

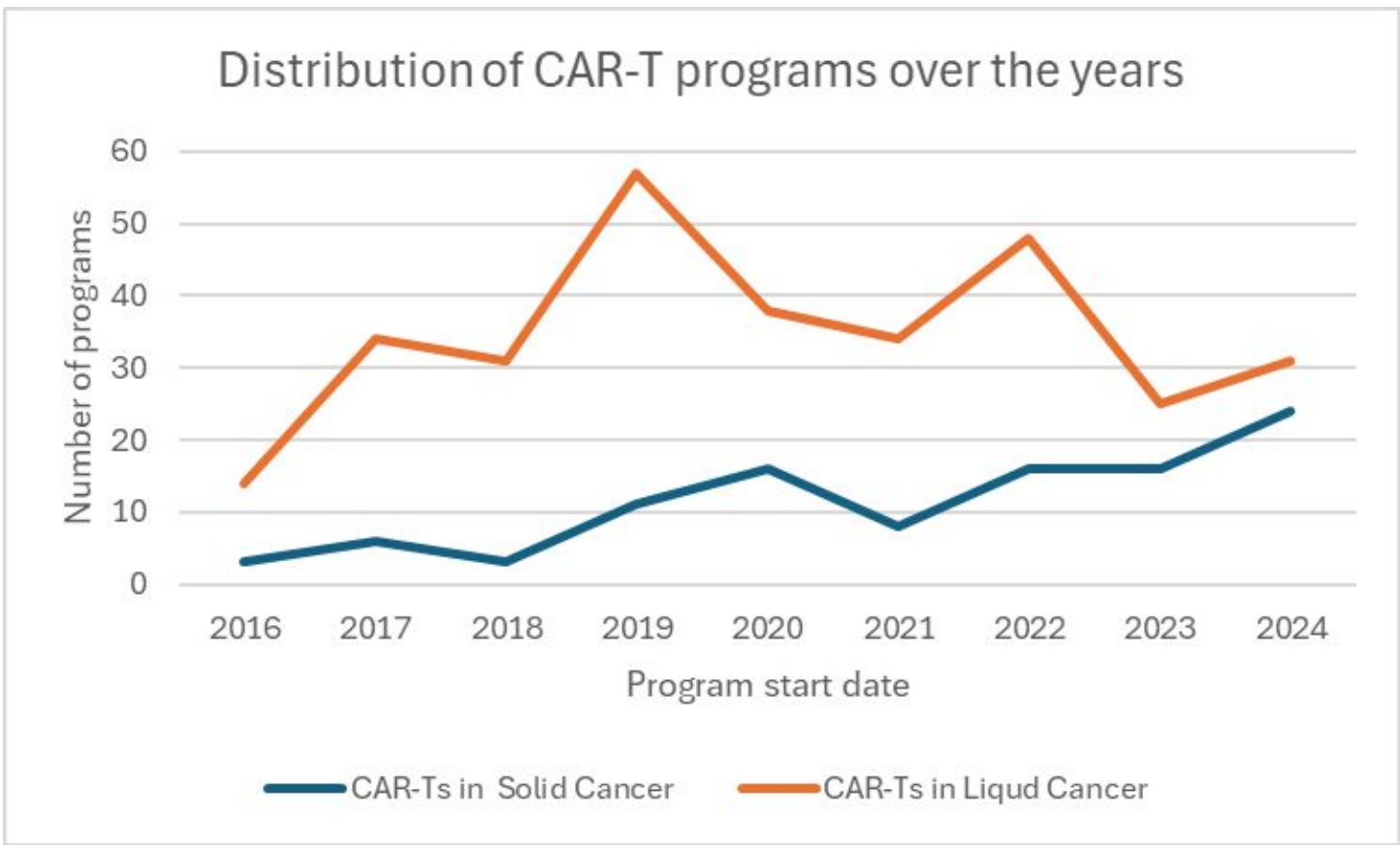
CAR-T in Solid Tumors: The Shift Is Closer Than It Appears

From Breakthrough to Plateau: CAR-T’s First Chapter

Chimeric Antigen Receptor T-cell (CAR-T) therapy remains one of the most transformative innovations in oncology. Known for its precision targeting and durability of response, CAR-T has redefined treatment possibilities—particularly in hematologic malignancies, where multiple therapies have secured approval and demonstrated life-extending benefit in relapsed or refractory patients.

Historically, CAR-T development has focused almost exclusively on **liquid cancers**, where access to target cells is more straightforward and tumor microenvironments are less suppressive. The field has grown rapidly, but in recent years, **clinical activity in liquid tumors has plateaued**, and new programs appear to be leveling off.

Solid Tumors Step Into the Spotlight



Our proprietary clinical trial dataset captures the **ripple effects** of this regulatory disruption.

What’s now emerging—and less often discussed—is a **significant and sustained rise in CAR-T programs for solid tumors**. Based on our analysis of clinical program initiations from 2016 to 2024:

- While liquid tumor programs still lead in total volume, the number of new solid tumor-focused CAR-T programs has increased more than **5-fold** over that period.
- In **2023 and 2024**, the annual number of new solid tumor CAR-T programs is approaching parity with those in liquid cancers.
- This marks a **strategic reorientation** in clinical investment, not yet reflected in regulatory approvals—but clearly visible in trial pipelines.

Despite continued skepticism about feasibility in solid cancers—owing to challenges such as **tumor heterogeneity, immune suppression and target accessibility**—the trend data suggests that a **Phase 3 trial in a solid tumor setting may be closer than anticipated**. To date, **no such program has reached Phase 3**, but the growth curve suggests that **critical mass may soon be achieved**.

Seizing the Inflection Point

For portfolio leaders and clinical strategists, this trend presents a narrow window of opportunity:

- **Early engagement** in solid tumor CAR-T could provide first-mover advantage in shaping regulatory expectations and clinical endpoints.
- **Cross-functional planning** (CMC, trial design, site selection) will be critical to overcome technical barriers in solid tumor deployment.

Acting Ahead of the Curve

Our SaaS suite of solutions supports decision-makers with:

- **Modality-specific development benchmarks**, including transition probabilities and attrition patterns across tumor types, helping portfolio teams **set realistic expectations, prioritize high-yield programs, and avoid investing in weak benchmarks**.
- **Predictive success modeling** to estimate program viability based on trial design, indication, and sponsor profile, enabling sponsors to **make smarter go/no-go decisions, reallocate resources earlier, and reduce late-stage risk**.
- **Signal detection** for inflection points in trial volume, endpoint use, and regulatory engagement. We surface information when modalities like CAR-Ts in solid tumors **shift from exploratory to investable—so you can act ahead of the curve, not behind it**.

Solid tumor CAR-T isn’t just a long-term bet—it’s an active transition zone.

Knowing when to move is what separates trend followers from market leaders.