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T-cell Therapy Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application

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Abstracts

T-cell Therapy Market Summary

Introduction

T-cell therapy represents a transformative segment of immunotherapy, leveraging genetically modified T-cells to target and destroy cancer cells, primarily in hematological malignancies. Originating with the discovery of CAR-T technology in 1986, the field achieved a milestone in 2017 with the approval of Kymriah by Novartis, the first CAR-T therapy globally. Predominantly focused on CD19 and BCMA targets, approved therapies address conditions like acute lymphocytic leukemia (ALL) and diffuse large B-cell lymphoma (DLBCL), though applications in solid tumors remain limited. The market is defined by high-cost, complex manufacturing processes, and a shift toward universal CAR-T solutions and solid tumor breakthroughs, exemplified by Huadao Biotech's HD004 approval in China in November 2024 for CLDN18.2-positive solid tumors.

Market Size and Growth Forecast

The T-cell therapy market is anticipated to reach USD 9.0 billion to USD 11.0 billion by 2025, reflecting its rapid adoption in oncology. By 2030, the market could expand to USD 30 billion to USD 45 billion, propelled by a CAGR of 20% to 30%. This explosive growth is underpinned by technological advancements, increasing regulatory approvals, and a growing patient pool, with the World Health Organization forecasting a 77% rise in cancer cases from 2022 to 2050. The market's trajectory hinges on overcoming production and cost barriers while broadening therapeutic applications beyond blood cancers.

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Regional Analysis

North America: Expected to grow at 20% to 25%, the U.S. leads with a strong biotech ecosystem and early adoption of therapies like Kymriah and Yescarta. Trends focus on scaling manufacturing and integrating next-generation CAR-T for solid tumors.

Europe: Forecasted at 18% to 23%, Germany and the UK drive growth with supportive reimbursement policies. Trends emphasize clinical trials for off-the-shelf therapies and addressing high treatment costs through public-private partnerships.

Asia Pacific: Projected at 25% to 30%, China emerges as a powerhouse with innovations like HD004, alongside Japan’s research focus. Trends highlight cost reduction and localized production to meet rising cancer burdens.

South America: Anticipated at 15% to 20%, Brazil shows gradual uptake tied to healthcare investments. Trends focus on access challenges and reliance on imported therapies, with potential for regional manufacturing.

Middle East and Africa: Expected at 12% to 18%, the UAE and South Africa lead with nascent adoption. Trends center on building oncology infrastructure and leveraging international collaborations to introduce T-cell therapies.

Application Analysis

Acute Lymphocytic Leukemia (ALL): Projected at 20% to 25%, ALL benefits from established CD19-targeted therapies like Kymriah. Trends focus on pediatric applications and improving long-term remission rates.

Diffuse Large B-Cell Lymphoma (DLBCL): Expected at 22% to 27%, DLBCL dominates with therapies like Yescarta. Trends emphasize frontline use and combination strategies to enhance efficacy.

Follicular Lymphoma: Forecasted at 18% to 23%, this segment grows with expanded indications for existing therapies. Trends highlight precision targeting and managing relapsed cases.

Non-Hodgkin’s Lymphoma: Anticipated at 20% to 25%, it overlaps with DLBCL and follicular lymphoma, driving demand. Trends focus on broadening CAR-T accessibility

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and addressing resistance.

Mantel Cell Lymphoma: Projected at 18% to 22%, therapies like Tecartus fuel growth. Trends emphasize niche applications and optimizing patient selection.

Others: Expected at 25% to 30%, this includes emerging solid tumor therapies like HD004. Trends spotlight breakthroughs in solid tumor penetration and universal CAR-T development.

Key Market Players

Novartis: A Swiss pioneer, Novartis launched Kymriah and continues to lead in CAR-T innovation for blood cancers.

Gilead: A U.S. giant via its Kite Pharma acquisition, Gilead drives Yescarta’s success and explores solid tumor applications.

Bristol Myers Squibb: A U.S. leader, BMS advances therapies like Breyanzi, focusing on lymphoma and scalability.

JW Therapeutics: A Chinese innovator, JW leverages regional expertise to develop cost-effective CAR-T solutions.

Porter’s Five Forces Analysis

Threat of New Entrants: Moderate, as high R&D costs, regulatory complexity, and manufacturing challenges deter entry, though biotech startups with novel platforms pose a threat.

Threat of Substitutes: Moderate-to-low, with traditional chemotherapy and checkpoint inhibitors as alternatives, but T-cell therapy’s precision and efficacy limit substitution in approved indications.

