

T-cell Therapy Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Therapy Type (CAR T-cell Therapy, T Cell Receptor (TCR)-based, Tumor Infiltrating Lymphocytes (TIL)-based)), By Indication (Hematologic Malignancies, Solid Tumors, Others), By Region and Competition, 2019-2029F

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Abstracts

Global T-cell Therapy Market was valued at USD 2.65 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 9.88% through 2029. The Global T-cell Therapy Market has emerged as a groundbreaking frontier in the field of oncology, revolutionizing cancer treatment approaches. T-cell therapy involves harnessing the power of the patient's immune system by genetically modifying their T cells to target and destroy cancer cells. This innovative approach has shown remarkable success in treating various hematological malignancies and is increasingly being explored for solid tumors. The market's growth is propelled by the rising incidence of cancer worldwide and the need for more effective and personalized treatment options. Key players in the industry are investing heavily in research and development to expand the application of T-cell therapy across different cancer types and enhance its overall efficacy. One of the notable drivers of the T-cell therapy market is the approval and commercialization of several CAR-T (Chimeric Antigen Receptor T-cell) therapies. CAR-T therapies have demonstrated unprecedented success in treating certain types of blood cancers, such as leukemia and lymphoma, leading to increased adoption and market penetration. Moreover, advancements in genetic engineering technologies, such as CRISPR-Cas9, have facilitated the development of next-generation T-cell therapies with improved precision and safety profiles. Despite the promising potential, challenges exist in the form of high treatment costs, logistical complexities associated with

manufacturing and administering personalized cell therapies, and potential side effects. However, ongoing research and clinical trials aim to address these challenges and further optimize T-cell therapy protocols. The market landscape is dynamic, with collaborations, partnerships, and mergers shaping the competitive environment.

Key Market Drivers

Rising Global Incidence Of Cancer

The escalating global incidence of cancer is a primary catalyst propelling the remarkable growth of the Global T-cell Therapy Market. According to the World Health Organization (WHO), cancer is a leading cause of morbidity and mortality worldwide, with an estimated 19.3 million new cancer cases and almost 10 million cancer-related deaths reported in 2020. This alarming prevalence of cancer has created an urgent need for more effective and targeted treatment modalities, giving rise to the prominence of innovative therapies such as T-cell therapy. The sheer burden of cancer cases across diverse demographics has intensified the demand for advanced and personalized treatment options. T-cell therapy, particularly Chimeric Antigen Receptor T-cell (CAR-T) therapy, has emerged as a transformative approach by harnessing the patient's immune system to combat cancer cells. The success of CAR-T therapies in treating hematological malignancies, such as leukemia and lymphoma, has underscored the potential of T-cell therapy as a groundbreaking solution in the oncology landscape. As the prevalence of cancer continues to rise globally, healthcare providers, researchers, and pharmaceutical companies are increasingly recognizing the need for innovative therapies that can address the diverse and complex nature of cancer. T-cell therapy, with its ability to specifically target cancer cells based on genetic markers, offers a promising avenue for personalized and precise cancer treatment. This has resulted in a surge of investments in research and development within the T-cell therapy space, as stakeholders strive to meet the growing demand for effective cancer therapies.

Furthermore, the rising incidence of cancer is not only driving the demand for T-cell therapy but also influencing the exploration of its applicability across a broader spectrum of cancer types. Researchers and clinicians are actively investigating ways to optimize T-cell therapies for solid tumors, expanding the potential impact of these treatments beyond hematological malignancies. This diversification in the scope of T-cell therapy applications underscores its versatility in addressing the evolving landscape of cancer and positions it as a key player in the future of oncological treatments.

