

Global Oligonucleotide Conjugates Market Research Report 2026(Status and Outlook)

<https://marketpublishers.com/r/G0E04A932C1BEN.html>

Date: March 2026

Pages: 161

Price: US\$ 2,980.00 (Single User License)

ID: G0E04A932C1BEN

Abstracts

Oligonucleotide conjugates (OCs) are a novel class of biomolecules formed by covalently binding oligonucleotide chains to functional molecules (such as small molecule drugs, antibodies, peptides, lipids, carbohydrates, and fluorescent probes) using chemical linking techniques. The core principle is to leverage the sequence-specific targeting capabilities of oligonucleotides and the functional advantages of the conjugate molecules to achieve a synergistic effect of "targeted delivery + precise action." These molecules combine the targeting precision of oligonucleotides with the functional diversity of the conjugate components, making them core carriers in gene therapy and precision diagnostics, and widely used in the treatment and detection of tumors, rare diseases, and infectious diseases. The global oligonucleotide conjugates market is experiencing rapid growth driven by the explosive demand from gene therapy and precision medicine, with its size and growth rate deeply tied to breakthroughs in delivery technology and drug commercialization. The oligonucleotide conjugate market is currently experiencing a golden age of rapid growth. The core drivers of growth come from two aspects: firstly, technological iterations have overcome application bottlenecks; the maturity of liver-targeted conjugate technology has propelled the commercialization of the first siRNA drug, Leqvio (inclisiran). Secondly, clinical pipelines are progressing rapidly, with over 80 oligonucleotide conjugates (OOCs) in clinical trials globally. Among these, three OOCs have entered Phase III clinical trials and are expected to launch in 2026-2027, triggering a significant market expansion. In terms of product type, GalNAc conjugates, due to their specific binding to the ASGPR receptor on hepatocytes, have become the preferred technology for liver-related diseases, accounting for 51% of the gene therapy conjugate market. AOCs, combining the targeting ability of antibodies with the gene regulation capabilities of oligonucleotides, have become key to unlocking extrahepatic tissue delivery, with a market growth rate exceeding 37% by 2025. The upstream of the industry chain focuses on the supply of high-purity oligonucleotide raw

materials and functional conjugate molecules, with core technologies monopolized by international giants. Domestic companies are accelerating breakthroughs in achieving self-sufficiency in raw materials and conjugation reagents. The midstream is centered on CDMO services, with international giants Novartis and Alnylam dominating the commercial market with blockbuster products like Inccilan and Patigrelan. Domestic company Jiajin Bio is advancing its pipeline layout based on its independent technology platform. Downstream demand is concentrated in therapeutic areas such as oncology, rare diseases, and infectious diseases, as well as precision diagnostics. Gene therapy dominates the downstream market, and conjugate technology has solved the targeting and safety challenges of gene therapy, achieving breakthroughs in rare diseases and oncology. In the field of hereditary diseases, GalNAc-oligonucleotide conjugates have been approved for marketing in the treatment of acute hepatic porphyria; in the oncology field, AOCs can target Her2 and TROP2 antigens, delivering siRNA to silence oncogenes in cancer cells.

The global Oligonucleotide Conjugates market size was estimated at USD 169.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 40.40% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Oligonucleotide Conjugates market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Oligonucleotide Conjugates market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Oligonucleotide Conjugates market.

Global Oligonucleotide Conjugates Market: Market Segmentation Analysis

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

Key Company

WuXi TIDES
Bachem
Lonza
BioSpring
GenScript
Medtide (CPC Scientific)
Kaneka Corporation (Eurogentec)
Olon (GTP Bioways)
Abzena
3PBIOVIAN
Bio-Synthesis Inc
ChemExpress
Creative Biolabs
HitGen
Pharmaron
Suzhou Biosyntech
Creative Biogene (IntegrateRNA)

Market Segmentation (by Type)

Oligonucleotide-Peptide
Oligonucleotide-Antibody

Oligonucleotide-Lipid
Oligonucleotide-Toxin
Oligonucleotide-GalNAc
Other

Market Segmentation (by Application)

Gene Therapy
Drug Delivery
Vaccine Development

Geographic Segmentation

North America (USA, Canada, Mexico)
Europe (Germany, UK, France, Russia, Italy, Rest of Europe)
Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)
South America (Brazil, Argentina, Columbia, Rest of South America)
The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study
Neutral perspective on the market performance
Recent industry trends and developments
Competitive landscape & strategies of key players
Potential & niche segments and regions exhibiting promising growth covered
Historical, current, and projected market size, in terms of value
In-depth analysis of the Oligonucleotide Conjugates Market
Overview of the regional outlook of the Oligonucleotide Conjugates Market:

Customization of the Report

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Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division

standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Oligonucleotide Conjugates Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Oligonucleotide Conjugates, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

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