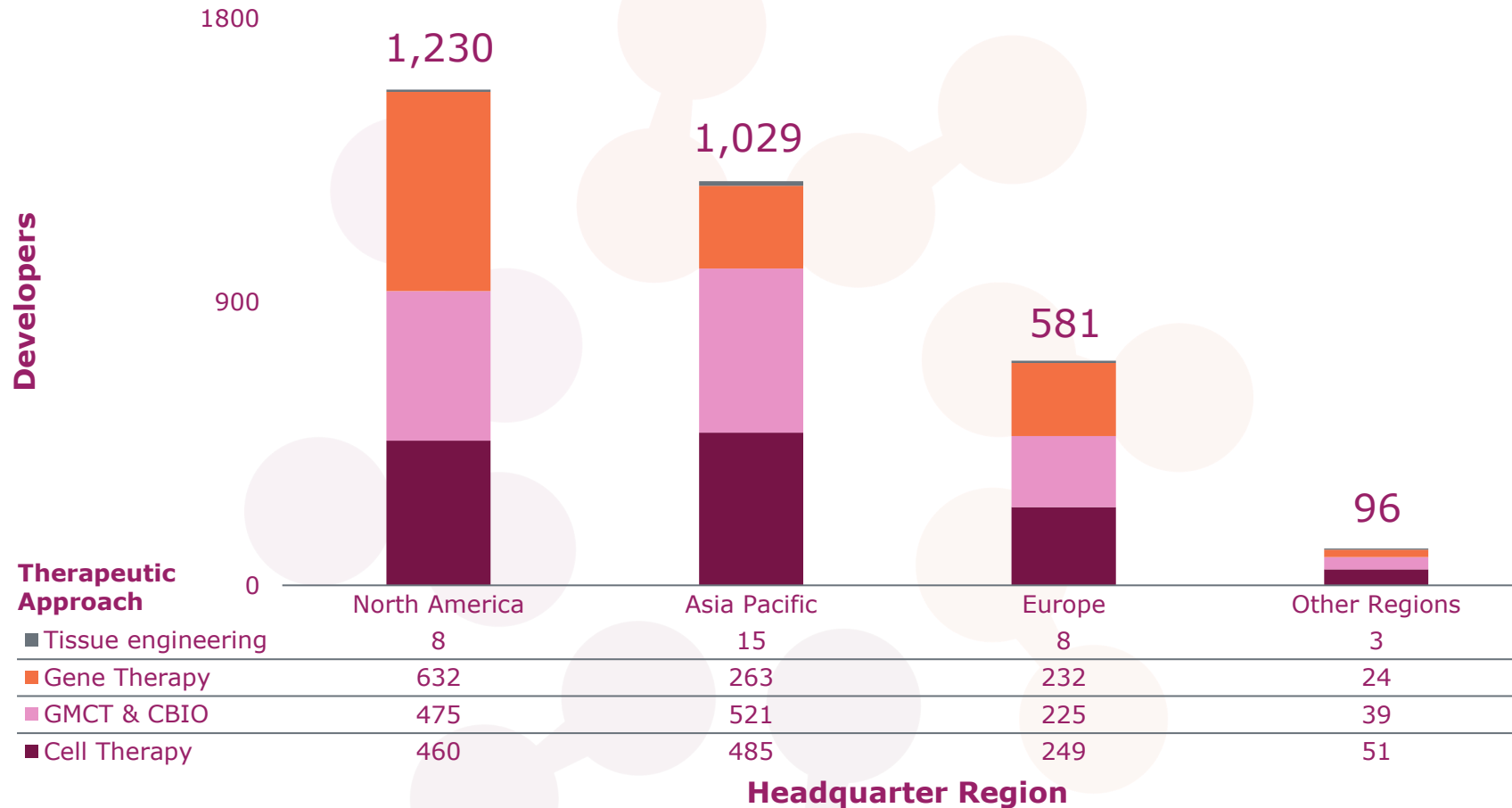