Advancements In Genetic Engineering Technologies

Advancements in genetic engineering technologies stand as a cornerstone propelling the Global T-cell Therapy Market to unprecedented heights. The advent of cutting-edge tools, most notably CRISPR-Cas9, has revolutionized the precision and efficiency of genetic modifications, playing a pivotal role in the development and optimization of T-cell therapies. The ability to precisely edit the genome of T cells has significantly enhanced the therapeutic potential of Chimeric Antigen Receptor T-cell (CAR-T) therapy, a prominent player in the T-cell therapy market. CRISPR-Cas9 technology allows researchers and clinicians to make targeted and specific alterations to the genetic code of T cells, ensuring the accurate integration of chimeric antigen receptors (CARs) that enable T cells to recognize and attack cancer cells. This level of precision not only enhances the efficacy of T-cell therapies but also mitigates the risk of off-target effects, addressing a critical concern in the development of advanced cell-based therapies. Moreover, advancements in genetic engineering have facilitated the exploration of next-generation T-cell therapies with improved safety profiles and expanded functionalities. Researchers are actively leveraging these technologies to engineer T cells with enhanced persistence, allowing them to persist in the body for extended periods, which is crucial for sustained anti-cancer activity. Additionally, the ability to precisely manipulate the expression of multiple genes within T cells has opened avenues for developing therapies with enhanced specificity, reducing the likelihood of adverse events. The integration of genetic engineering advancements into the T-cell therapy landscape has also expedited the development process, from preclinical studies to clinical trials and eventual commercialization. The streamlined and efficient modification of T cells has accelerated the translation of innovative therapies from laboratory settings to real-world applications. This accelerated pace is significant in the context of cancer treatment, where timely interventions can make a crucial difference in patient outcomes.

Rising Success In Hematological Cancers

The rising success in hematological cancers is a driving force behind the remarkable growth of the Global T-cell Therapy Market. Hematological malignancies, including leukemia and lymphoma, have emerged as pivotal battlegrounds where T-cell therapies, particularly Chimeric Antigen Receptor T-cell (CAR-T) therapies, have demonstrated unprecedented efficacy. The success stories of CAR-T therapies, such as Kymriah and Yescarta, have not only provided life-saving options for patients with limited treatment alternatives but have also fueled increased confidence and investment in the broader field of T-cell therapy. CAR-T therapies involve the genetic modification of a patient's T cells to express chimeric antigen receptors, enabling them to recognize

and target cancer cells with precision. The remarkable outcomes observed in hematological cancers, characterized by durable remissions and in some cases, complete eradication of cancer cells, have positioned T-cell therapy as a transformative approach in the oncology landscape. The regulatory approvals and commercial successes of CAR-T therapies have accelerated their adoption in clinical practice, further boosting the Global T-cell Therapy Market. The success in hematological cancers has not only established T-cell therapies as a standard of care in certain cases but has also instigated a paradigm shift in cancer treatment approaches. Patients who were once faced with limited options and poor prognoses now have access to innovative therapies that harness the body's immune system to combat cancer. The positive clinical outcomes and the potential for long-term disease control seen in hematological cancers have spurred efforts to apply similar strategies to solid tumors, broadening the scope and impact of T-cell therapies.

Furthermore, the success in hematological cancers has prompted ongoing research and development to refine and expand T-cell therapy applications. Scientists and clinicians are exploring ways to enhance the persistence and durability of T-cell responses, addressing challenges such as tumor relapse and resistance. Additionally, efforts are underway to optimize the manufacturing processes of T-cell therapies, making them more scalable and cost-effective.

Key Market Challenges

High Cost Associated with These Innovative Treatments

The high cost associated with innovative T-cell therapies stands as a formidable barrier hindering the widespread adoption and accessibility of these groundbreaking treatments within the Global T-cell Therapy Market. T-cell therapies, particularly Chimeric Antigen Receptor T-cell (CAR-T) therapies, represent a paradigm shift in cancer treatment by leveraging the patient's immune system to target and destroy cancer cells. However, the complexity of these therapies, involving the collection of patient cells, genetic modification, and personalized manufacturing processes, contributes significantly to the elevated costs. The personalized nature of T-cell therapies is a key factor driving their expense. Each treatment is uniquely tailored to the individual patient, requiring the extraction of their own T cells, which are then genetically modified to express chimeric antigen receptors (CARs) specific to their cancer. This intricate process demands specialized facilities, skilled personnel, and advanced technologies, all of which contribute to the overall cost of production. The necessity for individualized treatments contrasts sharply with conventional, more mass-produced pharmaceuticals, amplifying

the financial burden. Moreover, the research and development involved in pioneering T-cell therapies incur substantial costs. From conducting preclinical studies to navigating the complexities of clinical trials, the journey from discovery to commercialization demands significant financial investment. This investment is further compounded by the need for ongoing innovation and optimization to enhance the safety and efficacy of T-cell therapies.

