (\$ millions)

Figure 72. Germany Mesenchymal Stem Cell Therapy(MSCT) Market Size 2027-2032 (\$ millions)

Figure 73. France Mesenchymal Stem Cell Therapy(MSCT) Market Size 2027-2032 (\$ millions)

Figure 74. UK Mesenchymal Stem Cell Therapy(MSCT) Market Size 2027-2032 (\$ millions)

Figure 75. Italy Mesenchymal Stem Cell Therapy(MSCT) Market Size 2027-2032 (\$ millions)

Figure 76. Russia Mesenchymal Stem Cell Therapy(MSCT) Market Size 2027-2032 (\$ millions)

Figure 77. Egypt Mesenchymal Stem Cell Therapy(MSCT) Market Size 2027-2032 (\$ millions)

Figure 78. South Africa Mesenchymal Stem Cell Therapy(MSCT) Market Size 2027-2032 (\$ millions)

Figure 79. Israel Mesenchymal Stem Cell Therapy(MSCT) Market Size 2027-2032 (\$ millions)

Figure 80. Turkey Mesenchymal Stem Cell Therapy(MSCT) Market Size 2027-2032 (\$ millions)

Figure 81. Global Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share Forecast by Type (2027-2032)

Figure 82. Global Mesenchymal Stem Cell Therapy(MSCT) Market Size Market Share Forecast by Application (2027-2032)

Figure 83. GCC Countries Mesenchymal Stem Cell Therapy(MSCT) Market Size 2027-2032 (\$ millions)

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