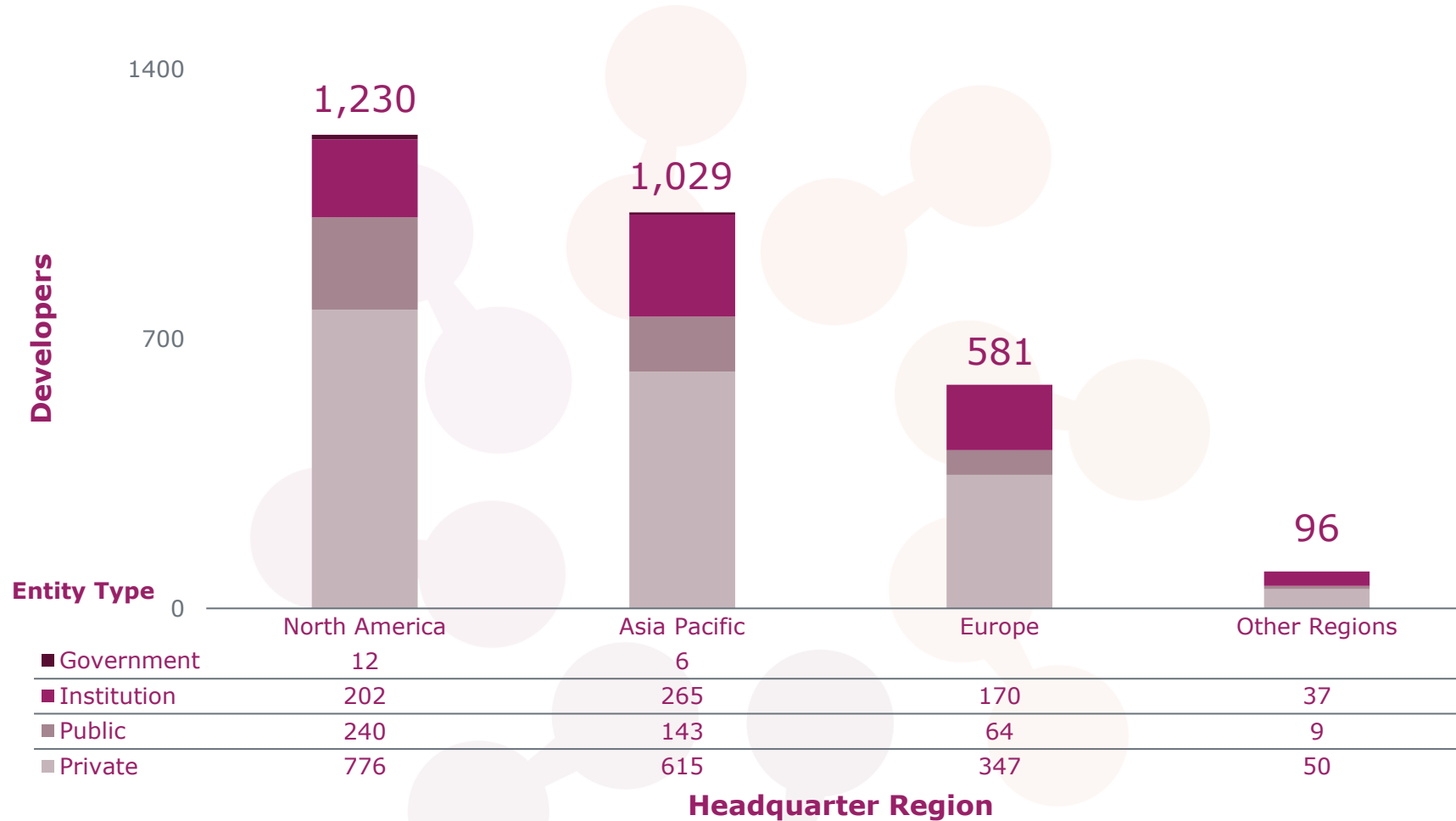


