Developers by Headquarter Region and Therapeutic Approach

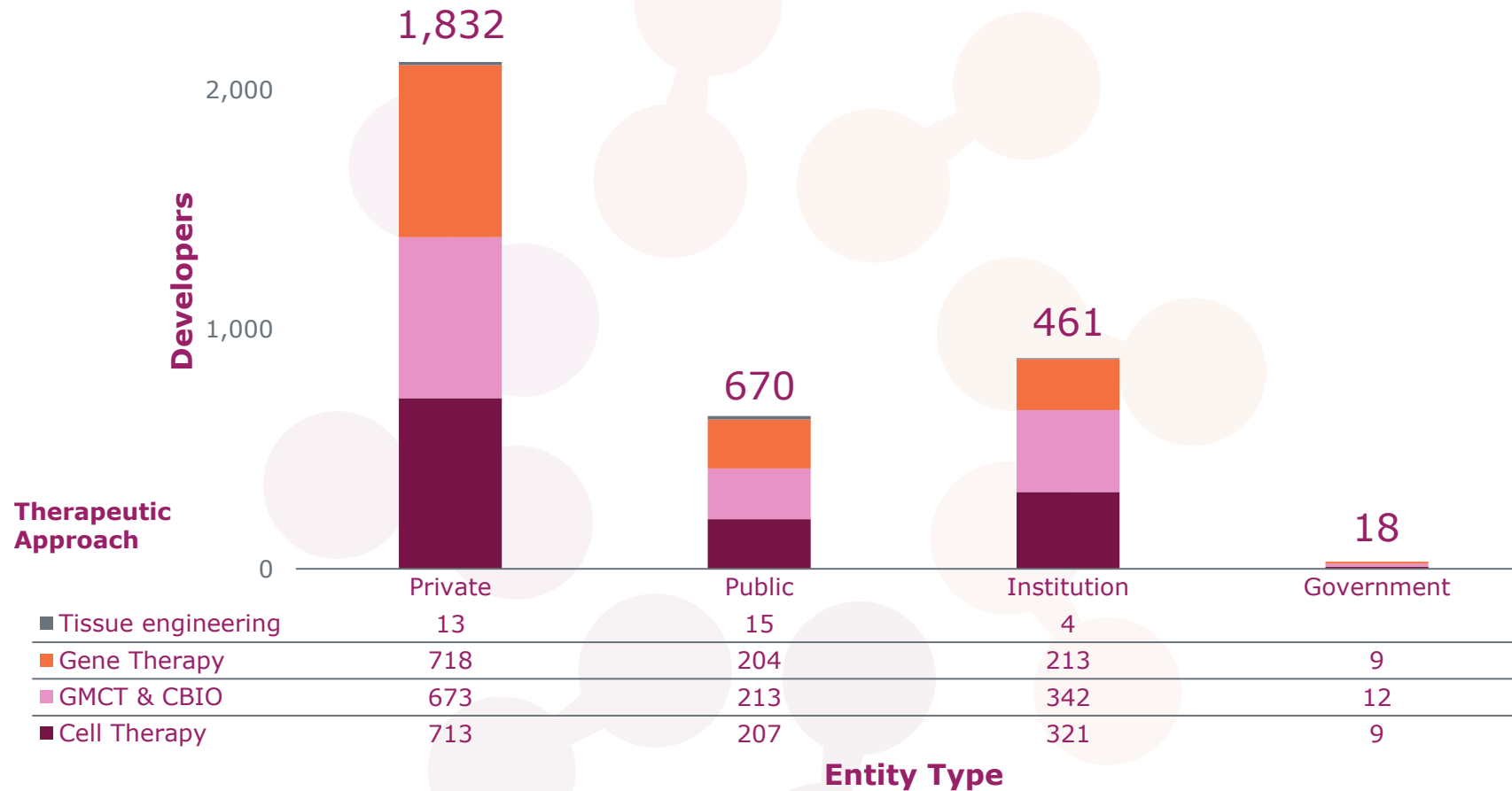| Therapeutic Approach	North America	Asia Pacific	Europe	Other Regions
■ Tissue engineering	8	13	8	3
■ Gene Therapy	635	256	230	23
■ GMCT & CBIO	478	517	208	37
■ Cell Therapy	467	484	249	50
