

Global Antibody-oligonucleotide Conjugates (AOCs) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Antibody-oligonucleotide Conjugates (AOCs) market size is expected to reach \$ million by 2032, rising at a market growth of %CAGR during the forecast period (2026-2032).

AOCs (Antibody-Oligonucleotide Conjugates) consist of three main components: a carrier (antibody), a linker, and a small nucleic acid. They allow for targeted delivery, combining the antibody's ability to bind to specific cells with the gene-silencing capability of small nucleic acids, addressing the delivery challenges faced by conventional small nucleic acid drugs.

The development of Antibody-Oligonucleotide Conjugates (AOCs) aims to address the inherent limitations of small nucleic acids, such as poor serum stability, low membrane permeability, and lack of tissue selectivity. AOCs combine the longer half-life and precise targeting capabilities of antibodies with the gene-silencing power of small nucleic acids, achieving high-precision selectivity and effective delivery to target cells.

The global Antibody-oligonucleotide Conjugates (AOCs) market is experiencing explosive growth, with the core driving force coming from clinical breakthroughs in rare diseases (such as Duchenne muscular dystrophy and myotonic dystrophy) and innovative needs for targeted tumor therapy. Leading companies Avidity Biosciences (AOC 1001 clinical phase II) and Dyne Therapeutics (FORCE™ platform) are leading the race. On the technical side, pH-sensitive linkers optimize oligonucleotide release and bispecific antibody design improves tissue penetration, but low lysosomal escape efficiency (

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