Developers by Headquarter Region and Therapeutic Approach



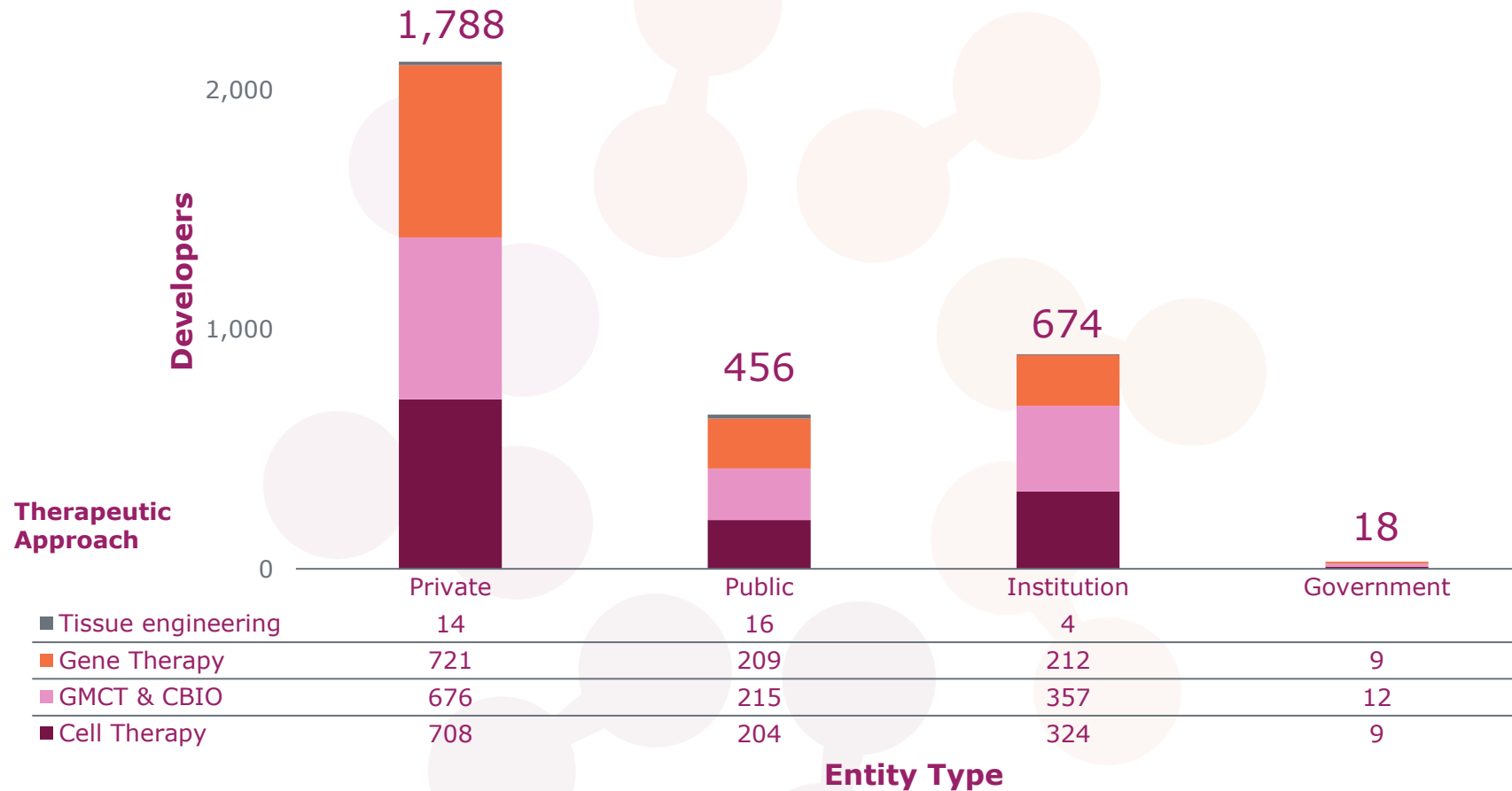
1. Within-graph labels represent headquarter region totals
2. Developers may work across multiple therapeutic approaches; sum of therapeutic approach totals will not be equivalent to regional totals
3. Please see "Methodology Notes" for additional details

