### BIOINFORMANT

# Mesenchymal Stem Cells, Advances & Applications



1st and Only Market Research firm to Specialize in the Stem Cell industry

#### **TABLE OF CONTENTS**

1.	REPORT OVERVIEW 20	
1.1 1.2 1.3 1.4 1.4.1 1.4.3 1.4.4 1.4.5 1.4.6 1.5	Statement of the Report 22 Target Demographic 24 Report Sources 24 Purpose of the Report 24 Survey Recent MSC Advancements 25 Assess Opportunities for Commercialization 25 Identify Major Market Players & Assess the Competitive Environment Identify Existing and Emerging Trends 26 Identify Critical Opportunities and Threats within the MSC Market Executive Summary 27 Introduction 28	25 26
2.	MESENCHYMAL STEM CELLS (MSCS): AN OVERVIEW 30	
2.1 2.2 2.3 2.4	Stabilization of hMSCs as a Technology 30 The Impact of MSCs on Regenerative Medicine 31 Timeline of MSC Nomenclature 31 Sources of MSCs 32	
2.4.1 2.4.2 2.4.3 2.5	Bone Marrow-Derived MSCs (BM-MSCs) 33 Adipose-Derived MSCs (AD-MSCs) 34 Umbilical Cord-Derived MSCs 34 Cell Surface Markers in MSCs 35	
2.6 2.7 2.8	In Vitro Differentiation Potentials of MSCs 36 Soluble Factors Secreted by MSCs 37 Stemness Genes Present in MSCs 38	
3.	PUBLISHED SCIENTIFIC PAPERS ON MSCS 40	
3.1 3.2 3.3 3.4 3.5	Number of Papers on MSCs & iPSCs Compared 41  Number of Papers Published on MSC-based Clinical Trials 43  Number of Papers on Clinical Trials using MSCs for Specific Diseases  Published Papers on Modified MSCs 46  Published Papers on MSC-Derived Exosomes 47	44
4.	STEM CELLS PATENT LANDSCAPE: AN OVERVIEW 49	
4.1 4.1.1 4.1.2 4.1.3 4.2 4.2.1	Geographical Distribution of Stem Cell Patent Filing 50 Leading Players in Stem Cell Patent Arena 51 Types of Patent Document Holders in Stem Cell Arena 52 Top Ten Stem Cell Patent Owners by Size of Patent Portfolio 52 MSC Patents 53 Top Ten MSC Patent Applicants 54	
4.2.2 4.2.3 4.2.4 4.2.5	Status of MSC Patent Applications 55 MSC Patent Jurisdictions 55 Top Ten MSC Patent Inventors 56 Top Ten MSC Patent Owners 57	
4.2.6 4.2.7 4.2.8 4.2.9	Patent Landscape of MSC-Derived Exosomes 57  Number of Patent Applications by Year 58  MSC-Exosomes Patent Jurisdiction 59  Top Ten Patent Inventors 59	

5.	MSCS: CLINICAL TRIAL LANDSCAPE 60	
5.1 5.1.1 5.1.2 5.1.3 5.1.4	Analysis of Data from ClinicalTrials.gov 60 Sources of MSCs for Clinical Trials 62 Autologous vs. Allogeneic MSCs in Clinical Studies 63 Types of Funding for MSC-based Clinical Trials 64 Types of MSC-based Clinical Trials 65	
5.1.5 5.2 5.3 5.3.1 5.3.2 5.3.3	MSC-based Clinical Trials by Phase of Development 66 Administration of MSCs in Clinical Trials 67 MSC Clinical Trials by Disease Category 67 MSC-based Clinical Trials for Musculoskeletal Disorders 68 MSC-based Clinical Trials for Neurological Disorders 69 Clinical Trials involving MSC-derived Exosomes 70	
6.	BIOENGINEERING SOLUTIONS TO BOOST MSC'S FUNCTIONS	73
6.1 6.2 6.3 6.3.1 6.3.2 6.3.3 6.3.4 6.3.5 6.4	Small-Molecule Priming 73 Particle Engineering 74 Genetic Engineering 74 Engineering MSCs to Go Beyond their Innate Functions 75 Engineered MSCs for Neurological Conditions 76 Engineered MSCs for Cardiovascular Diseases 77 Engineered MSCs for Lung Injury 77 Engineered MSCs for Diabetes 78 Bioengineering Approaches to Improve MSC Administration 78	
7.	MANUFACTURING OF MSCS 80	
7.1 7.2 7.3 7.3.1 7.3.2.1 7.3.2.2 7.3.2.3 7.3.2.4 7.4 7.4.1 7.4.2 7.5 7.6 7.7 7.8 7.8.1	Rocking Bioreactor 84 Hollow Fiber Bioreactors 84	
7.8.2 7.8.3 7.8.4 7.9 7.9.1 7.9.2 7.9.3 7.9.4 7.10 7.10.1	Cell Washing and Concentration 97 Safety & Potency Assays 97 Surface Markers for Identification during MSC Manufacture 98 Autologous & Allogeneic MSC Manufacturing: A Comparison 99 Manufacturing Cost: Autologous and Allogeneic MSCs 100 Cost of Manufacturing Autologous MSCs 101 Cost of Donor Screening & Testing 101 Cost for Release Testing 102 Cost Breakdown in MSC Manufacturing 102 Strategies for Cost Reduction 103	
7 10 1 1	<del>-</del>	10

7.10.1.2 7.10.1.3 7.10.1.4	3	CoG Breakdown in Partially-Automated MSC Manufacturing CoG Breakdown in Fully Automated MSC Manufacturing 105 Higher Throughput in Partially Automated Facilities 106	104
8.	SMALL	SCALE PROCESSING OF MSCS 108	
8.1 8.2	Model [ Culture		
9.	LARGE	S-SCALE MANUFACTURING OF MSCS 114	
9.1		ur Common Bioprocessing Strategies for Large-Scale Expansion	of MSCs115
9.2 9.3 9.3.1	Commo	only Used Sources of MSCs for Large-Scale Expansion 116 only used Culture Media for Large-Scale Expansion of MSCs	117
9.4		sion Ratios Achieved with Different Culture Media 117 rison between the Four Large-Scale MSC Expansion Strategies	119
10.	CONTR	RACT MANUFACTURING FOR CELL & GENE THERAPIES	120
10.1 10.2		ed for Staff with Expertise 120 ty Constraints 120	
10.3 10.4	CDMO	Platforms Showing Greatest Growth Potential 121 rcing Trends for Cell & Gene Therapies (CGT) 121	
10.4.1	Numbe	er of CDMOS Utilized by Biotechs122	
10.5 10.5.1	Contra	CDMOs 122 ct Manufacturing Organizations (CMOs) 123	
10.5.1.1 10.5.2		Major Services offered by CMOs 123	104
10.5.2		ct Development and Manufacturing Organizations (CDMOs) Bioprocessing Capacity 124	124
10.6.1	Capac	ity Growth over Time 124	
10.6.2		t Distribution of Capacity by Facility Size 126	
10.6.3 10.7		Bioprocessing Capacity by Region 126 bbal CDMOs in 2022 128	
10.7.1		Cell & Gene Therapy CDMOs in the U.S 128	
10.7.2		Cell & Gene Therapy Contract Manufacturers in Europe 129	
10.8 10.8.1		Domination in European Cell & Gene Therapy Contract Manufactu Gene Therapy GMP Manufacturing in U.K. 130	ıring 130
10.8.1		leanroom Footprint for CGT Manufacturing by Year 131	
10.8.3	Cell Th	nerapy Process Capabilities in the U.K. by Types of Process	132
10.8.4		Therapy Process Capabilities in the U.K. by Types of Process	133
10.8.5	Countr	ies Importing Cell & Gene Therapy Services from U.K. 134	
11.	MAJOR	R DISEASES ADDRESSED BY MSCS 136	
11.1		s using MSCs for Autoimmune Diseases 136	
11.2 11.3		using MSCs for Cardiovascular Diseases 137 using MSCs for Neurodegenerative Diseases 138	
11.4		s using MSCs for Bone & Cartilage Diseases 139	
11.5		s using MSCs in GvHD 140	
11.6		susing MSCs in Crohn's Disease 141	
11.7		using MSCs in Type 1 Diabetes 142 using MSCS in Systemic Lupus Erythematosus (SLE) 142	
11.8 11.9		using MSCS in Systemic Lupus Erythematosus (SLE) 142 using MSCs in Parkinson's disease (PD)143	
11.10		s using MSCs in Alzheimer's Disease (AD) 143	
11.11	Studies	using MSCs in Kidney Failure 144	
11.12	Studies	susing MSCs in Spinal Cord Injury (SCI) 144	

