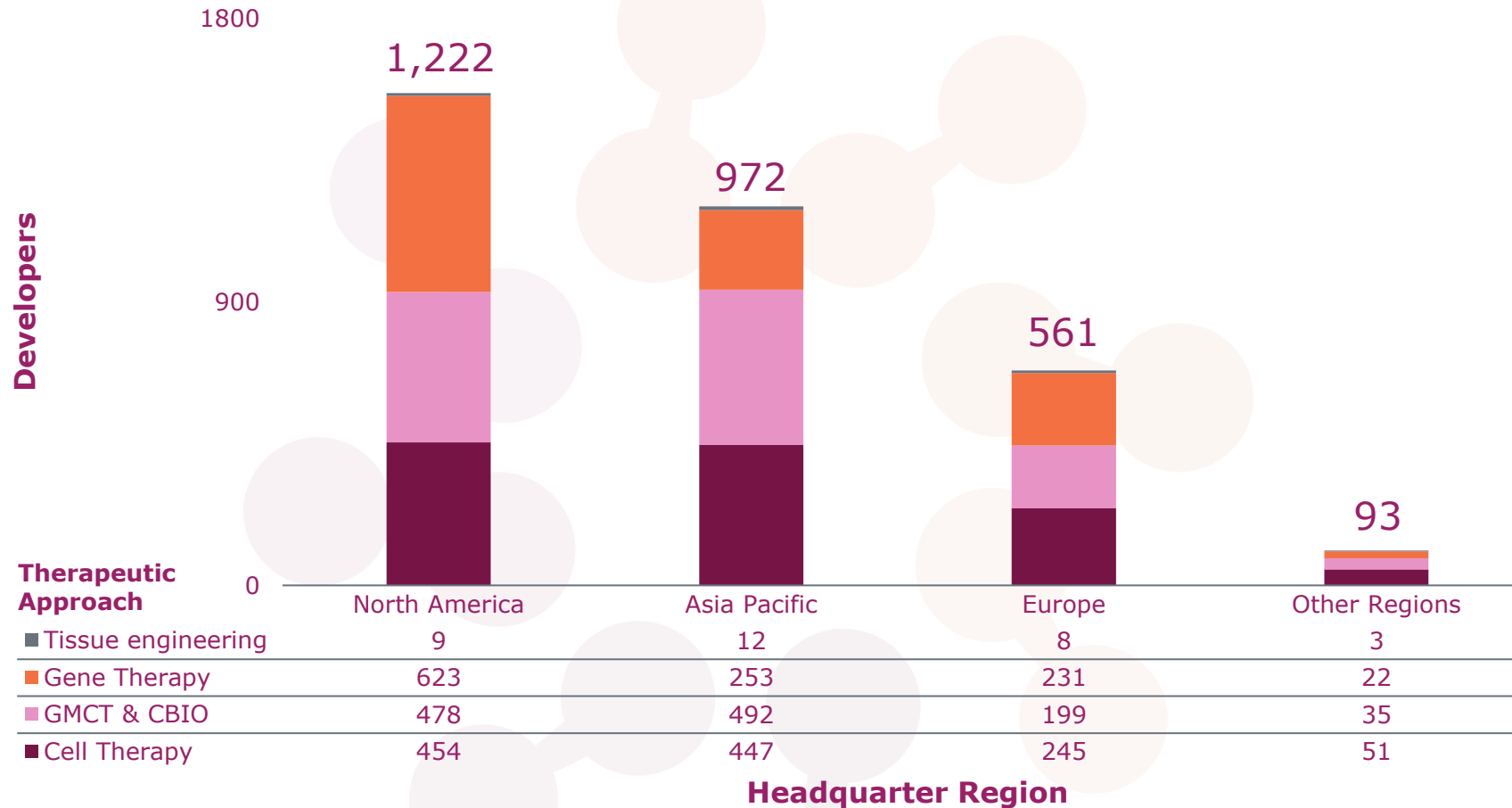


# Developers by Headquarter Region and Therapeutic Approach

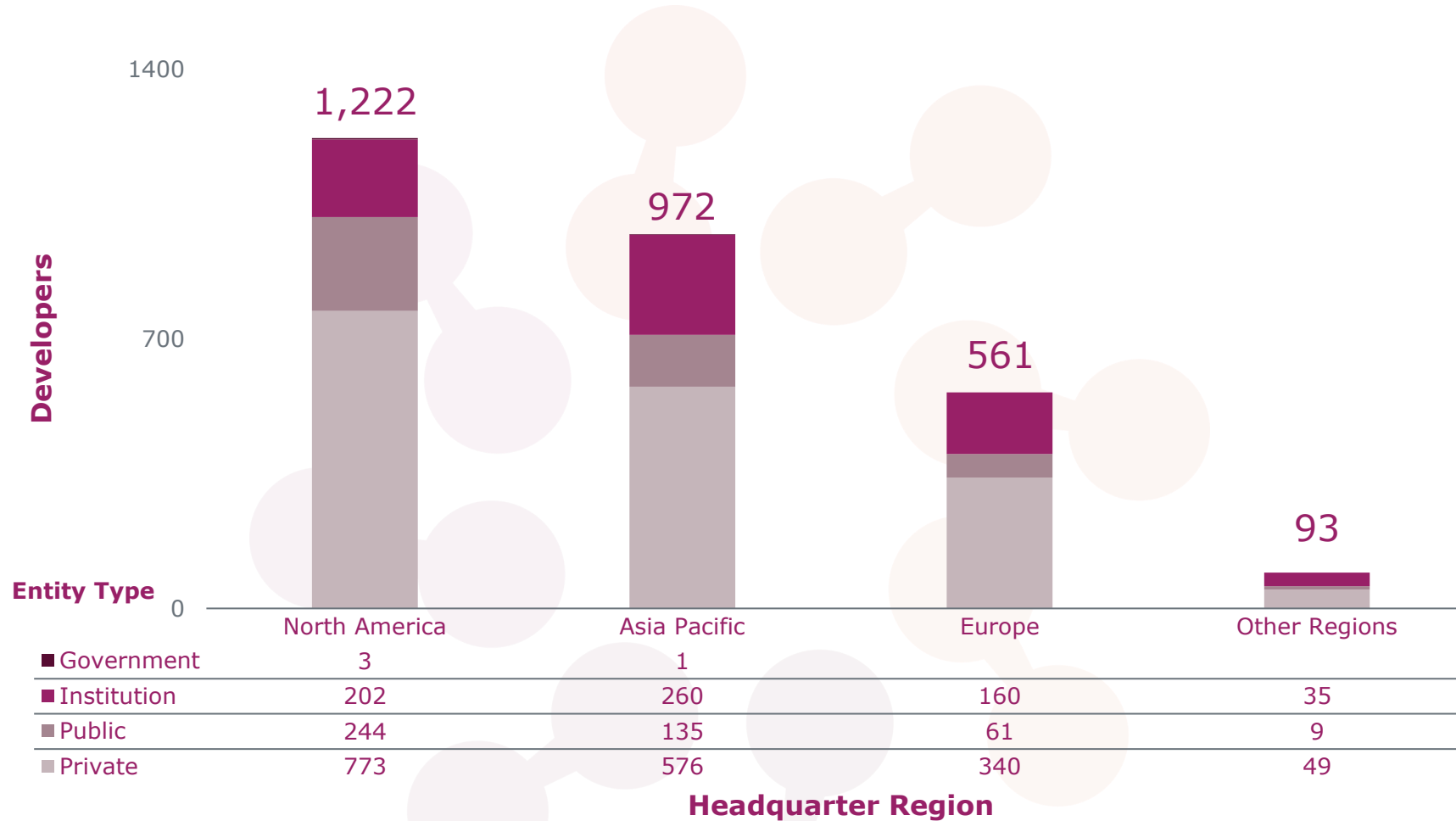


1. Within-graph labels represent headquarter region totals

2. Developers may work across multiple therapeutic approaches; sum of therapeutic approach totals will not be equivalent to regional totals