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

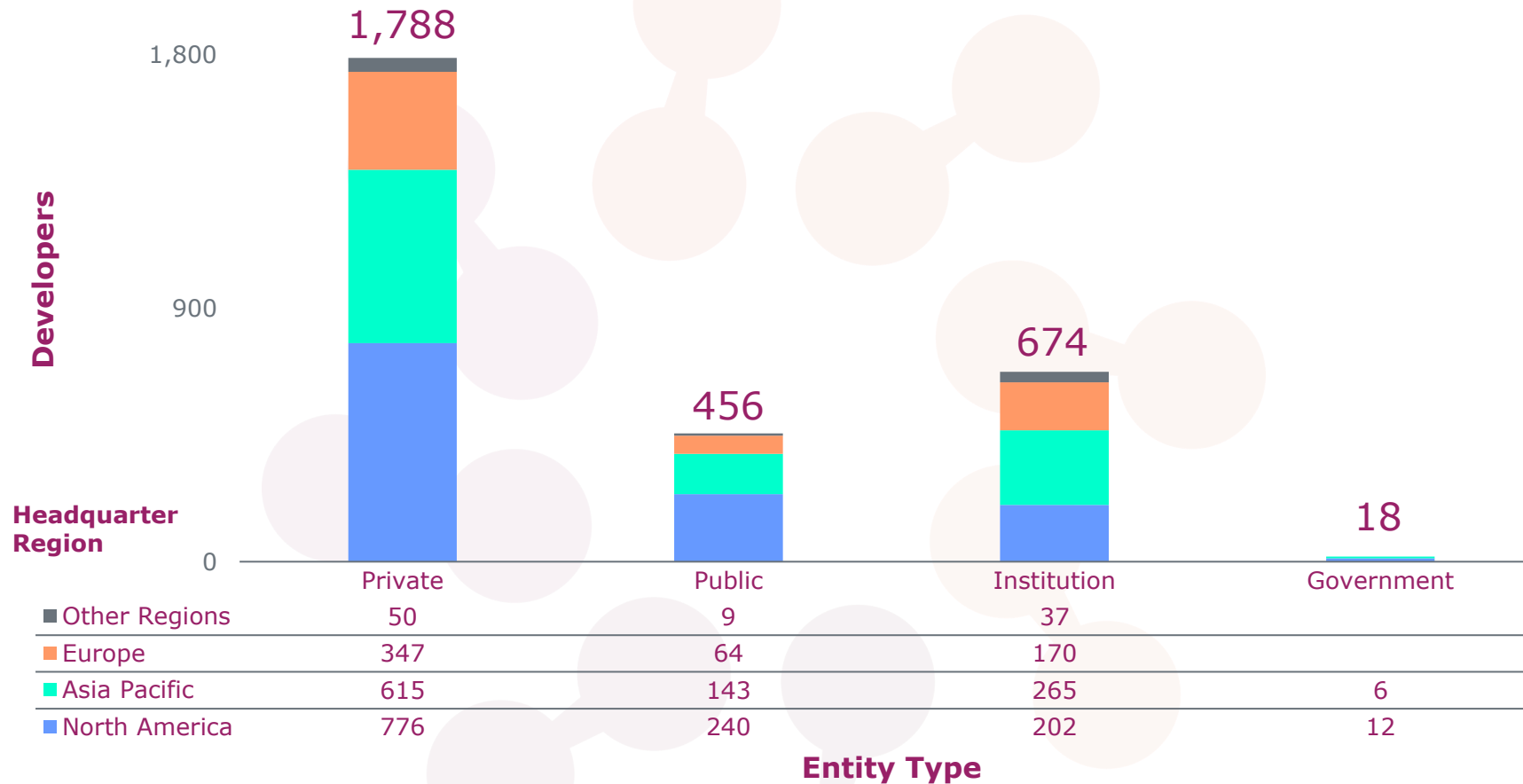


1. Within-graph labels represent entity type totals