11.13	MSCs for Chronic Wounds	145		
12.	CURRENT STATUS OF MESEN	ICHYMAL STEM CELL	INDUSTRY 146	
12.1 12.1.1 12.1.2 12.1.2.1 12.1.3 12.1.4 12.1.5 12.1.5.2 12.2.1 12.2.2 12.2.1 12.2.2 12.2.3 12.2.6 12.2.6 12.2.7 12.2.8 12.2.6 12.2.7 12.3.1 12.3.1 12.3.2 12.3.3 12.3.1 12.3.2 12.3.3	Brief Account of Modified MSCs Genetic Modification of MSCs Priming of MSCs 148 Primed MSCs in Clinical Biomaterial Strategies 149 MSC Secretomes 150 MSCs in Topical Cosmetics Cosmetic Effects of Secre	146 147 Trials 148 151 retomes 151 ulations for Skincare eting Approval 155	152	
12.3.8	Carticel 163 Chondron 163			
12.3.11 12.3.12 12.3.13 12.3.14 12.3.15	DeNovo 163 Chondrocelect 164 Ossron164 JACC 164 MACI 165 Ortho-ACI 165 Spherox 165			
12.3.17	Ossgrow 166 Cartigrow 166			
	ViviGen 166			
	Cartiform 167			
13.	RECENT COLLABORATIONS IN	N MSC SECTOR	168	
13.1 13.2 13.3 13.4 13.5	RoosterBio's Partnership with AC RoosterBio's Partnership with Sh Pluristem's Collaboration with Th RoosterBio's Partnership with Ur Partnership between Cynata & F	niftBio 168 nuva Group 169 nivercells Technologies ujifilm 169		•
13.6 13.7	Collaboration between American RoosterBio's Partnership with Sa		Therapeutic Labs Corp 17	U

13.8 13.9 13.10 13.11 13.12 13.13	Research & Development Agreement & RoosterBio's Partnership with Sartorius Partnership between Catalent and Brai Collaboration between Cipla & Stempe Aethlon's Collaboration with University RoosterBio's Partnership with Senti Bio	nStorm 172 utics 172 of Pittsburgh 172
14.	MARKET ANALYSIS 174	
14.2 14.3 14.4 14.5 14.6 14.6.1 14.6.2 14.6.3 14.6.4 14.6.5 14.6.6 14.6.7	Price Tags of MSC-Based CT Treatmer Price Tags of MSC-Based Matrices Market Size of MSC-Based Therapies Global Market for MSC-Based Therapies Global Demand for MsC-Based Therapies Global Demand for MsCs in Academic Global Demand for MsCs in Clinical T Global Demand for MsCs for the Develop Global Demand for MsCs to Develop Global Demand for MsCs in Emerging Global Market for MsCs 182 Market Share of MsC-Based Business	177 178 eutics 179 n Cells (MSCs) 181 c and Preclinical Studies 181 rials 181 elopment of Therapeutics 181 Exosome Products 182 Industries 182
15.	COMPANY PROFILES 186	
15.1 15.1.2 15.1.3 15.2	101 Bio 186 Products 186 Services 187 AbbVie, Inc. 188	
15.2.1 15.3 15.3.1 15.4 15.5	SkinMedica Neck Correct Cream Abzena 189 Services 189 Adipomics, Inc. 190 Advancells 191	188
15.5.1 15.6 15.6.1 15.6.2 15.7 15.7.1 15.7.2 15.8	MSC-Derived Exosome Therapy Advent BioServices, Ltd. 192 Ultra Cold Storage Services 192 Quality Control Services 193 Aegle Therapeutics 193 Aegle's Platform Technology 193 Epidermolysis Bullosa 193 Aethlon Medical, Inc. 194	191
15.8.1 15.8.2 15.8.3 15.9 15.9.1 15.10	Hemopurifier in Infectious Disease Status of Clinical Studies 195 Hemopurifier in Cancer 195 AGC Biologics 196 Offerings 196 AgeX Therapeutics, Inc. 197 Pluristem Technology 197	194
15.10.2 15.10.3	Induced Tissue Generation 197 UniverCyte 198 HyStem Delivery Technology 198 AlloSource, Inc. 199	
15.11.1 15.11.2	Allografts with Tissue-derived MSCs Products 199	199
15.11.2 15.11.2		1 200

```
15.11.2.3
              AlloFlex Plus
                             200
15.11.2.4
              AlloFuse Cervical Grafts200
              AlloFuse Fiber and Fiber Boats 201
15.11.2.5
              AlloFuse Select CM
15.11.2.6
                                     201
15.12 Ambulero
                      202
15.12.1 Supercharged MSCs
                             202
15.12.2 Ambulero's Pipeline
                             202
15.13 American CryoStem Corporation
                                            203
15.13.1 Products
                      203
15.13.1.1
              CELLECT Tissue Harvesting System
                                                    203
              ACSelerateMAX hMSC Medium 203
15.13.1.2
15.13.1.3
              ATCELL Mesenchymal Stem Cells (ADSCs)
                                                           204
15.13.2 Services
                      204
              ATGRAFT Fat Storage 204
15.13.2.1
15.13.2.2
              Adult Stem Cell Program
                                            204
15.14 American Type Culture Collection (ATCC)
                                                    205
15.14.1 Stem Cell Products
                             205
15.15 AMS Biotechnology, Ltd. (AMSBIO)
                                            206
15.15.1 Products
15.16 Andelyn Biosciences
                             207
15.16.1 Andelyn's Solutions
                             207
15.17 Anemocyte S.r.I 208
15.17.1 Total GMP Capacity
                             208
15.17.2 Product Types 208
15.17.3 Manufacturing Services 208
15.18 Anterogen, Co., Ltd.
                             209
15.18.1 Products
                      209
15.18.1.1
              Cupistem Injection
                                     209
15.18.1.2
              Queencell Injection
                                     210
15.19 AQ Skin Solutions
15.19.1 Products
                      210
              AQ Active Serum
                                     210
15.19.1.1
15.19.1.2
              AQ Eye Serum 211
              AQ Lash
15.19.1.3
                             211
              AQ Vaginal Rejuvenation System
15.19.1.4
                                                    211
15.20 Arranta Bio
                      212
15.20.1 Services
                      212
                      213
15.21 Aruna Bio
15.21.1 AB126 213
15.22 Avid Bioservices, Inc.
                             214
15.22.1 Services
                      214
15.23 Bacthera
                      215
15.23.1 Services
                      215
15.24 Baylx, Inc.
                      216
15.24.1 Technology
                      216
15.24.2 Rheumatoid Arthritis
                             216
15.24.3 Metastatic Cancer
                             216
15.24.4 FDA Clearance of IND Application
                                            217
15.25 BioCardia
                      218
15.25.1 BioCardia's Pipeline Overview 218
              CardiAMP Cell Therapy 218
15.25.1.1
               CardiALLO Cell Therapy
15.25.1.2
                                            219
15.26 BioCentriq
                      220
15.26.1 Clinical Manufacturing Services 220
15.26.2 Process Development Services 220
15.27 BioEden, Inc. 221
```