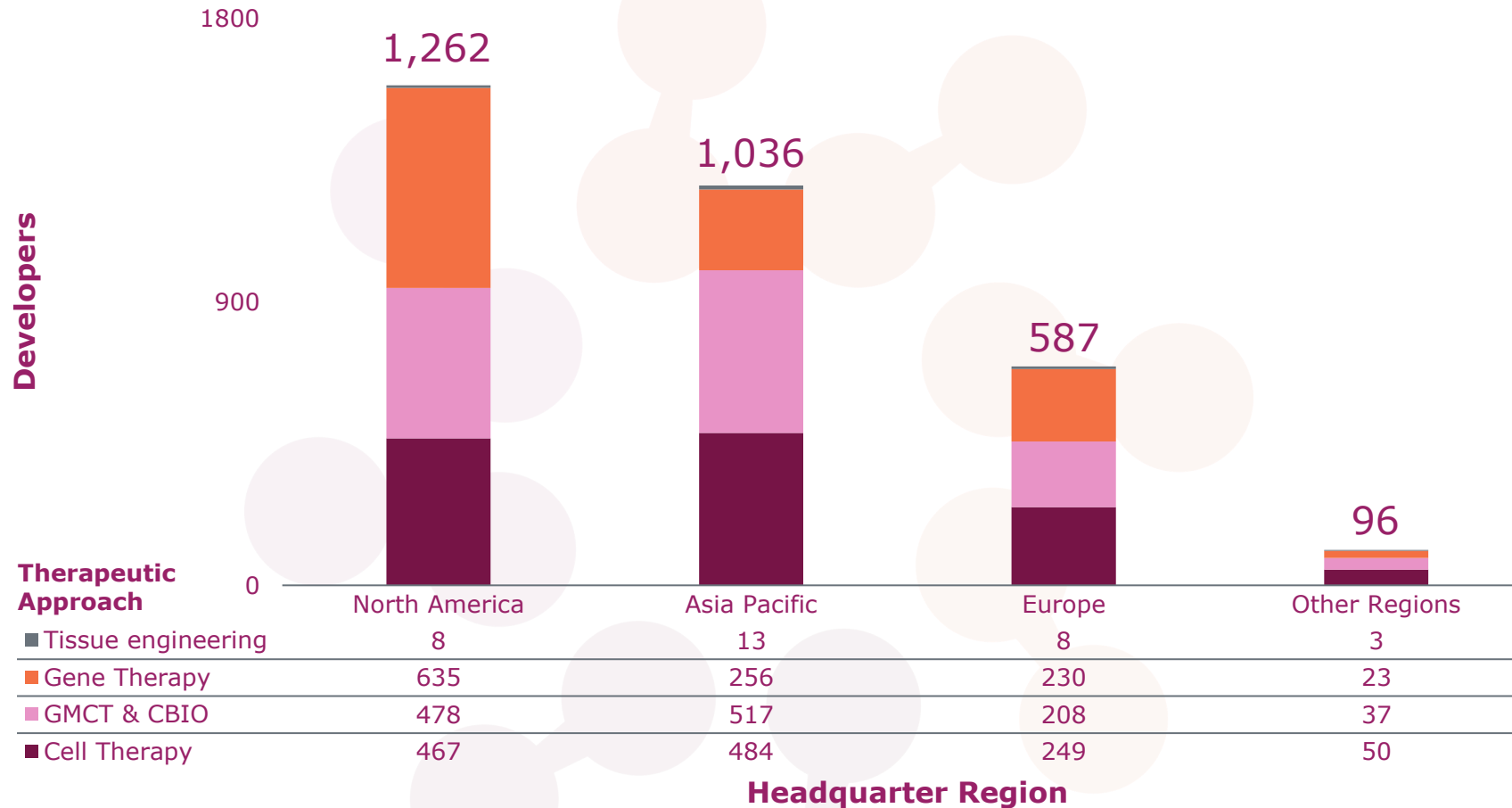
1. Within-graph labels represent headquarter region totals
2. Developers may work across multiple therapeutic approaches; sum of therapeutic approach totals will not be equivalent to regional totals
3. Please see "Methodology Notes" for additional details