Adverse Events and Side Effects

The Global T-cell Therapy Market, while holding immense promise in the realm of cancer treatment, grapples with a significant hurdle—the potential for adverse events and side effects associated with these innovative therapies. Particularly notable in Chimeric Antigen Receptor T-cell (CAR-T) therapies, these side effects, such as Cytokine Release Syndrome (CRS) and neurotoxicity, have become a focal point of concern, impacting the broader adoption and acceptance of T-cell therapies. CRS, a systemic inflammatory response triggered by the activation of T cells, is a well-documented side effect of CAR-T therapies. While often manageable, CRS can manifest with flu-like symptoms, high fever, and, in severe cases, lead to organ dysfunction. The varying severity of CRS reactions underscores the need for specialized medical expertise in the administration and management of T-cell therapies. The potential for unpredictable CRS events necessitates careful monitoring and immediate intervention to mitigate adverse outcomes. Neurotoxicity is another side effect that adds complexity to the safety profile of T-cell therapies. Patients may experience neurological symptoms such as confusion, delirium, and seizures, requiring swift and targeted medical attention. The mechanisms underlying neurotoxicity are not fully understood, highlighting the intricacies of T-cell interactions within the central nervous system and the challenges in predicting and managing these events. The occurrence of adverse events, while a natural consequence of activating the immune system to target cancer cells, raises considerations regarding the overall safety and tolerability of T-cell therapies. As these therapies progress from clinical trials to broader clinical use, it becomes essential to establish standardized protocols for monitoring and managing side effects. Moreover, the potential for severe reactions emphasizes the importance of selecting appropriate patient populations and developing risk stratification strategies to ensure the safety of individuals undergoing T-cell therapy.

Key Market Trends

Rise In Focus in Car-T Cell Therapies

The rise in focus on Chimeric Antigen Receptor T-cell (CAR-T) therapies is a pivotal driver propelling the Global T-cell Therapy Market to new heights. CAR-T therapies represent a groundbreaking approach in cancer treatment, harnessing the power of a patient's own immune cells to target and destroy cancer cells with remarkable precision. This therapeutic strategy involves the genetic modification of T cells, endowing them with chimeric antigen receptors that enable recognition and binding to specific cancer cell antigens. The success stories of CAR-T therapies, such as Kymriah and Yescarta, particularly in treating hematological malignancies like leukemia and lymphoma, have catapulted these treatments into the spotlight. Pharmaceutical companies, research institutions, and biotechnology firms are increasingly focusing their efforts and resources on the development and optimization of CAR-T therapies. The surge in clinical trials and research initiatives reflects a commitment to expanding the therapeutic applications of CAR-T cell therapies beyond their initial success in hematological cancers. The depth of ongoing research aims to address challenges, including managing side effects like Cytokine Release Syndrome (CRS) and neurotoxicity, enhancing the persistence of CAR-T cells, and broadening the scope of these therapies to include solid tumors. The concentration of attention on CAR-T therapies has led to significant advancements in the understanding of immune cell interactions and the optimization of CAR-T cell design. Researchers are exploring novel approaches such as dual-target CARs, armored CARs, and switchable CARs to further improve the efficacy and safety profile of these therapies. The increasing focus on CAR-T therapies is not only fueling innovation but also fostering strategic collaborations and partnerships within the industry. These collaborations aim to leverage diverse expertise, accelerate the development process, and navigate the complex landscape of regulatory approvals.