15.28 Bioinova s.r.o 221 15.28.1 MSCs for Clinical Trials 221 15.28.2 Novel Solution for Storage and Transportation of Cells 222 15.29 BioRestorative Therapies 223 15.29.1 BRTX-100 223 15.29.2 ThermoStem 223 15.30 Bioscience Institute S.p.A 224 15.30.1 LIPOSKILL 224 15.30.2 HAIRSKILL 224 15.30.3 GYNSKILL 224 15.30.4 LIPOSKILL PLUS 225 15.31 Bio-Techne 225 15.31.1 Mesenchymal Stem Cell Products 225 15.32 Blue Horizon International, LLC 226 15.32.1 BHI's Stem Cell Division 15.33 Boehringer Ingelheim BioXcellence 227 15.33.1 Services 227 15.33.2 Cell Line Development Services 227 15.34 Bonus Biogroup, Ltd. 15.34.1 BonoFill 228 15.34.2 MesenCure 228 15.35 BrainStorm Cell Therapeutics 229 15.35.1 MSC-NTF Cells 229 15.36 Caregen Nordic 230 15.36.1 Dermaheal HSR 230 15.36.2 Dermaheal HL 230 15.36.3 Dermaheal SB 231 15.36.4 Dermaheal Stem C'rum 231 15.36.5 Dermaheal Stem C'rum SR 231 15.37 CardioCell, LLC 232 15.37.1 The itMSC Advantage 232 15.37.2 Clinical Trials 232 15.38 Catalent Pharma Solutions 233 15.38.1 OneBio Integrated Suite 233 15.38.2 Gene Therapy Services 233 15.38.3 Cell Therapy Services 234 15.39 CCRM 234 15.39.1 CDMO Services 234 15.40 Cellipont Bioservices 235 15.40.1 Cellipont's Capabilities 235 15.40.2 Cellipont's Cell Expertise 236 15.41 Celprogen, Inc. 237 15.41.1 Products 237 15.41.1.1 FolliStem 237 15.41.1.2 FolliStem Jawan 237 15.42 CellResearch Corporation, Pte Ltd. 238 15.42.1 Umbilical Cord Lining Stem Cells 238 15.43 Celltex Therapeutics Corporation 239 15.43.1 Therapy Services 239 15.44 Cellular Biomedicine Group, Inc. 240 15.45 Citius Pharmaceuticals, Inc. 241 15.45.1 Stem Cell Platform 241 15.46 Charles River Laboratories International, Inc. 242 15.46.1 Products & Services 242 15.47 Corestem, Inc. 243 15.47.1 ALS (NeuroNata-R) 243