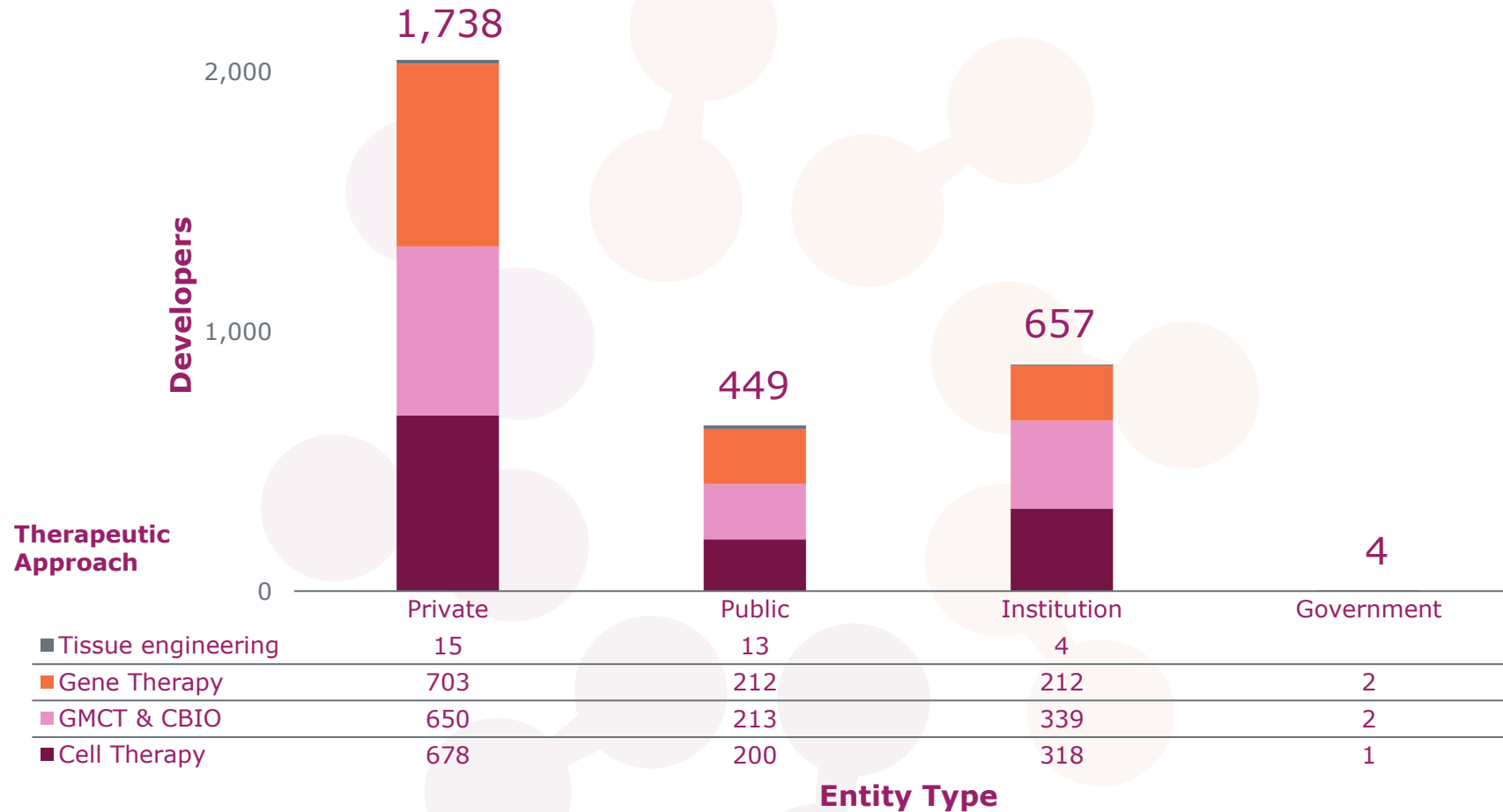
3. Please see "Methodology Notes" for additional details