Developers by Headquarter Region and Entity Type

Entity Type	North America	Asia Pacific	Europe	Other Regions
■ Government	12	6		
■ Institution	202	267	165	36
■ Public	241	149	62	9
■ Private	807	614	360	51
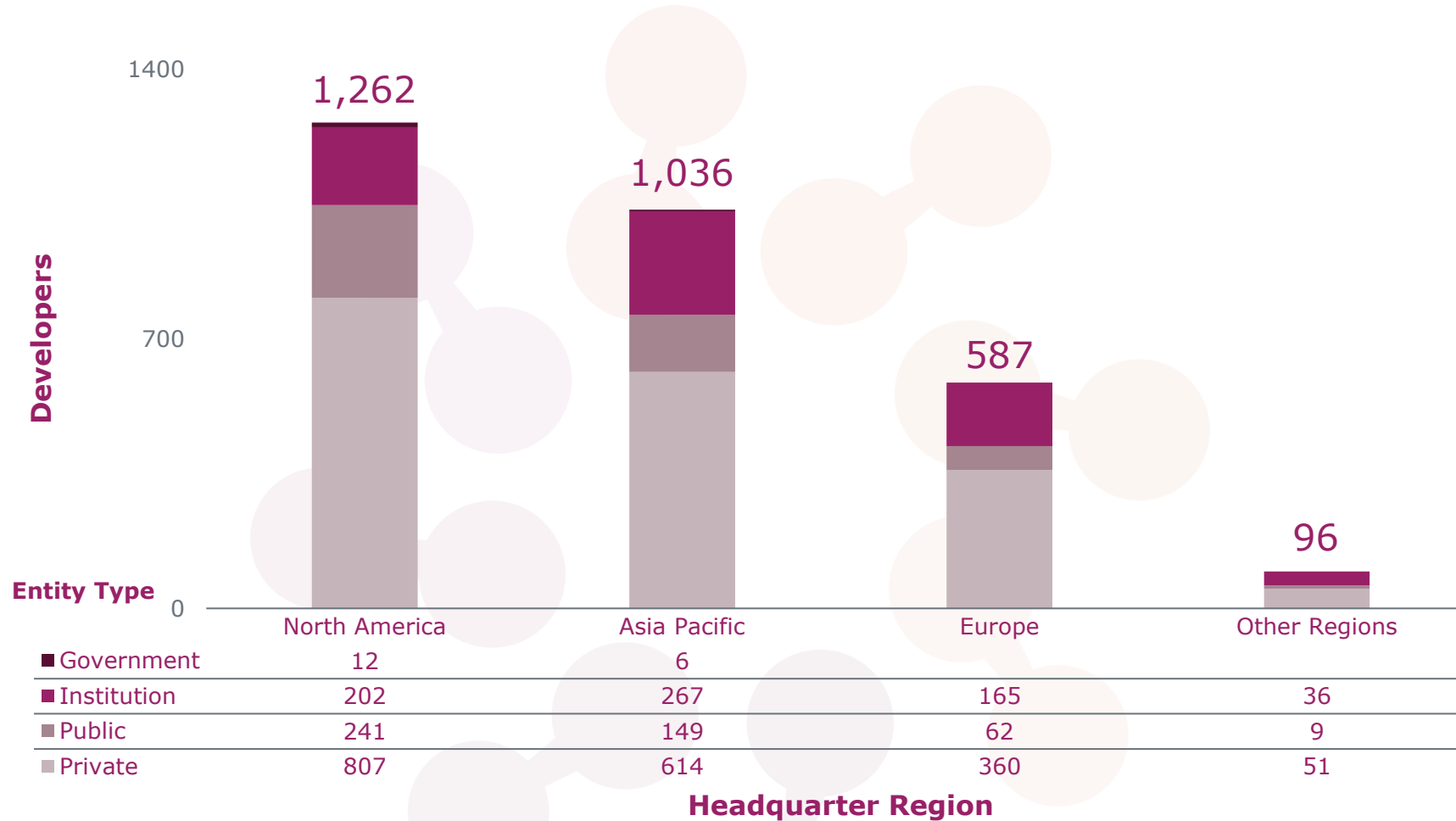
1. Within-graph labels represent headquarter region totals
2. Please see "Methodology Notes" for additional details