47.40 Q P!	
15.48 Creative Bioarray 244	
15.48.1 MSC Services 244	Comisso 244
15.48.1.1 MSC Isolation and Expansion 9 15.48.1.2 MSC Characterization Service	
15.48.1.3 MSC Differentiation Service	245 245
15.49 Curia Global, Inc. 246	243
15.49.1 Services 246	
15.50 Cynata Therapeutics, Ltd. 247	
15.50.1 Cymerus Platform 247	
15.50.1.1 Importance of Cymerus Techn	ology 247
15.50.2 Preclinical Development 248	
15.50.2.1 GvHD 248	
15.50.2.2 Critical Limb Ischemia 248	
15.50.2.3 Asthma 248	
15.50.2.4 Heart Attack 249	
15.50.2.5 Diabetic Wounds 249	
15.50.2.6 Coronary Artery Disease (CAD	
15.50.2.7 Acute Respiratory Distress Syr	ndrome (ARDS) 249
15.50.2.8 Sepsis 250	
15.50.2.9 Osteoarthritis 250	
15.51 Cytovance Biologics 251	
15.51.1 CGMP Manufacturing 251 15.52 Dendreon 252	
15.52.1 Provenge Immunotherapy 252	
15.52.2 Services 252	
15.53 Direct Biologics 253	
15.53.1 ExoFlo 253	
15.54 ElevateBio 254	
15.54.1 ElevateBio's Enabling Technologies	254
15.54.2 BaseCamp cGMP 255	
15.55 Exothera 256	
15.55.1 Exoscan Process Analysis Services	256
15.55.2 Process Design & Development Service	ces 256
15.55.3 GMP Manufacturing Services 257 15.56 EXOSOMEplus 258	
15.57 FUJIFILM Cellular Dynamics, Inc.	259
15.57.1 iCell Mesenchymal Stem Cells 259	200
15.58 Fujifilm Diosynth Biotechnologies	260
15.58.1 Cell & Gene Therapy Services 260	
15.59 Future Cell Japan Co., Ltd. 261	
15.59.1 BABY STEM 261	
15.60 Genezen 262	
15.60.1 Genezen's Capabilities 262	
15.61 Hope Biosciences, LLC 264	
15.61.1 Adult Stem Cell Banking 264	
15.61.2 Newborn Stem Cell Banking 264	
15.61.3 Hope Sponsored Clinical Trials 264	
15.62 Invitrx Therapeutics 266 15.62.1 Reluma 266	
15.63 JCR Pharmaceuticals, Co., Ltd. 267	
15.63.1 TEMCELL HS Inj. 267	
15.64 Just-Evotec Biologics, Inc. 268	
15.64.1 J.POD Biomanufacturing Facility	268
15.64.2 J.Design Solutions 268	
15.64.3 J.DISCOVERY – Molecule Discovery	268
15.64.4 J.MD – Molecule Design 269	

```
15.64.5 JP3 – Process & Product Design
                                            269
15.64.6 J-POD – Manufacturing Design 269
15.65 Kimera Labs, Inc.
15.65.1 XoGlo 270
15.65.2 XoGlo Pro
15.65.3 Equisome HC 272
15.65.4 Vive
              272
15.65.4.1
               Effects of MSC Exosomes on Skin
                                                    272
15.66 LifeCell 273
15.66.1 Large-Scale Manufacturing of MSCs
15.67 Longeveron
                      274
15.67.1 Lomecel-B
                      274
15.67.2 Focused Therapeutic Areas
                                     274
15.67.2.1
              Hypoplastic Left Heart Syndrome (HLHS) Research Program
                                                                          275
15.67.2.2
              Alzheimer's disease (AD) Research Program
15.67.2.3
              Aging Frailty Research Program 275
15.67.2.4
              Metabolic Syndrome Research Program 275
              Acute Respiratory Distress Syndrome (ARDS) Research Program
                                                                                  276
15.67.2.5
15.68 Lonza Group, Ltd.
                             277
15.68.1 Product Overview
                             277
15.68.1.1
               Poietics
                             277
              MSCGM Growth Medium
                                            278
15.68.1.2
              TheraPEAK Growth Medium
15.68.1.3
                                            278
              hMSC Chondrogenic Differentiation Medium
15.68.1.4
                                                           278
              hMSC Adipogenic Differentiation Medium
15.68.1.5
                                                           278
              ReagentPack Subculture Reagents
                                                    279
15.68.1.6
15.68.1.7
              Trypsin/EDTA for Mesenchymal Stem Cells
                                                           279
15.69 Lorem Cytori USA, Inc. 280
15.69.1 Celution System
                             280
15.70 Lykan Bioscience
                              281
15.70.1 Process Development 281
15.70.2 Analytical Development 281
15.70.3 Manufacturing Science & Technology
                                            282
15.70.4 Clinical & Commercial Manufacturing
                                            282
15.70.5 Supply Chain & Logistics
15.70.6 Quality & Compliance 283
15.71 Matica Biotechnology, Inc.
                                     284
15.71.1 Cell Line Development Services
                                            284
15.71.2 Process Development Services 284
15.71.3 Assay Development Services
                                     284
15.71.4 GMP Production Services
15.71.5 Product Release & Stability Testing
                                            285
15.72 Medipost, Co., Ltd.
                             286
15.72.1 Products
                      286
15.72.1.1
              Cartistem
                             286
15.72.1.2
              Pneumostem
                             286
               SMUP-IA-01
15.72.1.3
                             287
15.72.1.4
               SMUP-IV-01
                             287
15.73 Mesoblast, Ltd. 288
15.73.1 Product Candidates
                             288
15.73.1.1
              Remestemcel-L 289
15.73.1.2
              Rexlemestrocel-L
                                     289
15.74 MilliporeSigma 290
15.74.1 Cell Culture & Analysis Products
                                            290
15.75 NecstGen
                      292
15.75.1 Cell Therapy Development & Manufacturing
                                                    292
```

```
15.75.2 Viral Vector Development & Manufacturing
                                                    293
15.75.3 Cleanroom Rental
                              293
15.76 Novus Biologicals, LLC 294
15.77 NuVasive, Inc. 295
15.77.1 Osteocel Family
                              295
15.78 OCT Therapies & Research Pvt. Ltd.
                                             296
15.79 Orthofix Medical, Inc.
15.79.1 Trinity ELITE 297
15.79.2 TrinityEvolution 297
15.80 Personal Cell Sciences, Corp.
15.80.1 Autokine CM 298
15.80.2 Products
                      298
               U Autologous Adult Stem Cell Regenerative Firming Serum
15.80.2.1
                                                                           298
               U Autologous Adult Stem Cell Regenerative Eye Cream 299
15.80.2.2
               U Autologous Adult Stem Cell Regenerative Moisturizer 299
15.80.2.3
15.81 Personalized Stem Cells, Inc.
                                     300
15.81.1 Personalized Stem Cell Study: Knee Osteoarthritis
                                                            300
15.82 Porton Advanced
                              301
               Cell Therapy Services
15.82.1
                                     301
15.82.2 Portons LVV Services 301
15.83 Pluristem Therapeutics, Inc.
                                     302
15.83.1 PLX Products 302
15.83.2 PLX-PAD
                      303
               Mechanism of Action
15.83.2.1
                                     303
15.83.3 PLX-R18
                      303
              Mechanism of Action
                                     304
15.83.3.1
15.83.4 PLX-Immune 304
15.83.4.1
              Mechanism of Action
                                     304
15.84 PromoCell GmbH
                              305
15.84.1 Human Stem & Blood Cell Culture Products
                                                    305
15.85 Regeneus, Ltd. 306
15.85.1 Technologies 306
               Progenza
                              306
15.85.1.1
               Mechanism of Action
15.85.1.1.1
                                     306
               Svaenus
15.85.1.2
                              307
               Mechanism of Action
15.85.1.2.1
                                     307
15.85.2 Product Pipeline
                              307
15.86 Reliance Life Sciences Pvt. Ltd. 308
15.86.1 Regenerative Medicine Products
                                             308
15.87 Rentschler Biopharma 309
15.87.1 Services
                      309
15.88 Resilience
                      310
15.88.1 Resilience's Capabilities
                                     310
15.89 Richter-HELM 311
15.89.1 Services
15.90 RoosterBio, Inc. 312
15.90.1 RoosterBio's Technology
                                     312
15.90.2 Products
                      312
               Human Mesenchymal Stem Cells (hMSCs)
15.90.2.1
                                                            313
15.90.3 Genetic Engineering Tools
15.90.3.1
               Genetic Engineering Media
                                             314
               Cell Culture Media & Supplements
15.90.3.2
                                                    314
15.90.4 Cell and Media Kits
                              315
15.90.5 MSC-derived Exosomes
                                     316
15.90.6 cGMP CliniControl Products
                                     316
15.90.7 Process Development Services 317
```

```
15.90.8 hMSC Analytical Services
                                      318
15.91 RoslinCT
                      319
15.91.1 Services
                      319
               Process Development
                                     319
15.91.1.1
               GMP Manufacturing
15.91.1.2
                                      320
               Quality Control 320
15.91.1.3
               Quality & Regulations
                                     320
15.91.1.4
               Product Storage & Logistics
15.91.1.5
                                             320
15.91.2 RoslinCT - Lykan Bioscience Combine 321
15.92 Samsung Biologics
                              321
15.92.1 Development Services 321
15.92.2 Manufacturing Services 321
15.93 Sentien Biotechnologies, Inc.
                                      322
15.93.1 SBI-101
                      322
15.93.1.1
               Prolonged Therapeutic Activity of MSCs in SBI-101
                                                                    322
15.93.1.2
               Sentien's Product Pipeline
                                             323
15.94 Smith & Nephew plc
15.94.1 Grafix 324
15.95 STEMCELL Technologies, Inc. 325
15.95.1 Products
                      325
               Mesenchymal Stem Cells (MSCs)
15.95.1.1
                                                     325
               Mesenchymal Stem and Progenitor Cell Research Products
                                                                            325
15.95.1.2
15.96 Stemedica Cell Technologies, Inc.
                                             326
15.96.1 BioSmart Technology 326
15.96.2 Clinical Pipeline
                              327
15.97 Stemmatters
                      328
15.98 Stempeutics Research Pvt. Ltd. 329
15.98.1 Stempeucel
                      329
15.98.1.1
               Process Description
                                      329
15.98.2 Stempeucare 330
15.98.3 Cutisera
                      330
15.98.4 Trichosera
                      330
15.98.5 Perioptisera
                      330
15.99 Syngene International Ltd.
                                      331
15.99.1 Services
                      331
15.100 TaiwanBio Therapeutics, Co., Ltd.
                                             332
15.101 Takeda Pharmaceutical Co., Ltd.
                                             333
               Alofisel (Darvadstrocel) 333
15.102 Symbiosis Pharmaceutical Services
                                             334
               Vial Filling Capability
15.102.1
                                      334
               Drug Product Testing
15.102.2
               Qualified Person Release
15.102.3
                                             335
               Clinical Labeling & Packaging
15.102.4
                                             335
15.102.5
               Product Development
15.103 Tempo Bioscience
                              336
               Products
                              336
15.103.1
               Human Cell Models
                                      336
15.103.1.1
               Services & Alliances
15.103.2
                                      336
15.104 Thermo Fisher Scientific337
15.104.1
               Cell Culture Services
                                     337
15.104.2
               Cell Therapy Solutions
                                     338
15.105 TranstoxBio
                      339
15.105.1
               Products
                              339
               CarcinogenSAFE
                                      339
15.105.1.1
15.105.1.2
               CardioSight
                              339
15.105.1.3
               HeMOToX
                              340
```

