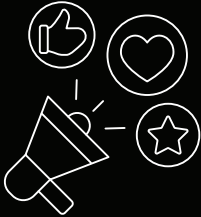


Launching soon: 2024 state of the Advanced Therapy industry report

Deloitte conducted the second annual Advanced Therapy (AT) industry survey—on cell, gene, and other transformative therapies—to uncover what industry leaders believe are the headwinds and tailwinds that are poised to shape the industry. More than 350 respondents from across the value chain—advanced therapies developers (ATDs), advanced therapies manufacturing organizations (ATMOs), health care providers, and payers—were surveyed across a variety of functions: R&D and clinical operations, manufacturing, supply chain and quality, commercial operations, market access/patient services, digital, and regulatory affairs.



The results? A positive outlook.

More than 80% of Advanced Therapy leaders surveyed felt optimistic about the performance of the industry in the past 12–18 months, and **nearly 90% expressed a positive outlook** for the next 12–18 months—both answers consistent with last year's outlook. Explore the highlights below to see key takeaways across functions.



ATD growth strategies:

More than 30% of ATDs are actively considering partnerships for growth. Almost a quarter of the respondents demonstrate a high level of interest for RNA-based therapies, as opposed to only 1% for induced pluripotent stem cells. Radiopharmacy was an emerging area of interest with 8% of respondents.



Factors for successful clinical trials:

Optimizing trial design and maximizing patient recruitment and retention continue to be issues of concern for clinical organizations. Surprisingly, site selection has decreased in concern compared to last year. This could be a result of having sufficient experienced treatment centers to meet demand, yet many organizations continue to struggle with meeting patient enrollment numbers in the clinical setting.



Manufacturing challenges:

Nearly 90% of ATDs have contracted with external manufacturing organizations, a 30% increase from last year.



Artificial intelligence:

More than two-thirds of all ATDs and ATMOs have established an AI strategy. The trend is mostly driven by increased interest in Generative AI capabilities; however, the value of which remains nebulous.



Main barrier for commercialization:

While "payer and reimbursement challenges" remains the top force affecting the commercialization of advanced therapies in the next 12–18 months, this year it tied with "improved manufacturing technology," underscoring a push towards consistency and lower cost of goods sold.



Regulatory ambiguity: Manufacturing continues to be at the top of the list in terms of areas of regulatory ambiguity in the AT value chain.



Critical factors for patient access:

Whereas reimbursement challenges continue to be a major barrier for patient access, treatment center capacity and constraints was a surprise close second.

Hussain Mooraj
Principal
Deloitte Consulting LLP
+1 508 561 9266
hmooraj@deloitte.com

Amit Agarwal
Managing Director
Deloitte Consulting LLP
+1 415 783 6691
amitaragwal2@deloitte.com

Jessica Faust
Managing Director
Deloitte Consulting LLP
+1 617 813 4259
jfaust@deloitte.com

Rajesh Singh
Managing Director
Deloitte Consulting LLP
+1 973 602 6296
rajeshsingh@deloitte.com

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