Patient Demand for Personalized Therapies

The Global T-cell Therapy Market is experiencing a notable boost propelled by an increasing demand for personalized therapies, driven by patients seeking more targeted and effective treatment options. T-cell therapies, particularly Chimeric Antigen Receptor T-cell (CAR-T) therapies, epitomize the personalized medicine paradigm by tailoring treatments to the unique genetic and molecular characteristics of individual patients. This customization addresses the inherent heterogeneity of cancer and enhances the precision and efficacy of therapeutic interventions. Patients, now more than ever, are advocating for and embracing personalized approaches that offer a higher likelihood of positive outcomes while minimizing adverse effects associated with traditional, one-size-fits-all treatments. The demand for personalized therapies is underscored by a growing awareness among patients about the potential of T-cell therapies to provide transformative results. The success stories of CAR-T therapies in treating hematological

malignancies, such as leukemia and lymphoma, have garnered significant attention and instilled confidence in the personalized medicine approach. Patients are increasingly seeking access to T-cell therapies as a viable and promising option, especially when standard treatments have proven inadequate or are associated with significant side effects. The surge in patient demand aligns with the broader trend in healthcare towards individualized and targeted treatments. Patients are now more informed and proactive in their healthcare decisions, advocating for treatments that align with their specific genetic and molecular profiles. The recognition of T-cell therapies as a beacon of hope, particularly in cases where conventional treatments have fallen short, is driving patients to explore and pursue these innovative and personalized therapeutic options. Furthermore, the rise of patient advocacy groups and online communities has empowered individuals to access information, share experiences, and actively participate in discussions about emerging treatment modalities. This collective empowerment has contributed to a heightened awareness of T-cell therapies and their potential benefits, further fueling the demand for personalized cancer treatments.

Segmental Insights

Therapy Type Insights

Based on the Therapy Type, CAR T-cell therapy emerged as the dominant segment in the global market for Global Hematology T-cell Therapy in 2023. CAR T-cell therapies, such as Kymriah and Yescarta, have demonstrated remarkable success in treating certain types of blood cancers, particularly relapsed or refractory B-cell malignancies like leukemia and lymphoma. The clinical success of CAR T-cell therapies has led to regulatory approvals by health authorities, including the U.S. Food and Drug Administration (FDA) and the European Medicines Agency (EMA). These approvals have played a crucial role in establishing CAR T-cell therapy as a standard of care for specific indications, creating a strong demand in the market. CAR T-cell therapies have shown effectiveness across a broader spectrum of cancers compared to TCR-based and TIL-based therapies.

Indication Insights

Based on the Indication, hematologic malignancies emerged as the dominant segment in the global market for Global T-cell Therapy Market in 2023. CAR T-cell therapies, such as Kymriah and Yescarta, have demonstrated remarkable success in the treatment of hematologic malignancies, especially B-cell cancers. Patients with relapsed or refractory forms of leukemia and lymphoma who had limited treatment options have

experienced significant clinical responses, leading to remissions and improved survival rates. The success in hematologic malignancies has established CAR T-cell therapy as a transformative approach in this specific patient population. The design of CAR T-cell therapies often involves targeting specific surface antigens present on hematologic cancer cells.

Regional Insights

North America emerged as the dominant player in the Global T-cell Therapy Market in 2023, holding the largest market share. North America, particularly the United States, has been at the forefront of early adoption and regulatory approvals for T-cell therapies. The U.S. Food and Drug Administration (FDA) has played a pivotal role in expediting the approval process for innovative therapies, including Chimeric Antigen Receptor T-cell (CAR-T) therapies. The regulatory support and efficient approval processes have allowed T-cell therapies to reach the market more rapidly, contributing to North America's leadership. The region boasts a robust and well-established research and development infrastructure, with leading academic institutions, pharmaceutical companies, and biotechnology firms actively engaged in advancing T-cell therapy research. The collaboration between these entities has facilitated breakthroughs, driving innovation and the development of novel T-cell therapies.

