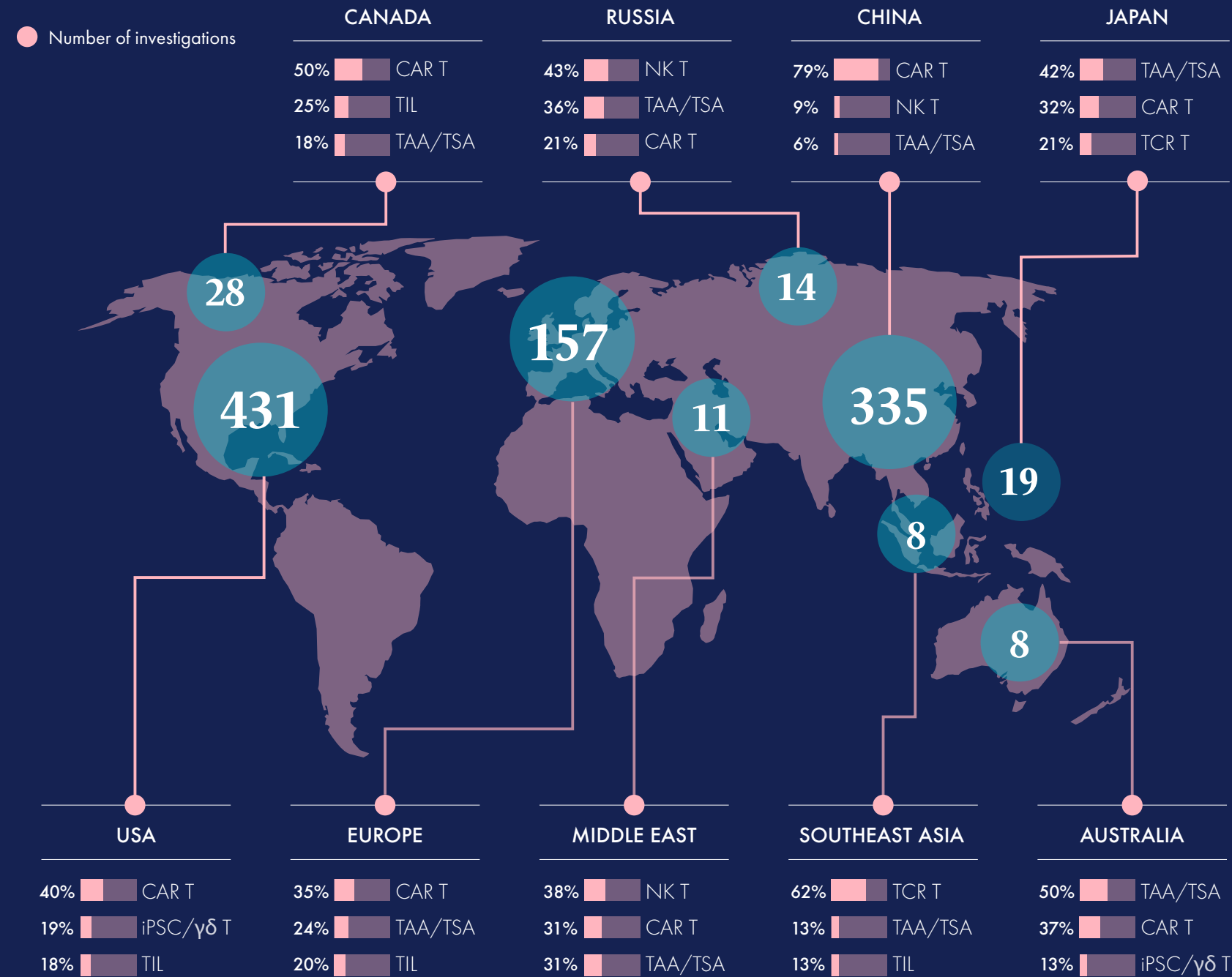


# CELL THERAPY TAKEOVER

Over the past year investigation into cell therapies has grown markedly, with an estimated 80% increase; the US and China are taking the lead in the development of these therapies, with Europe the closest behind.

