



Induced Pluripotent Stem Cells: Global Markets

Jun 2014 • BIO135A

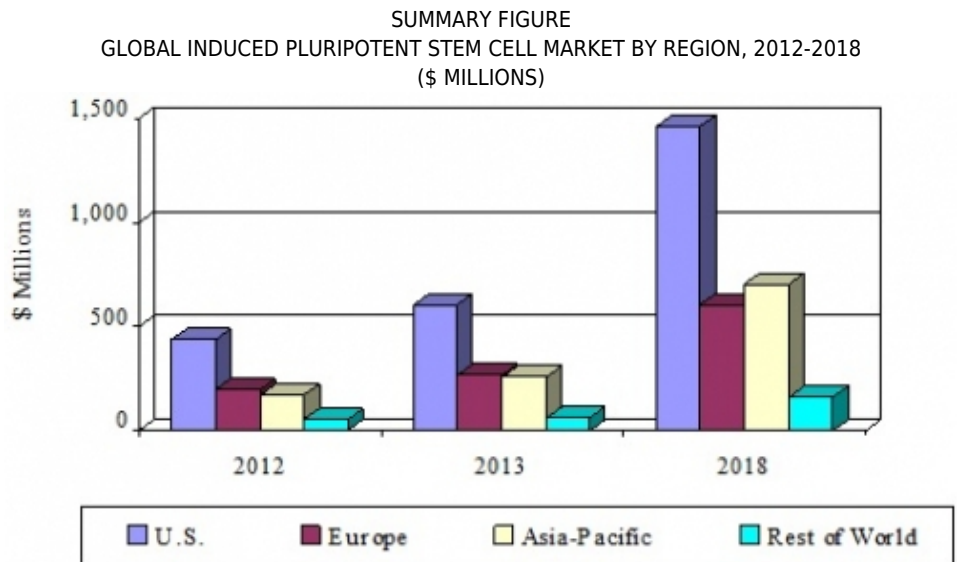
Use this report to:

- Receive comprehensive and up-to-date background on the marketplaces associated with the induced pluripotent stem cells.
- Learn about the various market segments, including product-type-based, product-function-based, application-based, geography-based and technological-method-based.
- Receive research and market trends by analyzing the funding, patent publications and sales trends of major players in the field.
- Receive profiles of leading companies in the industry.



Highlights

- The global market for induced pluripotent stem cells (iPSCs) was estimated to total \$853 million in 2012, and close to \$1.2 billion in 2013, averaging 40% growth. The market is expected to reach \$2.9 billion in 2018, an estimated compound annual growth rate (CAGR) of 19.7% for the five-year period 2013 to 2018.
- The U.S. market was valued at \$605 million in 2013 and is expected to reach nearly \$1.5 billion by 2018, a CAGR of 19.4% from 2013 to 2018.
- The Asia-Pacific market was valued at \$260 million in 2013 and will experience the fastest growth among all regional markets with a five-year CAGR of 22% to reach \$703 million by 2018.



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Source: BCC Research

Introduction & Scope

INTRODUCTION

STUDY GOALS AND OBJECTIVES

The aim of this report is to provide detailed market and industry analyses to help readers quantify and qualify the global market for induced pluripotent stem cells (iPSCs). Important trends of the field and market segments are identified, and market sizes and sales forecasts by segmented markets are provided through 2018.

This report focuses on the market side rather than the technical side. The detailed market segmentation, market shares, major drivers, trend analysis and forecasts for the entire iPSCs market are analyzed.

REASONS FOR DOING THIS STUDY

Detailed market and industry analysis for the iPSCs market is needed. As a breakthrough technology recognized by 2012 Nobel Physiology and Medicine Prize, iPSCs technology may bring a revolutionary change to modern medicine. Great opportunities always exist with high risks, but the detailed analysis and forecasts of the iPSC market can provide useful information for all management levels to help make strategic decisions in related areas.

iPSC-related products are forming an emerging market despite the fact that iPSC clinical applications are still under development. The potential scope of the iPSC market is becoming clear, and it is appropriate to review the emerging market, see the

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current size and share of each segment, evaluate the market trends and look to its future.

INTENDED AUDIENCE

This report is designed to satisfy the information needs of various individuals involved in the biological research, pharmaceutical and regenerative medicine marketplaces, including company senior management executives seeking to base their strategic decisions on the best available information on market forces and trends. It is also aimed at managers and executives in marketing, research, planning and sales departments who need readable, comprehensive and up-to-date background on the marketplaces associated with the induced pluripotent stem cells with which they are operating.

This report was prepared as a study of the global market for induced pluripotent stem cells. Information is presented with a specific focus on the various market segments, including product-type-based, product-function-based, application-based, geography-based and technological-method-based. The detailed segmentation is to provide a deep profiling of the global iPSCs market based on which the market forecasts are made.

This study will be of significant interest to academic institutions, hospitals, biotech and pharmaceutical companies, biopharmaceutical researchers, marketing executives from pharmaceutical and biotech companies, contract research organizations, biologists, chemists, physicians, pharmaceutical directors, product managers and representatives, and all manner of institutional directors from either public or private entities. It will also be of interest to investment bankers in the biotechnology and pharmaceutical sectors, insurance executives and life sciences product marketing managers.

SCOPE OF REPORT

This study is focused on the market side of iPSCs rather than its technical side. Different market segments for this emerging market are covered. For example, application-based market segments include academic research, drug development and toxicity testing, and regenerative medicine; product function-based market segments include molecular and cellular engineering, cellular reprogramming, cell culture, cell differentiation, and cell analysis; iPSC-derived cell-type-based market segments include cardiomyocytes, hepatocytes, neurons, endothelial cells, and other cell types; geography-based market segments include the U.S., Europe, Asia-Pacific and Rest of World. Research and market trends are also analyzed by analyzing the funding, patent publications and sales trends of major players in the field.

METHODOLOGY

Both primary and secondary research methodologies were used to prepare this study. Primary research includes interviews with leading individuals in stem cell companies and industry associations. Primary sources of published data include company annual reports, SEC filings, and government and industry publications. Secondary sources consist of literature searches, industry journals and other commercial publications. Data for market estimates and forecasts are pooled from a range of sources that were critically assessed by BCC Research.

INFORMATION SOURCES

Information sources included marketing strategists, industry executives, academic experts, government agencies and regulatory bodies, and surveys of scientists in both academic and industrial areas. Company annual reports and Securities and Exchange Commission (SEC) filings, journal articles, newsletters, expert blogs, and data from related institutions were also reviewed.

ANALYST CREDENTIALS

Mike Fan has more than 20 years experience in biotech research and development (R&D) and life science marketing from academics and industry. Dr. Fan has a broad

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range of experience in chemical, biochemical and biomedical areas, including biochemical engineering (e.g., microbial fermentation, biocatalysis, metabolic engineering), chemical synthesis, biomedical engineering (e.g., biomedical instrument development, microarray technologies), molecular genetics, genetic analysis, drug discovery, cancer biology, cancer immunology, targeted therapy and stem cell research. He holds a PhD in Chemical Engineering and a Master of Business Administration focusing on Marketing.

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