Developers by Entity Type and Therapeutic Approach

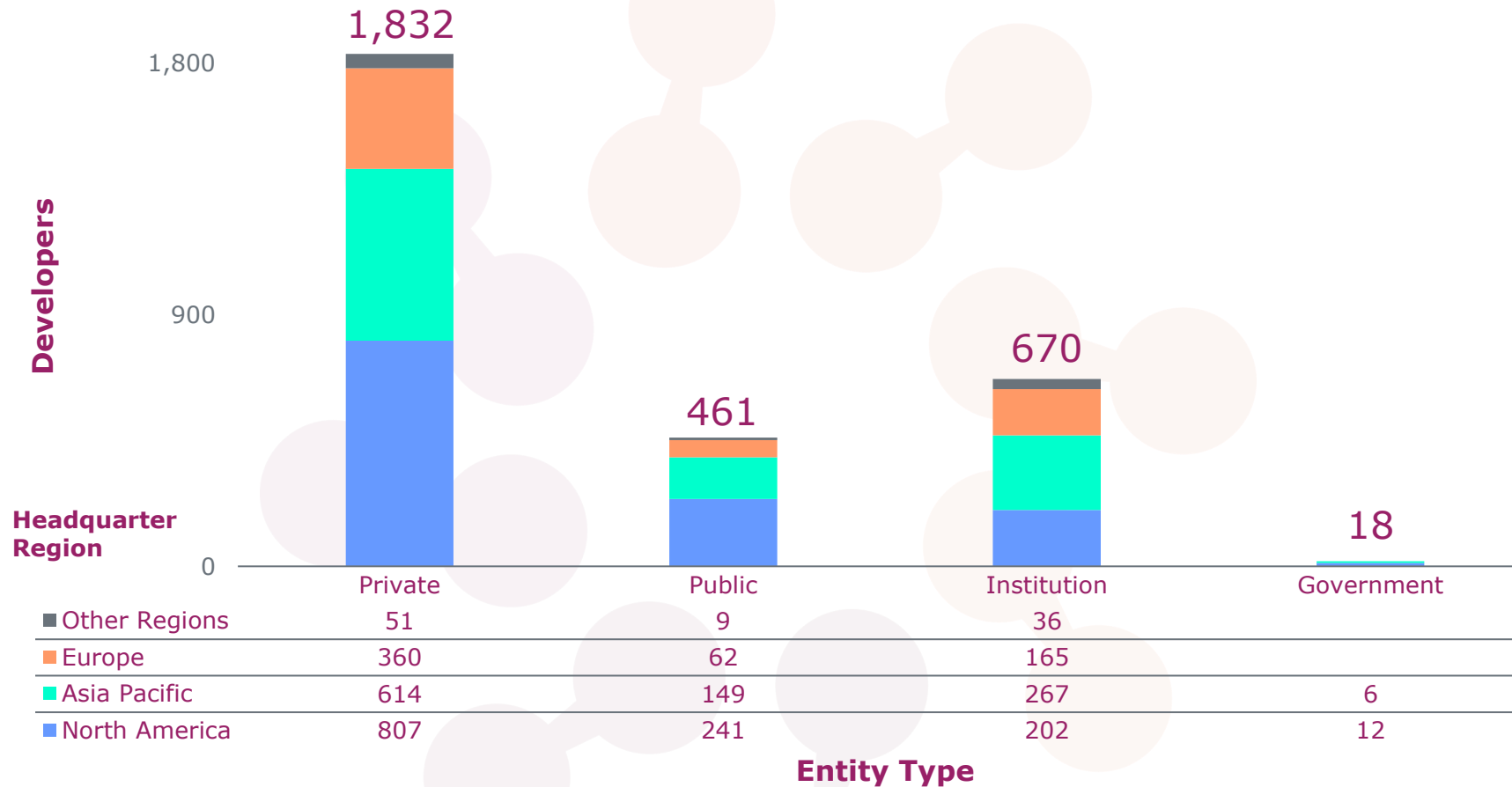| Therapeutic Approach	Private	Public	Institution	Government
■ Tissue engineering	13	15	4	
■ Gene Therapy	718	204	213	9
■ GMCT & CBIO	673	213	342	12
■ Cell Therapy	713	207	321	9