15.105.1.4 HepatoSight 340	
15.105.1.5 NeuroSAFE 340	
15.105.1.6 SkinIR System 340	
15.105.1.7 TransD System 340	
15.105.1.8 Human Umbilical Cord Blood Monocytes 341	
15.105.1.9 Human Peripheral Blood CD34 Positive Cells 341	
15.105.1.10 CD34+ Configured Cellular Platform 341	
15.105.1.11 Human Mesenchymal Stem Cells 341	
15.106 United Therapeutics Corporation 342	
15.106.1 Genetically-Enhanced Mesenchymal Stem Cells (GEM) 342	
15.107 Viralgen 343	
15.107.1 Service 343	
15.107.2 Viralgen's Facilities 343	
15.108 VIVEbiotech 344	
15.109 Waisman Biomanufacturing 345	
15.109.1 GMP Cell Therapeutic Capabilities 345	
15.109.2 Cell Bank Specifics 345	
15.109.3 Waisman Products & Processes 346	
15.110 WuXi Biologics 346	
15.110.1 Manufacturing Services 346	
15.111 Yapan Bio 347	
15.111.1 Process Development Services 347	
15.111.2 Process Characterization Services 348	
15.111.3 GMP Manufacturing Services 348	
15.112 Yposkesi 349	
15.113 Zimmer Biomet Holdings, Inc. 350	
15.113.1 Cellentra VCBM350	

#### **INDEX OF FIGURES**

FIGURE 7.4: Rocking Bioreactor 84 FIGURE 7.5: Hollow Fiber Bioreactors 85 FIGURE 7.6: Fixed-Bed Bioreactors 85 FIGURE 7.7: Number of Cells per Batch by Technologies 93		
FIGURE 7.8: Single-Use Harvestainer for Small Scale Application 96		
FIGURE 7.9: Single-Use Harvestainer for Large Scale Application 97		
FIGURE 7.10: Advantages & Disadvantages of Autologous and Allogeneic MSC	100	
FIGURE 7.11: Cost of Goods (CoG) in MSC Manufacturing 103		
FIGURE 7.12: Impact of Headcount on Overall CoG per Batch 104		
,	105	
FIGURE 7.14: CoG Breakdown in Fully Automated MSC Manufacturing 106		
FIGURE 7.15: Higher Throughput in Partially Automated Facilities 107		
FIGURE 8.1: Schematic of Sartorius' SelectT Automated Platform 112		
9 ,	113	
FIGURE 9.1: Four Common Bioprocessing Strategies for Large-Scale Expansion		116
FIGURE 9.2: Commonly Used Sources of MSCs for Large-Scale Expansion		16
FIGURE 9.3: Commonly used Culture Media for Large-Scale Expansion of MSCs		17
FIGURE 10.1: Outsourced Percent of CGT Manufacturing: Now and Five Years from the Property of Carta Manufacturing: Now and Five Years from the Property of Carta Manufacturing: Now and Five Years from the Property of Carta Manufacturing: Now and Five Years from the Property of Carta Manufacturing: Now and Five Years from the Property of Carta Manufacturing: Now and Five Years from the Property of Carta Manufacturing: Now and Five Years from the Property of Carta Manufacturing: Now and Five Years from the Property of Carta Manufacturing: Now and Five Years from the Property of Carta Manufacturing: Now and Five Years from the Property of Carta Manufacturing: Now and Five Years from the Property of Carta Manufacturing: Now and Five Years from the Property of Carta Manufacturing: Now and Five Years from the Property of Carta Manufacturing: Now and Five Years from the Property of Carta Manufacturing (Now and Five Years).	om Now	121
FIGURE 10.2: Number of CDMOs Utilized 122		
FIGURE 10.3: Major Services offered by CMOs 123	405	
	125	
FIGURE 10.5: Global Bioprocessing Capacity by Region/Country127	400	
1 17	132	22
FIGURE 10.7: Cell Therapy Process Capabilities in the U.K. by Types of Process		33 34
FIGURE 10.8: Gene Therapy Process Capabilities in the U.K. by Types of Proces FIGURE 11.1: Major Diseases Addressed by MSCs in Clinical Trials 136	S I	34
FIGURE 11.1: Major Diseases Addressed by Miscs in Clinical Thais 130 FIGURE 11.2: Percent Share of Autoimmune Diseases Using MSCs in Clinical Tri	iala 1	37
FIGURE 11.2: Percent Share of MSCs by Source in Trials for Cardiac Diseases		31
FIGURE 11.3: Percent Shares of Meurodegenerative Diseases in Clinical Trials us		s 139
FIGURE 11.5: % Shares of Studies using MSCs in Bone & Cartilage Diseases by		
FIGURE 12.1: The Four MSC Modification Techniques 146	Oddicc i	40
FIGURE 13.2: Priming Effects on MSCs 148		
FIGURE 14.1: Percent Share of Marketed CT, GT and TE Products 174		
FIGURE 14.2: Percent Market Share of CT Products by Indication 175		
	180	
FIGURE14.4: Global Market for MSCs by Geography, 2022-2030 183	•	
FIGURE 14.5: Market Share of MSCs by Business Segments 185		
,		

#### **INDEX OF TABLES**

TABLE 2.1: Timeline of MSC Nomenclature 32
TABLE 2.2: Sources of MSCs 33
TABLE 2.3: Advantages and Disadvantages of BM-MSCs 34
TABLE 2.4: Advantages and Disadvantages of AD-MSCs 34
TABLE 2.5: Advantages and Disadvantages of UC-MSCs 35
TABLE 2.6: Positive & Negative Markers in MSCs from different Sources 35
TABLE 2.7: In Vitro Differentiation Potentials of MSCs 36
TABLE 2.8: Soluble Factors Secreted by MSCs 37
TABLE 2.8: (CONTINUED) 38
TABLE 2.9: Some Typical Stemness Genes of MSCs 39
TABLE 3.1: Number of Published Papers on MSCs between 2000 to Present 40
TABLE 3.2: Number of Papers on MSCs & iPSCs Compared 42
TABLE 3.3: Number of Papers Published on MSC-based Clinical Trials, 2000 to Present 43