# Developers by Headquarter Region and Entity Type



1. Within-graph labels represent headquarter region totals  
2. Please see "Methodology Notes" for additional details

# Developers by Entity Type and Therapeutic Approach

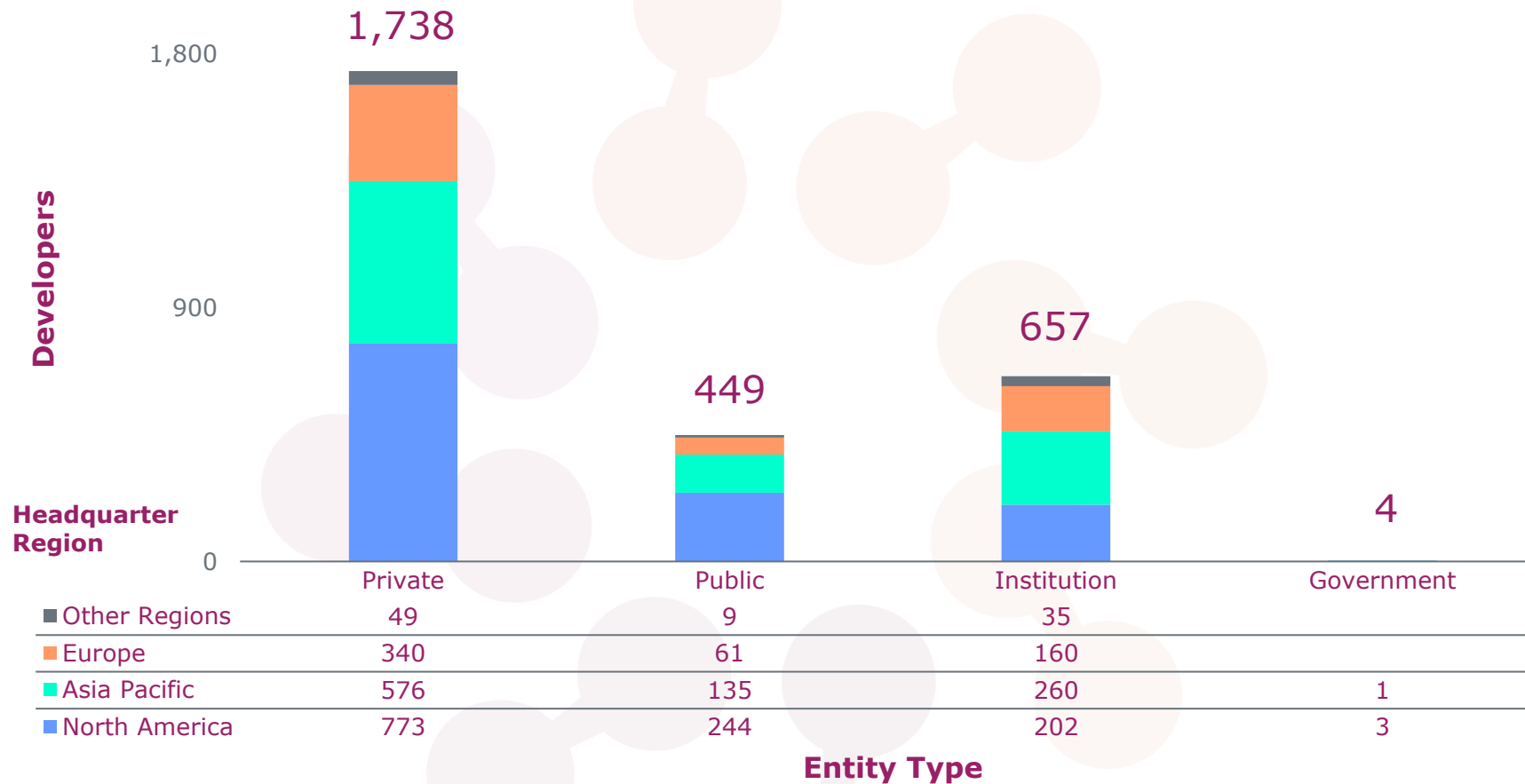


1. Within-graph labels represent entity type totals

2. Developers may work across multiple therapeutic approaches; sum of therapeutic approach totals will not be equivalent to entity type totals