Entity Type

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
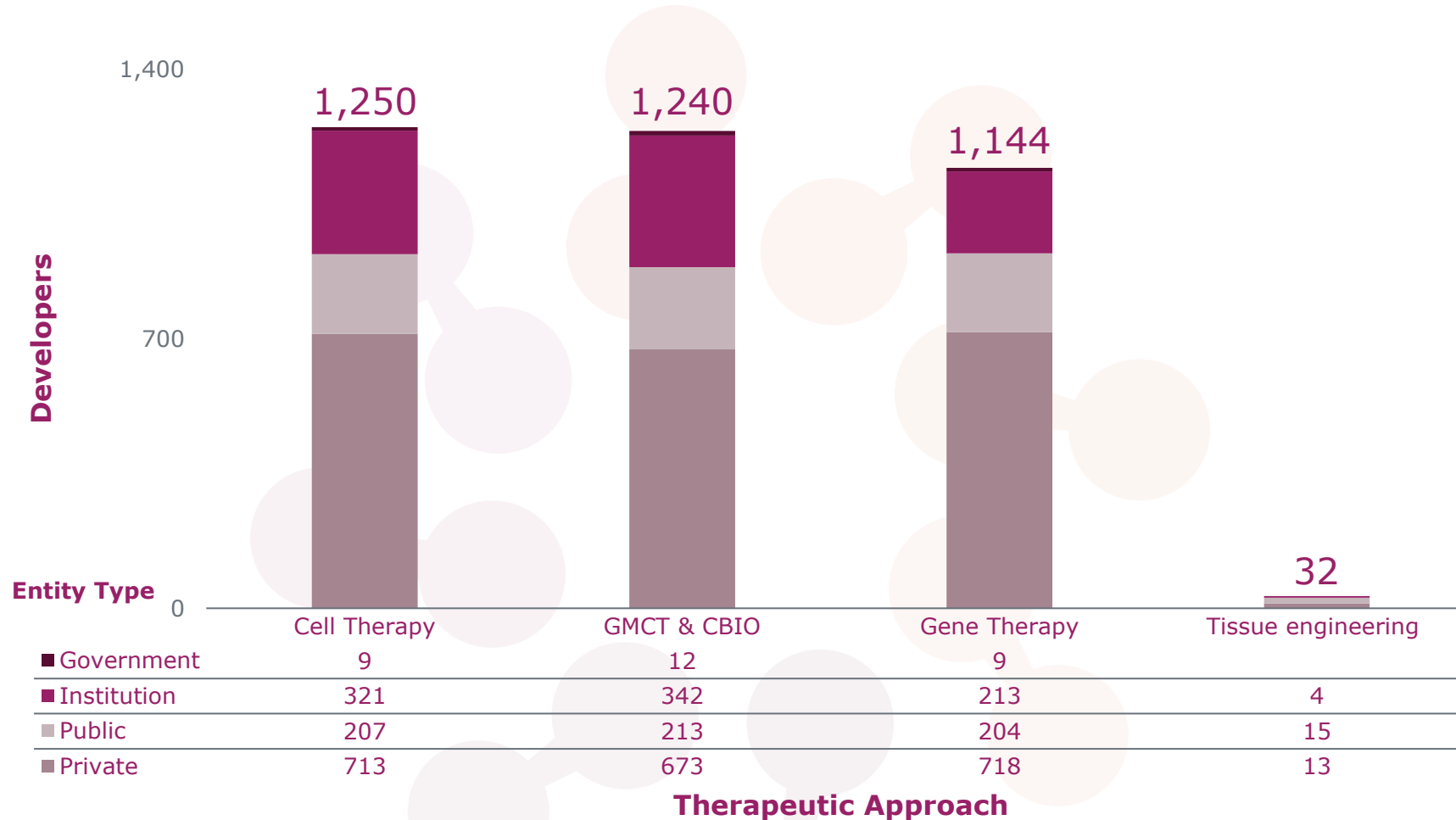3. Please see "Methodology Notes" for additional details
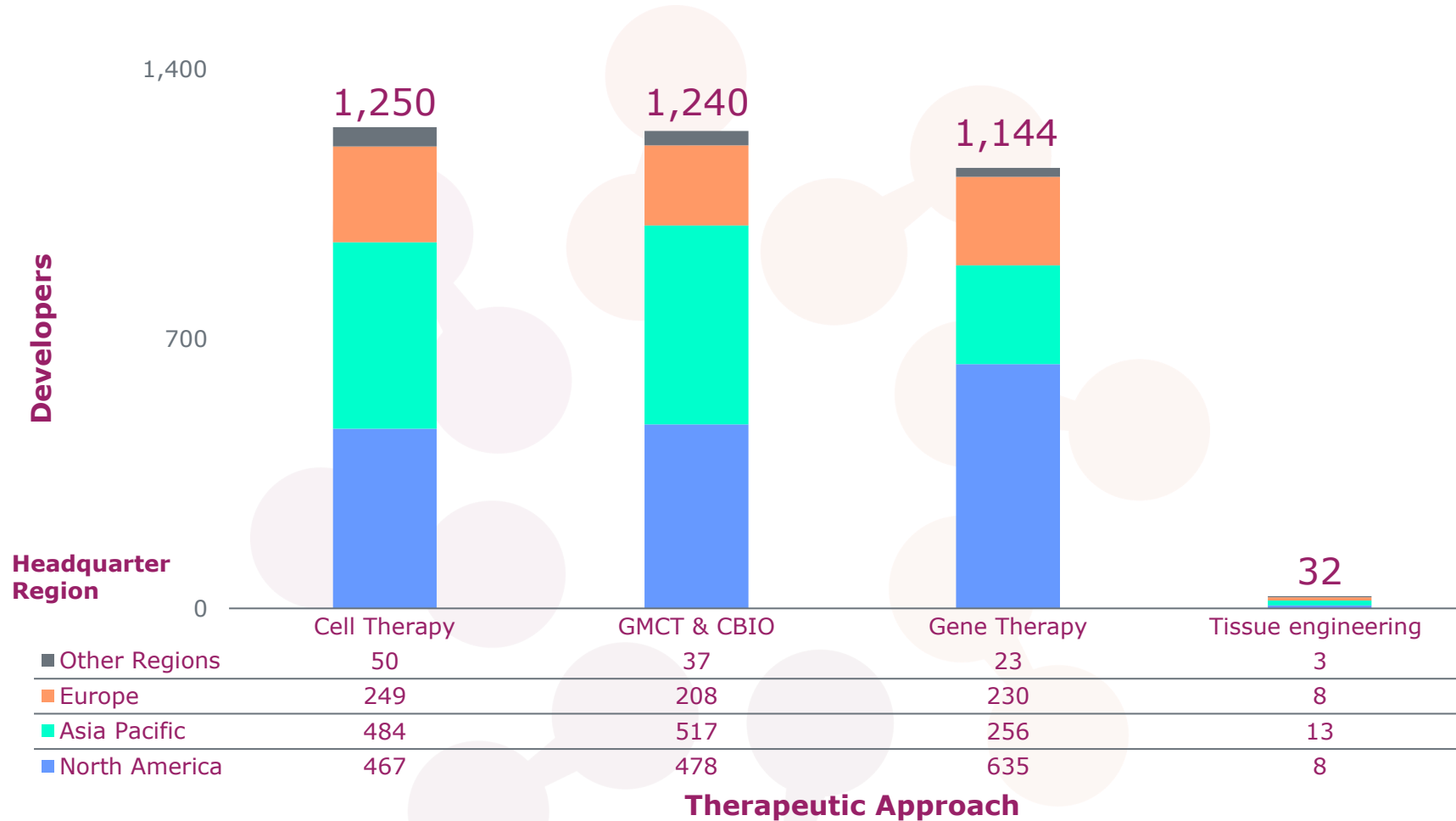
Developers by Entity Type and Headquarter Region

Developers by Entity Type and Headquarter Region — Stacked bar chart

Entity type totals: Private **1,832**, Public **461**, Institution **670**, Government **18**

Headquarter Region

	Private	Public	Institution	Government
■ Other Regions	51	9	36	
■ Europe	360	62	165	
■ Asia Pacific	614	149	267	6
■ North America	807	241	202	12

Entity Type

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

Alliance *for* Regenerative Medicine

Developers by Therapeutic Approach and Entity Type

Developers

1,400

700

0

Entity Type	Cell Therapy	GMCT & CBIO	Gene Therapy	Tissue engineering
■ Government	9	12	9	
■ Institution	321	342	213	4
■ Public	207	213	204	15
■ Private	713	673	718	13

Therapeutic Approach

Chart totals: Cell Therapy 1,250 | GMCT & CBIO 1,240 | Gene Therapy 1,144 | Tissue engineering 32

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

Headquarter Region	Cell Therapy	GMCT & CBIO	Gene Therapy	Tissue engineering
■ Other Regions	50	37	23	3
■ Europe	249	208	230	8
■ Asia Pacific	484	517	256	13
■ North America	467	478	635	8

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 October 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 immuno-oncology (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