



**Global and China Stem Cell Industry
Report, 2014-2017**

Sep. 2014

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

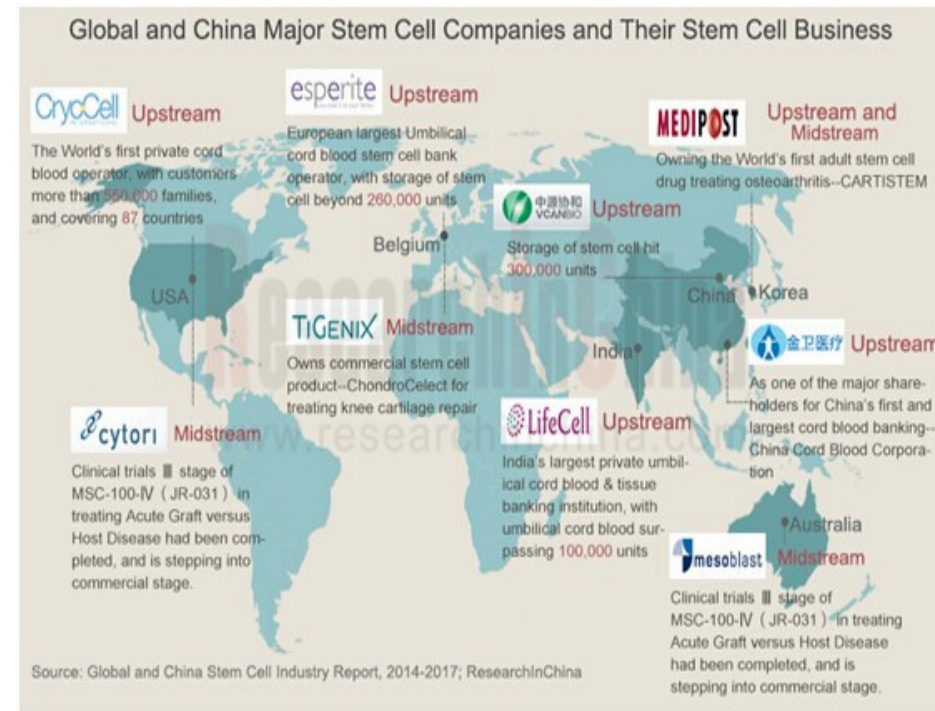
INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

Stem cells are undifferentiated biological cells that can differentiate into specialized cells and can divide (through mitosis) to produce more stem cells. Stem cell therapy can be applied to treatment of cardiovascular diseases, leukemia (a kind of hematological system disease), nervous system diseases, damage or lesion of liver, kidney and other parenchymal organs, etc..

Currently, cord blood bank is the fastest-growing and relatively mature market amid stem cell upstream sectors and even the whole industry chain. In 2005, there were 23 cord blood banks worldwide and in 2013 the figure exceeded 480. Global cord blood stem cell (CBSC) storage companies can be roughly divided into two categories: the ones running in a globalized business model, such as Cryo-Cell International and Esperite (formerly known as Cryo-Save Group), and the others giving priority to regional operation e.g. Zhongyuan Union Stem Cell Bioengineering (VCANBIO), Golden Meditech and LifeCell International. However, the companies mainly engaged in cord blood bank business are currently small in scale, only a few with more than 500,000 clients.



The stem cell technology and product research-oriented midstream sector is in its infancy, mostly concentrated in few countries like Europe, America and South Korea. At present, most companies in the industry chain are basically in the red for years running due to huge R&D costs. Nevertheless, attracted by the tremendous market potential in the area of stem cell therapy and enjoying the great encouragement from government policies (e.g. capital subsidy) and the capital support of significant cooperative partners, very few companies have dropped out.

Up to now, altogether 9 sorts of stem cell products have been approved worldwide, 3 of which are in the category of stem cell drugs developed by S. Korean companies, such as MEDIPOST's adult stem cell drug CARTISTEM for osteoarthritis treatment and the stem cell product Prochymal (MEDIPOST obtained the product via acquiring the Therapeutics business of Osiris Therapeutics) direct at treating children suffering acute graft-versus-host disease (GVHD).

In the meantime, traditional pharmaceutical giants like Novartis are setting about quickly accessing the field through mergers and acquisitions. On Aug. 19, 2014, Novartis reached an acquisition agreement with Gamida Cell (a corporate dedicated to stem cell technology R&D and its application in stem cell transplantation for leukemia patients), which specified that Novartis spend USD35 million in acquiring 15% equity in the latter and win the option to take over the remaining equity in two years with USD165 million; in Sep. 2013, Novartis also entered a cooperation with Regenerex to jointly develop the hematopoietic stem cell platform FCRx of the latter.

Global and China Stem Cell Industry Report, 2014-2017 highlights the followings:

- ⇒ Classification, application, industry chain definition, etc. of stem cells;
- ⇒ Major enterprises, policies, upstream/midstream/downstream development and prospects, etc. of global stem cell industry;
- ⇒ Policies, upstream/midstream/downstream development, etc. of China stem cell industry;
- ⇒ Operation, stem cell business, etc. of 6 upstream companies and 18 midstream/downstream companies worldwide.

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