Key Market Players

Novartis AG

Merck KGaA

Gilead Sciences Inc.

TCR2 Therapeutics Inc

Bluebird Bio Inc.

Sorrento Therapeutics Inc.

Fate Therapeutics Inc.

Pfizer Inc.

Amgen Inc

Celgene Corporation

Report Scope:

In this report, the Global T-cell Therapy Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Global T-cell Therapy Market,By Therapy Type:

- oCAR T-cell Therapy

- oT Cell Receptor (TCR)-based

- oTumor Infiltrating Lymphocytes (TIL)-based

·Global T-cell Therapy Market,By Indication:

- oHematologic Malignancies

- oSolid Tumors

- oOthers

Global T-cell Therapy Market, By Region:

- oNorth America

 - United States

 - Canada

 - Mexico

- oEurope

 - France

United Kingdom

Italy

Germany

Spain

oAsia-Pacific

China

India

Japan

Australia

South Korea

oSouth America

Brazil

Argentina

Colombia

oMiddle East Africa

South Africa

Saudi Arabia

UAE

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global T-cell Therapy Market.

Available Customizations:

Global T-cell Therapy Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1.PRODUCT OVERVIEW

- 1.1.Market Definition
- 1.2.Scope of the Market
 - 1.2.1.Markets Covered
 - 1.2.2.Years Considered for Study
 - 1.2.3.Key Market Segmentations

2.RESEARCH METHODOLOGY

- 2.1.Objective of the Study
- 2.2.Baseline Methodology
- 2.3.Key Industry Partners
- 2.4.Major Association and Secondary Sources
- 2.5.Forecasting Methodology
- 2.6.Data Triangulation Validation
- 2.7.Assumptions and Limitations

3.EXECUTIVE SUMMARY

- 3.1.Overview of the Market
- 3.2.Overview of Key Market Segmentations
- 3.3.Overview of Key Market Players
- 3.4.Overview of Key Regions/Countries
- 3.5.Overview of Market Drivers, Challenges, Trends

4.GLOBAL T-CELL THERAPY MARKET OUTLOOK

- 4.1.Market Size Forecast
 - 4.1.1.By Value
- 4.2.Market Share Forecast
 - 4.2.1.By Therapy Type (CAR T-cell Therapy, T Cell Receptor (TCR)-based, Tumor Infiltrating Lymphocytes (TIL)-based))
 - 4.2.2.By Indication (Hematologic Malignancies,Solid Tumors, Others)
 - 4.2.3.By Region
 - 4.2.4.By Company (2023)
- 4.3.Market Map

- 4.3.1.By Therapy Type
- 4.3.2.By Indication
- 4.3.3.By Region

5.ASIA PACIFIC T-CELL THERAPY MARKET OUTLOOK

- 5.1.Market Size Forecast
 - 5.1.1.By Value
- 5.2.Market Share Forecast
 - 5.2.1.By Therapy Type
 - 5.2.2.By Indication
 - 5.2.3.By Country
- 5.3.Asia Pacific: Country Analysis
 - 5.3.1.China T-cell Therapy Market Outlook
 - 5.3.1.1.Market Size Forecast
 - 5.3.1.1.1.By Value
 - 5.3.1.2.Market Share Forecast
 - 5.3.1.2.1.By Therapy Type
 - 5.3.1.2.2.By Indication
 - 5.3.2.India T-cell Therapy Market Outlook
 - 5.3.2.1.Market Size Forecast
 - 5.3.2.1.1.By Value
 - 5.3.2.2.Market Share Forecast
 - 5.3.2.2.1.By Therapy Type
 - 5.3.2.2.2.By Indication
 - 5.3.3.Australia T-cell Therapy Market Outlook
 - 5.3.3.1.Market Size Forecast
 - 5.3.3.1.1.By Value
 - 5.3.3.2.Market Share Forecast
 - 5.3.3.2.1.By Therapy Type
 - 5.3.3.2.2.By Indication
 - 5.3.4.Japan T-cell Therapy Market Outlook
 - 5.3.4.1.Market Size Forecast
 - 5.3.4.1.1.By Value
 - 5.3.4.2.Market Share Forecast
 - 5.3.4.2.1.By Therapy Type
 - 5.3.4.2.2.By Indication
 - 5.3.5.South Korea T-cell Therapy Market Outlook
 - 5.3.5.1.Market Size Forecast