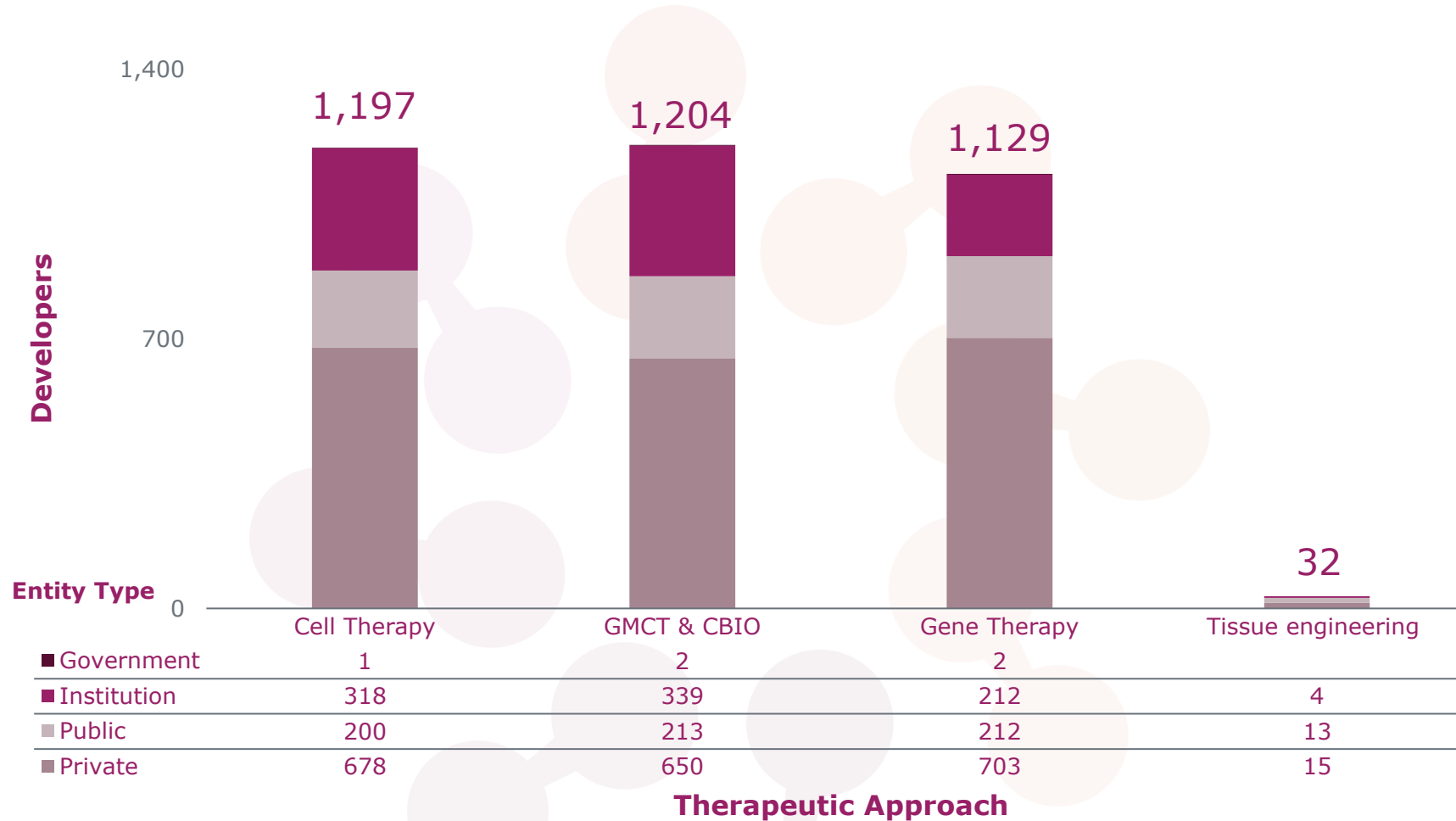
3. Please see "Methodology Notes" for additional details