\_\_\_\_\_

TABLE 3.4: Percent Share of Papers for Specific Diseases, 2000-2022 TABLE 3.5: Published Papers on Modified MSCs 46	45	
TABLE 3.6: Number of PubMed Papers on MSC-Exosomes 48 TABLE 4.1: Number of Patent Documents in Stem Cell Therapies TABLE 4.2: Top Ten Players in Stem Cell Patent Arena 51	49	
TABLE 4.3: Top Ten Stem Cell Patent Owners by Size of Patent Portfoli TABLE 4.4: Number of MSC Patent Filings by Year, 2000 to Present	o 53 53	
TABLE 4.5: Top Ten MSC Patent Applicants 54 TABLE 4.6: Status of MSC Patent Applications by Year 55		
TABLE 4.7: MSC Patent Jurisdictions 55		
TABLE 4.7: (CONTINUED) 56 TABLE 4.8: Top Ten MSC Patent Inventors 56		
TABLE 4.9: Top Ten MSC Patent Inventors 57		
TABLE 4.10: Top Ten MSC-Exosome Patent Applicants 58		
TABLE 4.11: MSC-Exosomes Patent Jurisdiction 59		
TABLE 4.12: Top Ten MSC-Exosome Patent Inventors 59		
TABLE 5.1: Number of Clinical Trials involving MSCs by Region 61		
TABLE 5.2: Sources of MSCs for Clinical Trials 62		
TABLE 5.3: Clinical Trials involving Autologous and Allogneic MSCs	63	
TABLE 5.4: Types of Funding for MSC-based Clinical Trials 64		
TABLE 5.5: Types of MSC-based Clinical Trials 65		
TABLE 5.6: MSC-based Clinical Trials by Phase of Development 66		
TABLE 5.7: Examples of MSC-based Clinical Trials for Musculoskeletal	Disorders	68
TABLE 5.7: (CONTINUED) 69		
TABLE 5.8: MSC-based Clinical Trials for Neurological Disorders 70		
TABLE 5.9: Clinical Trials involving MSC-derived Exosomes 71	7.5	
TABLE 6.1: Examples of Bioengineered MSCs as Living Drug Factories		70
TABLE 6.2: Examples of Oncology Indications being studied using MSC		76
TABLE 6.3: Select Cases of Modified MSC Applications & Therapeutic C		
TABLE 7.1: Methods of Isolation of MSCs & Corresponding Culture Med	ia oi	
I ARLE 7.7. A Shanchot of Commercially Available Culture Systems		
TABLE 7.2: A Snapshot of Commercially Available Culture Systems	87	
TABLE 7.2: (CONTINUED) 88		
TABLE 7.2: (CONTINUED) 88 TABLE 7.2: (CONTINUED) 89		
TABLE 7.2: (CONTINUED) 88  TABLE 7.2: (CONTINUED) 89  TABLE 7.2: (CONTINUED) 90		
TABLE 7.2: (CONTINUED)       88         TABLE 7.2: (CONTINUED)       89         TABLE 7.2: (CONTINUED)       90         TABLE 7.2: (CONTINUED)       91		
TABLE 7.2: (CONTINUED) 88  TABLE 7.2: (CONTINUED) 89  TABLE 7.2: (CONTINUED) 90	87	
TABLE 7.2: (CONTINUED) 88 TABLE 7.2: (CONTINUED) 89 TABLE 7.2: (CONTINUED) 90 TABLE 7.2: (CONTINUED) 91 TABLE 7.3: Main Features of Commercially Available Bioreactors	87	
TABLE 7.2: (CONTINUED) 88 TABLE 7.2: (CONTINUED) 89 TABLE 7.2: (CONTINUED) 90 TABLE 7.2: (CONTINUED) 91 TABLE 7.3: Main Features of Commercially Available Bioreactors TABLE 7.4: Microcarriers for the Expansion of MSCs 94 TABLE 7.4: (CONTINUED) 95 TABLE 7.5: Basic Assays for MSCs 98	87	
TABLE 7.2: (CONTINUED) 88  TABLE 7.2: (CONTINUED) 89  TABLE 7.2: (CONTINUED) 90  TABLE 7.2: (CONTINUED) 91  TABLE 7.3: Main Features of Commercially Available Bioreactors  TABLE 7.4: Microcarriers for the Expansion of MSCs 94  TABLE 7.4: (CONTINUED) 95  TABLE 7.5: Basic Assays for MSCs 98  TABLE 7.6: Cell Surface Markers on MSCs and Fibroblasts 99	87	
TABLE 7.2: (CONTINUED) 88  TABLE 7.2: (CONTINUED) 89  TABLE 7.2: (CONTINUED) 90  TABLE 7.2: (CONTINUED) 91  TABLE 7.3: Main Features of Commercially Available Bioreactors  TABLE 7.4: Microcarriers for the Expansion of MSCs 94  TABLE 7.4: (CONTINUED) 95  TABLE 7.5: Basic Assays for MSCs 98  TABLE 7.6: Cell Surface Markers on MSCs and Fibroblasts 99  TABLE 7.7: Cost of Manufacturing Allogeneic MSCs 100	87	
TABLE 7.2: (CONTINUED) 88  TABLE 7.2: (CONTINUED) 89  TABLE 7.2: (CONTINUED) 90  TABLE 7.2: (CONTINUED) 91  TABLE 7.3: Main Features of Commercially Available Bioreactors  TABLE 7.4: Microcarriers for the Expansion of MSCs 94  TABLE 7.4: (CONTINUED) 95  TABLE 7.5: Basic Assays for MSCs 98  TABLE 7.6: Cell Surface Markers on MSCs and Fibroblasts 99  TABLE 7.7: Cost of Manufacturing Allogeneic MSCs 100  TABLE 7.8: Cost of Manufacturing Autologous MSCs 101	87	
TABLE 7.2: (CONTINUED) 88  TABLE 7.2: (CONTINUED) 89  TABLE 7.2: (CONTINUED) 90  TABLE 7.2: (CONTINUED) 91  TABLE 7.3: Main Features of Commercially Available Bioreactors  TABLE 7.4: Microcarriers for the Expansion of MSCs 94  TABLE 7.4: (CONTINUED) 95  TABLE 7.5: Basic Assays for MSCs 98  TABLE 7.6: Cell Surface Markers on MSCs and Fibroblasts 99  TABLE 7.7: Cost of Manufacturing Allogeneic MSCs 100  TABLE 7.8: Cost of Manufacturing Autologous MSCs 101  TABLE 7.9: Cost of Goods (CoG) in MSC Manufacturing 102	92	
TABLE 7.2: (CONTINUED) 88  TABLE 7.2: (CONTINUED) 90  TABLE 7.2: (CONTINUED) 91  TABLE 7.3: (CONTINUED) 91  TABLE 7.3: Main Features of Commercially Available Bioreactors  TABLE 7.4: (Microcarriers for the Expansion of MSCs 94  TABLE 7.4: (CONTINUED) 95  TABLE 7.5: Basic Assays for MSCs 98  TABLE 7.6: Cell Surface Markers on MSCs and Fibroblasts 99  TABLE 7.7: Cost of Manufacturing Allogeneic MSCs 100  TABLE 7.8: Cost of Manufacturing Autologous MSCs 101  TABLE 7.9: Cost of Goods (CoG) in MSC Manufacturing 102  TABLE 7.10: CoG Breakdown in Partially-Automated MSC Manufacturin	92 g 105	
TABLE 7.2: (CONTINUED) 88  TABLE 7.2: (CONTINUED) 90  TABLE 7.2: (CONTINUED) 91  TABLE 7.3: Main Features of Commercially Available Bioreactors  TABLE 7.4: Microcarriers for the Expansion of MSCs 94  TABLE 7.4: (CONTINUED) 95  TABLE 7.5: Basic Assays for MSCs 98  TABLE 7.6: Cell Surface Markers on MSCs and Fibroblasts 99  TABLE 7.7: Cost of Manufacturing Allogeneic MSCs 100  TABLE 7.8: Cost of Manufacturing Autologous MSCs 101  TABLE 7.9: Cost of Goods (CoG) in MSC Manufacturing 102  TABLE 7.10: CoG Breakdown in Partially-Automated MSC Manufacturing TABLE 7.11: CoG Breakdown in Fully Automated MSC Manufacturing	92	
TABLE 7.2: (CONTINUED) 89  TABLE 7.2: (CONTINUED) 90  TABLE 7.2: (CONTINUED) 91  TABLE 7.3: Main Features of Commercially Available Bioreactors  TABLE 7.4: Microcarriers for the Expansion of MSCs 94  TABLE 7.4: (CONTINUED) 95  TABLE 7.5: Basic Assays for MSCs 98  TABLE 7.6: Cell Surface Markers on MSCs and Fibroblasts 99  TABLE 7.7: Cost of Manufacturing Allogeneic MSCs 100  TABLE 7.8: Cost of Manufacturing Autologous MSCs 101  TABLE 7.9: Cost of Goods (CoG) in MSC Manufacturing 102  TABLE 7.10: CoG Breakdown in Partially-Automated MSC Manufacturing TABLE 7.11: CoG Breakdown in Fully Automated MSC Manufacturing TABLE 7.12: Higher Throughput in Partially Automated Facilities 107	92 g 105	
TABLE 7.2: (CONTINUED) 89  TABLE 7.2: (CONTINUED) 90  TABLE 7.2: (CONTINUED) 91  TABLE 7.3: Main Features of Commercially Available Bioreactors  TABLE 7.4: Microcarriers for the Expansion of MSCs 94  TABLE 7.4: (CONTINUED) 95  TABLE 7.5: Basic Assays for MSCs 98  TABLE 7.6: Cell Surface Markers on MSCs and Fibroblasts 99  TABLE 7.7: Cost of Manufacturing Allogeneic MSCs 100  TABLE 7.8: Cost of Manufacturing Autologous MSCs 101  TABLE 7.9: Cost of Goods (CoG) in MSC Manufacturing 102  TABLE 7.10: CoG Breakdown in Partially-Automated MSC Manufacturing TABLE 7.11: Higher Throughput in Partially Automated Facilities 107  TABLE 8.1: Key Processes and Cost Assumptions 109	92 g 105	