Bargaining Power of Buyers: Moderate, as patients and insurers have limited options due to therapy specificity, though high costs empower payers to negotiate pricing.

Bargaining Power of Suppliers: Moderate-to-high, with reliance on specialized biotech suppliers for vectors and cell processing, giving key players leverage.

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Competitive Rivalry: High, driven by leaders like Novartis and Gilead racing to expand indications and reduce costs, intensified by emerging players like JW Therapeutics in Asia.

Market Opportunities and Challenges

Opportunities

Rising Cancer Incidence: A projected 35 million new cases by 2050 amplifies demand, particularly in Asia Pacific and North America, supporting market expansion.

Solid Tumor Breakthroughs: Innovations like HD004 signal potential beyond blood cancers, opening vast new patient pools.

Universal CAR-T: Off-the-shelf therapies promise scalability and cost reduction, enhancing accessibility globally.

Regulatory Support: Fast-track designations and orphan drug incentives accelerate approvals, boosting investment.

Collaborations: Partnerships between firms like Gilead and regional players like JW Therapeutics optimize innovation and market reach.

Challenges

High Costs: Prices exceeding USD 300,000 per treatment limit adoption, especially in emerging markets, despite reimbursement efforts.

Manufacturing Complexity: Lengthy production cycles hinder scalability, requiring significant infrastructure investment.

Solid Tumor Limitations: Limited efficacy in solid tumors due to microenvironment barriers slows broader application.

Regulatory Hurdles: Stringent safety and efficacy requirements delay approvals,

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particularly for novel targets.

Access Disparities: High costs and infrastructure needs restrict penetration in regions like Africa and South America.

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Contents

CHAPTER 1 EXECUTIVE SUMMARY

CHAPTER 2 ABBREVIATION AND ACRONYMS

CHAPTER 3 PREFACE

3.1 Research Scope
3.2 Research Sources
  3.2.1 Data Sources
  3.2.2 Assumptions
3.3 Research Method
Chapter Four Market Landscape
4.1 Market Overview
4.2 Classification/Types
4.3 Application/End Users

CHAPTER 5 MARKET TREND ANALYSIS

5.1 Introduction
5.2 Drivers
5.3 Restraints
5.4 Opportunities
5.5 Threats

CHAPTER 6 INDUSTRY CHAIN ANALYSIS

6.1 Upstream/Suppliers Analysis
6.2 T-Cell Therapy Analysis
  6.2.1 Technology Analysis
  6.2.2 Cost Analysis
  6.2.3 Market Channel Analysis
6.3 Downstream Buyers/End Users

CHAPTER 7 LATEST MARKET DYNAMICS

7.1 Latest News
7.2 Merger and Acquisition

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7.3 Planned/Future Project
7.4 Policy Dynamics

CHAPTER 8 HISTORICAL AND FORECAST T-CELL THERAPY MARKET IN NORTH AMERICA (2020-2030)

8.1 T-Cell Therapy Market Size
8.2 T-Cell Therapy Market by End Use
8.3 Competition by Players/Suppliers
8.4 T-Cell Therapy Market Size by Type
8.5 Key Countries Analysis
  8.5.1 United States
  8.5.2 Canada
  8.5.3 Mexico

CHAPTER 9 HISTORICAL AND FORECAST T-CELL THERAPY MARKET IN SOUTH AMERICA (2020-2030)

9.1 T-Cell Therapy Market Size
9.2 T-Cell Therapy Market by End Use
9.3 Competition by Players/Suppliers
9.4 T-Cell Therapy Market Size by Type
9.5 Key Countries Analysis
  9.5.1 Brazil
  9.5.2 Argentina
  9.5.3 Chile
  9.5.4 Peru

CHAPTER 10 HISTORICAL AND FORECAST T-CELL THERAPY MARKET IN ASIA & PACIFIC (2020-2030)

10.1 T-Cell Therapy Market Size
10.2 T-Cell Therapy Market by End Use
10.3 Competition by Players/Suppliers
10.4 T-Cell Therapy Market Size by Type
10.5 Key Countries Analysis
  10.5.1 China
  10.5.2 India
  10.5.3 Japan

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10.5.4 South Korea
10.5.5 Southest Asia
10.5.6 Australia

CHAPTER 11 HISTORICAL AND FORECAST T-CELL THERAPY MARKET IN EUROPE (2020-2030)

11.1 T-Cell Therapy Market Size
11.2 T-Cell Therapy Market by End Use
11.3 Competition by Players/Suppliers
11.4 T-Cell Therapy Market Size by Type
11.5 Key Countries Analysis
11.5.1 Germany
11.5.2 France
11.5.3 United Kingdom
11.5.4 Italy
11.5.5 Spain
11.5.6 Belgium
11.5.7 Netherlands
11.5.8 Austria
11.5.9 Poland
11.5.10 Russia