- 5.3.5.1.1.By Value
- 5.3.5.2.Market Share Forecast
 - 5.3.5.2.1.By Therapy Type
 - 5.3.5.2.2.By Indication

6.EUROPE T-CELL THERAPY MARKET OUTLOOK

- 6.1.Market Size Forecast
 - 6.1.1.By Value
- 6.2.Market Share Forecast
 - 6.2.1.By Therapy Type
 - 6.2.2.By Indication
 - 6.2.3.By Country
- 6.3.Europe: Country Analysis
 - 6.3.1.France T-cell Therapy Market Outlook
 - 6.3.1.1.Market Size Forecast
 - 6.3.1.1.1.By Value
 - 6.3.1.2.Market Share Forecast
 - 6.3.1.2.1.By Therapy Type
 - 6.3.1.2.2.By Indication
 - 6.3.2.Germany T-cell Therapy Market Outlook
 - 6.3.2.1.Market Size Forecast
 - 6.3.2.1.1.By Value
 - 6.3.2.2.Market Share Forecast
 - 6.3.2.2.1.By Therapy Type
 - 6.3.2.2.2.By Indication
 - 6.3.3.Spain T-cell Therapy Market Outlook
 - 6.3.3.1.Market Size Forecast
 - 6.3.3.1.1.By Value
 - 6.3.3.2.Market Share Forecast
 - 6.3.3.2.1.By Therapy Type
 - 6.3.3.2.2.By Indication
 - 6.3.4.Italy T-cell Therapy Market Outlook
 - 6.3.4.1.Market Size Forecast
 - 6.3.4.1.1.By Value
 - 6.3.4.2.Market Share Forecast
 - 6.3.4.2.1.By Therapy Type
 - 6.3.4.2.2.By Indication
 - 6.3.5.United Kingdom T-cell Therapy Market Outlook

- 6.3.5.1.Market Size Forecast
 - 6.3.5.1.1.By Value
- 6.3.5.2.Market Share Forecast
 - 6.3.5.2.1.By Therapy Type
 - 6.3.5.2.2.By Indication

7.NORTH AMERICA T-CELL THERAPY MARKET OUTLOOK

- 7.1.Market Size Forecast
 - 7.1.1.By Value
- 7.2.Market Share Forecast
 - 7.2.1.By Therapy Type
 - 7.2.2.By Indication
 - 7.2.3.By Country
- 7.3.North America: Country Analysis
 - 7.3.1.United States T-cell Therapy Market Outlook
 - 7.3.1.1.Market Size Forecast
 - 7.3.1.1.1.By Value
 - 7.3.1.2.Market Share Forecast
 - 7.3.1.2.1.By Therapy Type
 - 7.3.1.2.2.By Indication
 - 7.3.2.Mexico T-cell Therapy Market Outlook
 - 7.3.2.1.Market Size Forecast
 - 7.3.2.1.1.By Value
 - 7.3.2.2.Market Share Forecast
 - 7.3.2.2.1.By Therapy Type
 - 7.3.2.2.2.By Indication
 - 7.3.3.Canada T-cell Therapy Market Outlook
 - 7.3.3.1.Market Size Forecast
 - 7.3.3.1.1.By Value
 - 7.3.3.2.Market Share Forecast
 - 7.3.3.2.1.By Therapy Type
 - 7.3.3.2.2.By Indication