TABLE 7.2: (CONTINUED) 89  TABLE 7.2: (CONTINUED) 90  TABLE 7.2: (CONTINUED) 91  TABLE 7.3: Main Features of Commercially Available Bioreactors  TABLE 7.4: Microcarriers for the Expansion of MSCs 94  TABLE 7.4: (CONTINUED) 95  TABLE 7.5: Basic Assays for MSCs 98  TABLE 7.6: Cell Surface Markers on MSCs and Fibroblasts 99  TABLE 7.7: Cost of Manufacturing Allogeneic MSCs 100  TABLE 7.8: Cost of Manufacturing Autologous MSCs 101  TABLE 7.9: Cost of Goods (CoG) in MSC Manufacturing 102  TABLE 7.10: CoG Breakdown in Partially-Automated MSC Manufacturing  TABLE 7.11: CoG Breakdown in Fully Automated MSC Manufacturing  TABLE 7.12: Higher Throughput in Partially Automated Facilities 107  TABLE 8.1: Key Processes and Cost Assumptions 109  TABLE 8.2: Quality Control Panels and Cost Assumptions	92 g 105	
TABLE 7.2: (CONTINUED) 89  TABLE 7.2: (CONTINUED) 90  TABLE 7.2: (CONTINUED) 91  TABLE 7.3: Main Features of Commercially Available Bioreactors  TABLE 7.4: Microcarriers for the Expansion of MSCs 94  TABLE 7.4: (CONTINUED) 95  TABLE 7.5: Basic Assays for MSCs 98  TABLE 7.6: Cell Surface Markers on MSCs and Fibroblasts 99  TABLE 7.7: Cost of Manufacturing Allogeneic MSCs 100  TABLE 7.8: Cost of Manufacturing Autologous MSCs 101  TABLE 7.9: Cost of Goods (CoG) in MSC Manufacturing 102  TABLE 7.10: CoG Breakdown in Partially-Automated MSC Manufacturing TABLE 7.11: CoG Breakdown in Fully Automated MSC Manufacturing TABLE 7.12: Higher Throughput in Partially Automated Facilities 107  TABLE 8.1: Key Processes and Cost Assumptions 109  TABLE 8.2: Quality Control Panels and Cost Assumptions 110  TABLE 8.3: Additional Supporting Labor Cost Assessments 110	92 g 105	
TABLE 7.2: (CONTINUED) 89  TABLE 7.2: (CONTINUED) 90  TABLE 7.2: (CONTINUED) 91  TABLE 7.3: Main Features of Commercially Available Bioreactors  TABLE 7.4: Microcarriers for the Expansion of MSCs 94  TABLE 7.4: (CONTINUED) 95  TABLE 7.5: Basic Assays for MSCs 98  TABLE 7.6: Cell Surface Markers on MSCs and Fibroblasts 99  TABLE 7.7: Cost of Manufacturing Allogeneic MSCs 100  TABLE 7.8: Cost of Manufacturing Autologous MSCs 101  TABLE 7.9: Cost of Goods (CoG) in MSC Manufacturing 102  TABLE 7.10: CoG Breakdown in Partially-Automated MSC Manufacturing TABLE 7.11: CoG Breakdown in Fully Automated MSC Manufacturing TABLE 7.12: Higher Throughput in Partially Automated Facilities 107  TABLE 8.1: Key Processes and Cost Assumptions 109  TABLE 8.2: Quality Control Panels and Cost Assumptions 110  TABLE 8.3: Additional Supporting Labor Cost Assessments 110  TABLE 8.3: (CONTINUED) 111	92 g 105	
TABLE 7.2: (CONTINUED) 89  TABLE 7.2: (CONTINUED) 90  TABLE 7.2: (CONTINUED) 91  TABLE 7.3: Main Features of Commercially Available Bioreactors  TABLE 7.4: Microcarriers for the Expansion of MSCs 94  TABLE 7.4: (CONTINUED) 95  TABLE 7.5: Basic Assays for MSCs 98  TABLE 7.6: Cell Surface Markers on MSCs and Fibroblasts 99  TABLE 7.7: Cost of Manufacturing Allogeneic MSCs 100  TABLE 7.8: Cost of Manufacturing Autologous MSCs 101  TABLE 7.9: Cost of Goods (CoG) in MSC Manufacturing 102  TABLE 7.10: CoG Breakdown in Partially-Automated MSC Manufacturing TABLE 7.11: CoG Breakdown in Fully Automated MSC Manufacturing TABLE 7.12: Higher Throughput in Partially Automated Facilities 107  TABLE 8.1: Key Processes and Cost Assumptions 109  TABLE 8.2: Quality Control Panels and Cost Assumptions 110  TABLE 8.3: Additional Supporting Labor Cost Assessments 110	92 g 105	
TABLE 7.2: (CONTINUED) 89  TABLE 7.2: (CONTINUED) 90  TABLE 7.2: (CONTINUED) 91  TABLE 7.3: Main Features of Commercially Available Bioreactors  TABLE 7.4: Microcarriers for the Expansion of MSCs 94  TABLE 7.4: (CONTINUED) 95  TABLE 7.5: Basic Assays for MSCs 98  TABLE 7.6: Cell Surface Markers on MSCs and Fibroblasts 99  TABLE 7.7: Cost of Manufacturing Allogeneic MSCs 100  TABLE 7.8: Cost of Manufacturing Autologous MSCs 101  TABLE 7.9: Cost of Goods (CoG) in MSC Manufacturing 102  TABLE 7.10: CoG Breakdown in Partially-Automated MSC Manufacturing TABLE 7.11: CoG Breakdown in Fully Automated MSC Manufacturing TABLE 7.12: Higher Throughput in Partially Automated Facilities 107  TABLE 8.1: Key Processes and Cost Assumptions 109  TABLE 8.2: Quality Control Panels and Cost Assumptions 110  TABLE 8.3: Additional Supporting Labor Cost Assessments 110  TABLE 8.4: Additional Supporting Facility and Cost Assumptions 111  TABLE 8.4: (CONTINUED) 112  TABLE 9.1: Large-Scale Expansion of MSCs by Method, Cell Source and Cost Assumptions Cost Assumptions 111	92 g 105 106	
TABLE 7.2: (CONTINUED) 89 TABLE 7.2: (CONTINUED) 90 TABLE 7.2: (CONTINUED) 91 TABLE 7.3: Main Features of Commercially Available Bioreactors TABLE 7.4: Microcarriers for the Expansion of MSCs 94 TABLE 7.4: (CONTINUED) 95 TABLE 7.5: Basic Assays for MSCs 98 TABLE 7.6: Cell Surface Markers on MSCs and Fibroblasts 99 TABLE 7.7: Cost of Manufacturing Allogeneic MSCs 100 TABLE 7.8: Cost of Manufacturing Autologous MSCs 101 TABLE 7.9: Cost of Goods (CoG) in MSC Manufacturing 102 TABLE 7.10: CoG Breakdown in Partially-Automated MSC Manufacturing TABLE 7.11: CoG Breakdown in Fully Automated MSC Manufacturing TABLE 7.12: Higher Throughput in Partially Automated Facilities 107 TABLE 8.1: Key Processes and Cost Assumptions 109 TABLE 8.2: Quality Control Panels and Cost Assumptions 110 TABLE 8.3: Additional Supporting Labor Cost Assessments 110 TABLE 8.4: Additional Supporting Facility and Cost Assumptions 111 TABLE 8.4: (CONTINUED) 112 TABLE 9.1: Large-Scale Expansion of MSCs by Method, Cell Source an TABLE 9.1: (CONTINUED) 115	92 g 105 106	
TABLE 7.2: (CONTINUED) 89  TABLE 7.2: (CONTINUED) 90  TABLE 7.2: (CONTINUED) 91  TABLE 7.3: Main Features of Commercially Available Bioreactors  TABLE 7.4: Microcarriers for the Expansion of MSCs 94  TABLE 7.4: (CONTINUED) 95  TABLE 7.5: Basic Assays for MSCs 98  TABLE 7.6: Cell Surface Markers on MSCs and Fibroblasts 99  TABLE 7.7: Cost of Manufacturing Allogeneic MSCs 100  TABLE 7.8: Cost of Manufacturing Autologous MSCs 101  TABLE 7.9: Cost of Goods (CoG) in MSC Manufacturing 102  TABLE 7.10: CoG Breakdown in Partially-Automated MSC Manufacturing TABLE 7.11: CoG Breakdown in Fully Automated MSC Manufacturing TABLE 7.12: Higher Throughput in Partially Automated Facilities 107  TABLE 8.1: Key Processes and Cost Assumptions 109  TABLE 8.2: Quality Control Panels and Cost Assumptions 110  TABLE 8.3: Additional Supporting Labor Cost Assessments 110  TABLE 8.4: Additional Supporting Facility and Cost Assumptions 111  TABLE 8.4: (CONTINUED) 112  TABLE 9.1: Large-Scale Expansion of MSCs by Method, Cell Source and Cost Assumptions Cost Assumptions 111	92 92 9105 106 d Media 114	119