CHAPTER 12 HISTORICAL AND FORECAST T-CELL THERAPY MARKET IN MEA (2020-2030)

12.1 T-Cell Therapy Market Size
12.2 T-Cell Therapy Market by End Use
12.3 Competition by Players/Suppliers
12.4 T-Cell Therapy Market Size by Type
12.5 Key Countries Analysis
12.5.1 Egypt
12.5.2 Israel
12.5.3 South Africa
12.5.4 Gulf Cooperation Council Countries
12.5.5 Turkey

CHAPTER 13 SUMMARY FOR GLOBAL T-CELL THERAPY MARKET (2020-2025)

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13.1 T-Cell Therapy Market Size
13.2 T-Cell Therapy Market by End Use
13.3 Competition by Players/Suppliers
13.4 T-Cell Therapy Market Size by Type

CHAPTER 14 GLOBAL T-CELL THERAPY MARKET FORECAST (2025-2030)

14.1 T-Cell Therapy Market Size Forecast
14.2 T-Cell Therapy Application Forecast
14.3 Competition by Players/Suppliers
14.4 T-Cell Therapy Type Forecast

CHAPTER 15 ANALYSIS OF GLOBAL KEY VENDORS

15.1 Novartis
  15.1.1 Company Profile
  15.1.2 Main Business and T-cell Therapy Information
  15.1.3 SWOT Analysis of Novartis
  15.1.4 Novartis T-cell Therapy Revenue, Gross Margin and Market Share (2020-2025)
15.2 Gilead
  15.2.1 Company Profile
  15.2.2 Main Business and T-cell Therapy Information
  15.2.3 SWOT Analysis of Gilead
  15.2.4 Gilead T-cell Therapy Revenue, Gross Margin and Market Share (2020-2025)
15.3 Bristol Myers Squibb
  15.3.1 Company Profile
  15.3.2 Main Business and T-cell Therapy Information
  15.3.3 SWOT Analysis of Bristol Myers Squibb
  15.3.4 Bristol Myers Squibb T-cell Therapy Revenue, Gross Margin and Market Share (2020-2025)
15.4 JW Therapeutics
  15.4.1 Company Profile
  15.4.2 Main Business and T-cell Therapy Information
  15.4.3 SWOT Analysis of JW Therapeutics
  15.4.4 JW Therapeutics T-cell Therapy Revenue, Gross Margin and Market Share (2020-2025)
Please ask for sample pages for full companies list
Tables and Figures
Table Abbreviation and Acronyms

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Table Research Scope of T-Cell Therapy Report
Table Data Sources of T-Cell Therapy Report
Table Major Assumptions of T-Cell Therapy Report
Figure Market Size Estimated Method
Figure Major Forecasting Factors
Figure T-Cell Therapy Picture
Table T-Cell Therapy Classification
Table T-Cell Therapy Applications
Table Drivers of T-Cell Therapy Market
Table Restraints of T-Cell Therapy Market
Table Opportunities of T-Cell Therapy Market
Table Threats of T-Cell Therapy Market
Table Covid-19 Impact For T-Cell Therapy Market
Table Raw Materials Suppliers
Table Different Production Methods of T-Cell Therapy
Table Cost Structure Analysis of T-Cell Therapy
Table Key End Users
Table Latest News of T-Cell Therapy Market
Table Merger and Acquisition
Table Planned/Future Project of T-Cell Therapy Market
Table Policy of T-Cell Therapy Market
Table 2020-2030 North America T-Cell Therapy Market Size
Figure 2020-2030 North America T-Cell Therapy Market Size and CAGR
Table 2020-2030 North America T-Cell Therapy Market Size by Application
Table 2020-2025 North America T-Cell Therapy Key Players Revenue
Table 2020-2025 North America T-Cell Therapy Key Players Market Share
Table 2020-2030 North America T-Cell Therapy Market Size by Type
Table 2020-2030 United States T-Cell Therapy Market Size
Table 2020-2030 Canada T-Cell Therapy Market Size
Table 2020-2030 Mexico T-Cell Therapy Market Size
Table 2020-2030 South America T-Cell Therapy Market Size
Figure 2020-2030 South America T-Cell Therapy Market Size and CAGR
Table 2020-2030 South America T-Cell Therapy Market Size by Application
Table 2020-2025 South America T-Cell Therapy Key Players Revenue
Table 2020-2025 South America T-Cell Therapy Key Players Market Share
Table 2020-2030 South America T-Cell Therapy Market Size by Type
Table 2020-2030 Brazil T-Cell Therapy Market Size
Table 2020-2030 Argentina T-Cell Therapy Market Size
Table 2020-2030 Chile T-Cell Therapy Market Size