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

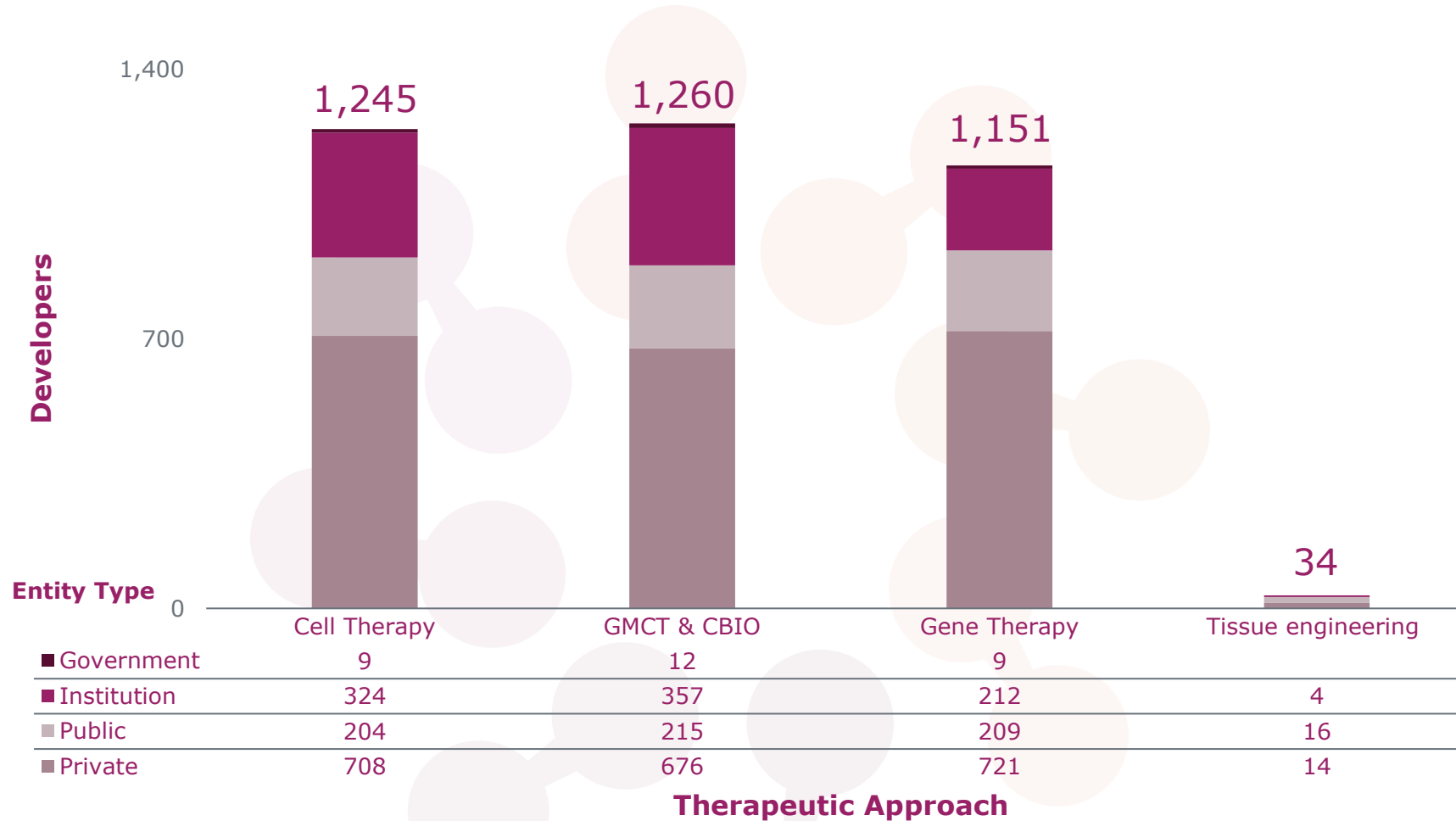
3. Please see "Methodology Notes" for additional details