\_\_\_\_\_

```
TABLE 10.1: Comparison of Capacity Trends, 2018-2021
                                                             125
TABLE 10.2: Current Distribution of Capacity by Facility Size
                                                            126
TABLE 10.3: Global Bioprocessing Capacity by Region/Country 127
TABLE 10.4: Top Global CDMOs
                                      128
TABLE 10.5: GMP Capacities of U.S-based Contract Manufacturers
TABLE 10.6: Major Cell & Gene Therapy Contract Manufacturers in Europe
                                                                            129
TABLE 10.7: GMP Manufacturing Facilities for Cell and Gene Therapies in U.K., 2022
                                                                                   130
TABLE 10.7: (CONTINUED)
TABLE 10.8: U.K. Cleanroom Footprint for Cell & Gene Therapy Manufacturing 132
TABLE 10.9: Countries Outsourcing Cell & Gene Therapy Services from U.K. by Country 135
TABLE 11.1: Select MSC-Based Clinical Trials for Autoimmune Diseases 137
TABLE 11.2: Select MSC-Based Clinical Trials for Cardiovascular Studies
TABLE 11.3: Select MSC-Based Studies using MSCs for Neurodegenerative Diseases
                                                                                   139
TABLE 11.4: Select MSC-Based Studies for Bone & Cartilage Diseases 140
TABLE 11.5: Ongoing Studies using MSCs for GvHD
TABLE 11.6: Examples of Ongoing Clinical Trials using MSCs for Crohn's Disease
                                                                                   141
TABLE 11.7: Examples of Ongoing Clinical Trials using MSCs for Type 1 Diabetes
                                                                                   142
TABLE 11.8: Examples of Currently Ongoing Clinical Trials using MSCs for SLE 142
TABLE 11.9: Examples of Ongoing Clinical Trials using MSCs for PD
TABLE 11.10: Examples of Currently Ongoing Clinical Trials using MSCs for AD 143
TABLE 11.11: Examples of Ongoing Clinical Trials using MSCs for Kidney Failure
                                                                                   144
TABLE 11.12: Examples of Ongoing Clinical Trials using MSCs for SCI 144
TABLE 11.13: Examples of Currently Ongoing Clinical Trials using MSCs for SCI 145
TABLE 12.1: Clinical Trials Involving Engineered MSCs 147
TABLE 12.2: Primed MSCs in Clinical Trials
TABLE 12.3: Scaffold-Based MSCs in Clinical Trials
                                                     149
TABLE 12.3: (CONTINUED)
                              150
TABLE 12.4: Clinical Trials Involving MSC-Derived Exosomes
TABLE 12.5: Commercially Available Products Incorporated with Secretomes
                                                                            152
TABLE 12.5: (CONTINUED)
                              153
TABLE 12.5: (CONTINUED)
                              154
TABLE 12.6: MSC Products with Marketing Approval
                                                     155
TABLE 12.6: (CONTINUED)
                              156
TABLE 12.7: Marketed MSC-Containing Bone Matrices 160
TABLE 14.1: Price Tags of MSC-Based Approved CT Products 176
TABLE 14.2: Price Tags of Select MSC Progenitor-Based Products
                                                                    177
TABLE 14.3: Global Market for MSC-Based Therapeutics
                                                             180
TABLE 14.4: Global Market for MSCs by Geography, 2022-2030 183
TABLE 15.1: Ambulero's Product Pipeline
                                             202
TABLE 15.2: BioCardia's Advanced Pipeline
                                             219
TABLE 15.3: Bonus Biogroup's Product Pipeline 228
TABLE 15.4: BrainStorm's Product Pipeline
                                             229
TABLE 15.5: CardioCell's Clinical Development 232
TABLE 15.6: Celltex's Clinical Trials
TABLE 15.7: Corestem's Product Pipeline
                                             243
TABLE 15.8: Cynata's Product Pipeline 248
TABLE 15.9: Regulatory Proteins found in ExoFlo
                                                     253
TABLE 15.10: Hope's Clinical Trial Pipeline
                                             265
TABLE 15.11: Growth Factors in XoGlo and XoGlo Plus 271
TABLE 15.12: Mesoblast's Late-Stage Clinical Pipeline 288
TABLE 15.13: Pluristem's Clinical Pipeline
                                             304
TABLE 15.14: Regeneus' Product Pipeline
                                             307
TABLE 15.15: Sentien's Product Pipeline
                                             323
TABLE 15.16: Stemedica's Clinical Pipeline
                                             327
TABLE 15.17: Stempeutics' Product Candidates in Clinical Trials 331
```

## **About BioInformant:** As the first and only market research firm to specialize in the stem cell industry, BioInformant research has been cited by the Wall Street Journal, Nature Biotechnology, Xconomy, and Vogue Magazine. Serving Fortune 500 companies that include Pfizer, GE Healthcare, and Goldman Sachs, BioInformant is your global leader in stem cell industry data. To learn more, visit BioInformant.com. **BioInformant Worldwide, LLC** BioInformant.com