8.SOUTH AMERICA T-CELL THERAPY MARKET OUTLOOK

- 8.1.Market Size Forecast
 - 8.1.1.By Value
- 8.2.Market Share Forecast

- 8.2.1.By Therapy Type
- 8.2.2.By Indication
- 8.2.3.By Country
- 8.3.South America: Country Analysis
 - 8.3.1.Brazil T-cell Therapy Market Outlook
 - 8.3.1.1.Market Size Forecast
 - 8.3.1.1.1.By Value
 - 8.3.1.2.Market Share Forecast
 - 8.3.1.2.1.By Therapy Type
 - 8.3.1.2.2.By Indication
 - 8.3.2.Argentina T-cell Therapy Market Outlook
 - 8.3.2.1.Market Size Forecast
 - 8.3.2.1.1.By Value
 - 8.3.2.2.Market Share Forecast
 - 8.3.2.2.1.By Therapy Type
 - 8.3.2.2.2.By Indication
 - 8.3.3.Colombia T-cell Therapy Market Outlook
 - 8.3.3.1.Market Size Forecast
 - 8.3.3.1.1.By Value
 - 8.3.3.2.Market Share Forecast
 - 8.3.3.2.1.By Therapy Type
 - 8.3.3.2.2.By Indication

9.MIDDLE EAST AND AFRICA T-CELL THERAPY MARKET OUTLOOK

- 9.1.Market Size Forecast
 - 9.1.1.By Value
- 9.2.Market Share Forecast
 - 9.2.1.By Therapy Type
 - 9.2.2.By Indication
 - 9.2.3.By Country
- 9.3.MEA: Country Analysis
 - 9.3.1.South Africa T-cell Therapy Market Outlook
 - 9.3.1.1.Market Size Forecast
 - 9.3.1.1.1.By Value
 - 9.3.1.2.Market Share Forecast
 - 9.3.1.2.1.By Therapy Type
 - 9.3.1.2.2.By Indication
 - 9.3.2.Saudi Arabia T-cell Therapy Market Outlook

- 9.3.2.1.Market Size Forecast
 - 9.3.2.1.1.By Value
- 9.3.2.2.Market Share Forecast
 - 9.3.2.2.1.By Therapy Type
 - 9.3.2.2.2.By Indication
- 9.3.3.UAE T-cell Therapy Market Outlook
 - 9.3.3.1.Market Size Forecast
 - 9.3.3.1.1.By Value
 - 9.3.3.2.Market Share Forecast
 - 9.3.3.2.1.By Therapy Type
 - 9.3.3.2.2.By Indication
- 9.3.4.Egypt T-cell Therapy Market Outlook
 - 9.3.4.1.Market Size Forecast
 - 9.3.4.1.1.By Value
 - 9.3.4.2.Market Share Forecast
 - 9.3.4.2.1.By Therapy Type
 - 9.3.4.2.2.By Indication

10.MARKET DYNAMICS

- 10.1.Drivers
- 10.2.Challenges

11.MARKET TRENDS DEVELOPMENTS

- 11.1.Recent Developments
- 11.2.Product Launches
- 11.3.Mergers Acquisitions

12.GLOBAL T-CELL THERAPY MARKET: SWOT ANALYSIS

13.PORTER'S FIVE FORCES ANALYSIS

- 13.1.Competition in the Industry
- 13.2.Potential of New Entrants
- 13.3.Power of Suppliers
- 13.4.Power of Customers
- 13.5.Threat of Substitute Product

14.COMPETITIVE LANDSCAPE

14.1.Novartis AG

14.1.1.Business Overview

14.1.2.Company Snapshot

14.1.3.Products Services

14.1.4.Financials (In case of listed)

14.1.5.Recent Developments

14.1.6.SWOT Analysis

14.2.Merck KGaA

14.3.Gilead Sciences Inc.

14.4.TCR2 Therapeutics Inc

14.5.Bluebird Bio Inc.

14.6.Sorrento Therapeutics Inc.

14.7.Fate Therapeutics Inc.

14.8.Pfizer Inc.

14.9.Amgen Inc.

14.10.Celgene Corporation

15.STRATEGIC RECOMMENDATIONS

16.ABOUT US DISCLAIMER

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