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

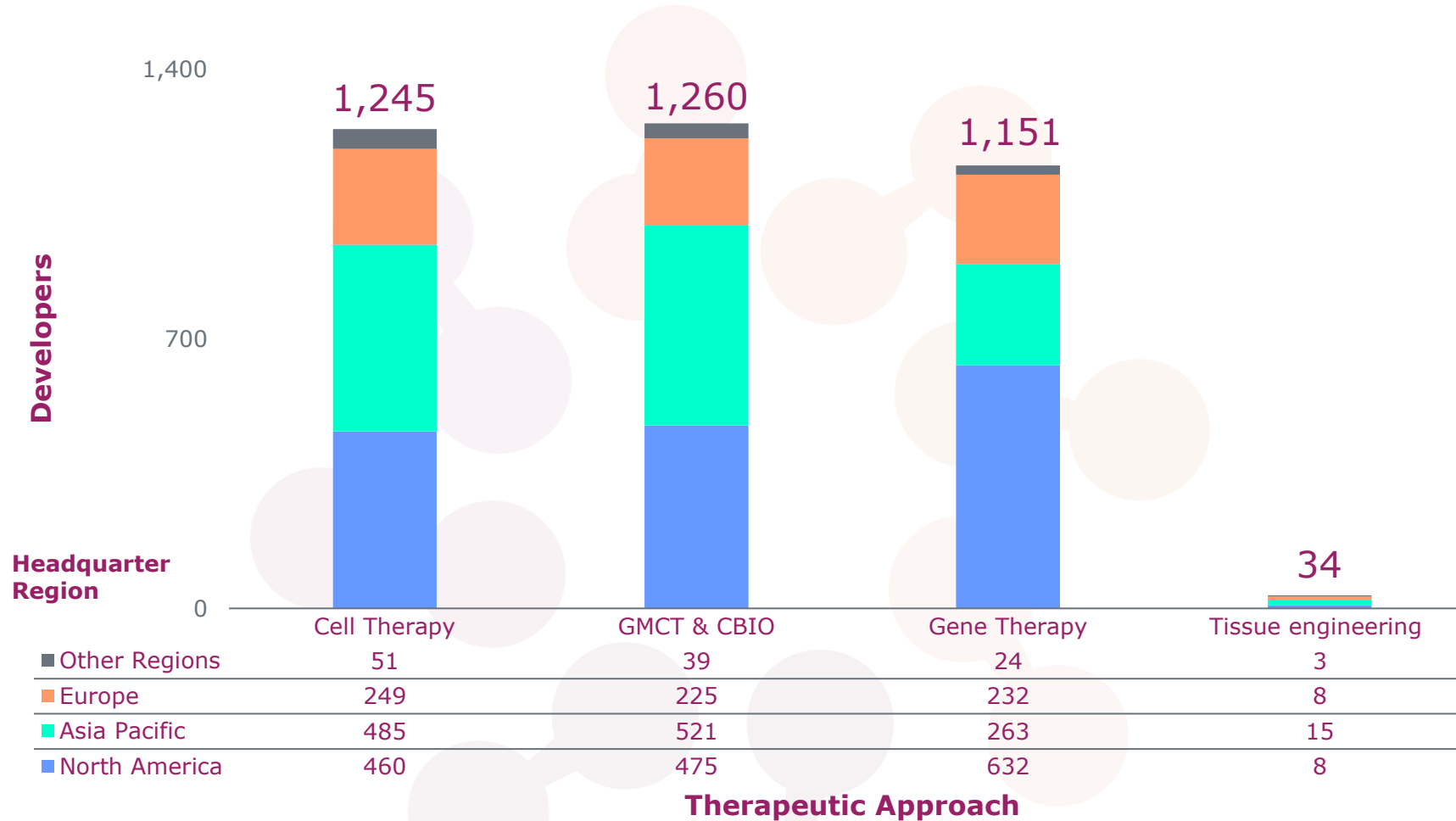


1. Within-graph labels represent therapeutic approach totals

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 December 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