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Table 2020-2030 Peru T-Cell Therapy Market Size
Table 2020-2030 Asia & Pacific T-Cell Therapy Market Size
Figure 2020-2030 Asia & Pacific T-Cell Therapy Market Size and CAGR
Table 2020-2030 Asia & Pacific T-Cell Therapy Market Size by Application
Table 2020-2025 Asia & Pacific T-Cell Therapy Key Players Revenue
Table 2020-2025 Asia & Pacific T-Cell Therapy Key Players Market Share
Table 2020-2030 Asia & Pacific T-Cell Therapy Market Size by Type
Table 2020-2030 China T-Cell Therapy Market Size
Table 2020-2030 India T-Cell Therapy Market Size
Table 2020-2030 Japan T-Cell Therapy Market Size
Table 2020-2030 South Korea T-Cell Therapy Market Size
Table 2020-2030 Southeast Asia T-Cell Therapy Market Size
Table 2020-2030 Australia T-Cell Therapy Market Size
Table 2020-2030 Europe T-Cell Therapy Market Size
Figure 2020-2030 Europe T-Cell Therapy Market Size and CAGR
Table 2020-2030 Europe T-Cell Therapy Market Size by Application
Table 2020-2025 Europe T-Cell Therapy Key Players Revenue
Table 2020-2025 Europe T-Cell Therapy Key Players Market Share
Table 2020-2030 Europe T-Cell Therapy Market Size by Type
Table 2020-2030 Germany T-Cell Therapy Market Size
Table 2020-2030 France T-Cell Therapy Market Size
Table 2020-2030 United Kingdom T-Cell Therapy Market Size
Table 2020-2030 Italy T-Cell Therapy Market Size
Table 2020-2030 Spain T-Cell Therapy Market Size
Table 2020-2030 Belgium T-Cell Therapy Market Size
Table 2020-2030 Netherlands T-Cell Therapy Market Size
Table 2020-2030 Austria T-Cell Therapy Market Size
Table 2020-2030 Poland T-Cell Therapy Market Size
Table 2020-2030 Russia T-Cell Therapy Market Size
Table 2020-2030 MEA T-Cell Therapy Market Size
Figure 2020-2030 MEA T-Cell Therapy Market Size and CAGR
Table 2020-2030 MEA T-Cell Therapy Market Size by Application
Table 2020-2025 MEA T-Cell Therapy Key Players Revenue
Table 2020-2025 MEA T-Cell Therapy Key Players Market Share
Table 2020-2030 MEA T-Cell Therapy Market Size by Type
Table 2020-2030 Egypt T-Cell Therapy Market Size
Table 2020-2030 Israel T-Cell Therapy Market Size
Table 2020-2030 South Africa T-Cell Therapy Market Size
Table 2020-2030 Gulf Cooperation Council Countries T-Cell Therapy Market Size

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Table 2020-2030 Turkey T-Cell Therapy Market Size
Table 2020-2025 Global T-Cell Therapy Market Size by Region
Table 2020-2025 Global T-Cell Therapy Market Size Share by Region
Table 2020-2025 Global T-Cell Therapy Market Size by Application
Table 2020-2025 Global T-Cell Therapy Market Share by Application
Table 2020-2025 Global T-Cell Therapy Key Vendors Revenue
Figure 2020-2025 Global T-Cell Therapy Market Size and Growth Rate
Table 2020-2025 Global T-Cell Therapy Key Vendors Market Share
Table 2020-2025 Global T-Cell Therapy Market Size by Type
Table 2020-2025 Global T-Cell Therapy Market Share by Type
Table 2025-2030 Global T-Cell Therapy Market Size by Region
Table 2025-2030 Global T-Cell Therapy Market Size Share by Region
Table 2025-2030 Global T-Cell Therapy Market Size by Application
Table 2025-2030 Global T-Cell Therapy Market Share by Application
Table 2025-2030 Global T-Cell Therapy Key Vendors Revenue
Figure 2025-2030 Global T-Cell Therapy Market Size and Growth Rate
Table 2025-2030 Global T-Cell Therapy Key Vendors Market Share
Table 2025-2030 Global T-Cell Therapy Market Size by Type
Table 2025-2030 T-Cell Therapy Global Market Share by Type

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