# Developers by Entity Type and Headquarter Region



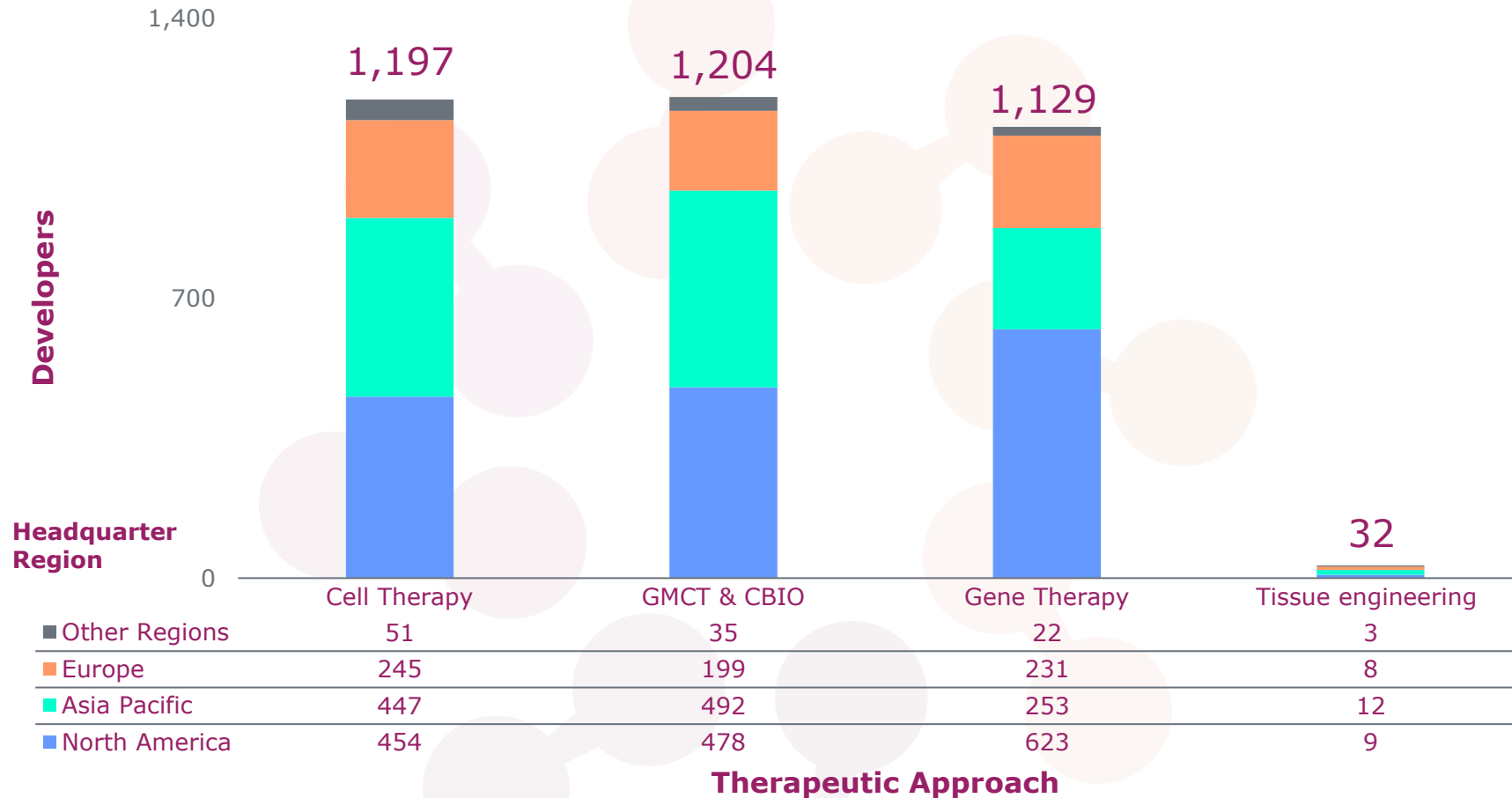
1. Within-graph labels represent entity type totals  
2. Please see "Methodology Notes" for additional details

# Developers by Therapeutic Approach and Entity Type



1. Within-graph labels represent therapeutic approach totals  
 2. Developers may work across multiple therapeutic approaches; sum of therapeutic approach totals will not be equivalent to entity type totals  
 3. Please see "Methodology Notes" for additional details

# Developers by Therapeutic Approach and Headquarter Region



1. Within-graph labels represent therapeutic approach totals  
 2. Developers may work across multiple therapeutic approaches; sum of therapeutic approach totals will not be equivalent to regional totals  
 3. Please see "Methodology Notes" for additional details

# Methodology Notes for Developer Data

## Methodology Notes

1. Developer data represent a snapshot in time; this snapshot was taken in April 2024.
2. \*Developer data consist of the primary owners of a therapeutic drug or platform considered to be part of the durable regenerative medicine sector by ARM. This includes cell, gene, gene-modified cell (GMCT), and tissue engineering therapies.
  - 2a. As durability is a key scoping factor, ARM typically excludes non-durable treatments where possible (antisense-based gene therapies, vaccines). Notable exceptions: Krystal Bio's topical cream, Vyjuvek.
  - 2b. In other reports, ARM typically allocates GMCTs to gene therapy or cell-based immunoncology (CBIO), based on indication. As indication is not present in this dataset, that allocation is not possible here.
3. \*Developer headquarter regions are based on the location of the parent headquarters of a company, whenever known, at the highest definition of 'Parent Company' available. For single-entity and/or single-location developers, the company is considered its own parent.
4. Therapeutic developers may have multiple therapeutic approaches in their pipeline and/or portfolio; the sum of therapeutic approach totals may not be equivalent to developer totals.

\* Updated in 2023