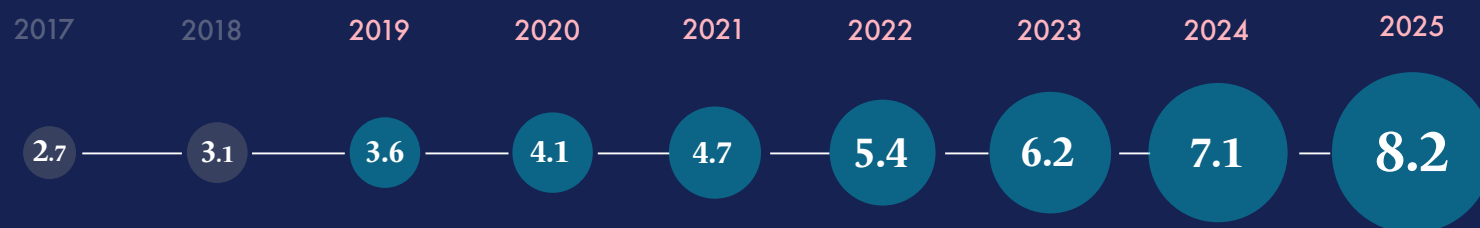
## INVESTIGATION OF CELL THERAPIES WORLDWIDE AND THE THREE MOST COMMON TYPES IN EACH REGION/COUNTRY

Source: Deloitte analysis, 2018



## PROJECTED GLOBAL CELL THERAPY MARKET GROWTH (\$ BN) 2017-2025

Source: Frost & Sullivan, 2018



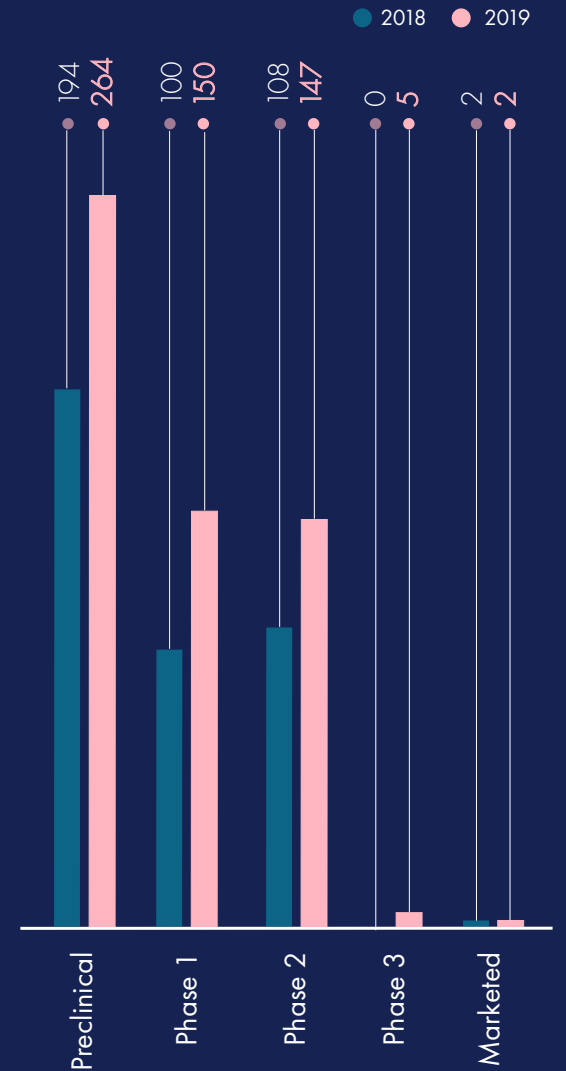
# TRENDS IN CAR T CELL THERAPIES

## NUMBER OF TARGETS PURSUED IN CAR T CELL THERAPY (as of March 2019)



Source: Nature, 2019

## GROWTH IN THE CAR T CELL THERAPY PIPELINE<sup>s</sup> (March 2018 - March 2019)



Source: Nature, 2019

## NUMBER OF CAR T CELL THERAPY CLINICAL TRIALS

Source: ClinicalTrials.gov, 2019

