

# Global Circular RNA Generation Technology Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Circular RNA Generation Technology market size is expected to reach \$ 543 million by 2032, rising at a market growth of 27.1% CAGR during the forecast period (2026-2032).

Circular RNA generation technology comprises the methods and process systems used to produce covalently closed circular RNA through sequence design, DNA template construction, in vitro transcription, ribozyme-mediated self-splicing, enzymatic ligation, intracellular splicing, or vector-mediated expression. A complete manufacturing workflow generally includes precursor RNA design, transcription, circularization, removal of residual linear RNA and double-stranded RNA impurities, chromatographic purification, concentration and buffer exchange, structural confirmation, purity testing, expression activity evaluation, and delivery formulation development. Upstream inputs mainly include nucleotide triphosphates, modified nucleosides, DNA and plasmid templates, RNA polymerases, T4 RNA ligases, ribozyme elements, nucleases, buffers, chromatography media, ultrafiltration consumables, single-use bioprocessing materials, analytical reagents, and lipid nanoparticle materials. Downstream customers include RNA drug developers, vaccine companies, gene and cell therapy companies, pharmaceutical companies, CRO/CDMO providers, research institutes, and hospital research centers. The industry's gross margin in 2025 is estimated at approximately 45%-65%.

The circular RNA generation technology market is currently transitioning from a research-tool market into an enabling infrastructure market for RNA drug development. Research-grade custom synthesis, vector construction, and circularization kits continue to represent the basic demand base, while faster growth is occurring in process development, impurity control, analytical method establishment, and GMP

manufacturing. Suppliers can generally be divided into three groups: therapeutic developers with proprietary circularization platforms, life-science companies providing research-grade synthesis and kits, and RNA CRO/CDMO companies capable of producing clinical-grade drug substance and formulated products. The United States and China are currently the most active supply regions. Chinese companies have established a relatively broad presence in custom synthesis, process services, and integrated manufacturing, while U.S. companies are more active in proprietary platforms, technology licensing, and therapeutic translation.

Future technology development will shift from maximizing circularization yield alone toward the combined optimization of product integrity, scarless ligation, sequence flexibility, long-transcript compatibility, and manufacturing reproducibility. Conventional PIE approaches have a relatively mature research foundation, but may introduce residual foreign sequences and constrain some sequence designs. Enzymatic ligation approaches can provide more flexible or scarless products, but impose greater requirements on terminal structure, splint design, and enzyme cost. New intact-intron self-splicing, nickless circularization, and integrated circularization-purification technologies are emerging and may reduce impurity burdens and downstream purification complexity. In vitro and intracellular generation routes are expected to coexist, with the former offering better manufacturing control and the latter supporting sustained expression in gene therapy and in vivo cell-reprogramming applications.

Market growth is being driven by the development of next-generation RNA drugs, therapeutic vaccines, in vivo cell therapies, protein-replacement therapies, and genetic medicines. Once circular RNA programs advance into clinical development, demand expands beyond basic RNA synthesis to include high-purity drug substance, residual linear RNA and double-stranded RNA testing, structural characterization, translation-efficiency testing, aseptic production, and regulatory documentation. This substantially increases the value of each project. Downstream developers are also increasingly outsourcing sequence design, template preparation, circularization, purification, analytics, and LNP formulation to integrated suppliers in order to reduce technology-transfer risks and accelerate regulatory submissions. Entry by large pharmaceutical companies and expansion by specialist CDMOs are expected to support more standardized technical and supply-chain practices.

The main barriers are the lack of harmonized evaluation standards across circularization methods and the fact that a high circularization rate does not necessarily result in high purity, strong expression, or low immunogenicity. Uncircularized precursors, mis-ligated products, residual linear RNA, double-stranded RNA, truncated

transcripts, and residual DNA can all affect safety and biological activity, placing substantial demands on purification and analytical methods. Long-sequence circularization, batch reproducibility, manufacturing scale-up, enzyme costs, and limited regulatory standards remain major industrialization challenges. The patent landscape is also complex, with overlapping claims covering PIE systems, ligase methods, translation elements, purification processes, and delivery technologies, creating uncertainty around freedom to operate and commercial licensing.

This report studies the global Circular RNA Generation Technology demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Circular RNA Generation Technology, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Circular RNA Generation Technology that contribute to its increasing demand across many markets.

#### Highlights and key features of the study

Global Circular RNA Generation Technology total market, 2021-2032, (USD Million)

Global Circular RNA Generation Technology total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Circular RNA Generation Technology total market, key domestic companies, and share, (USD Million)

Global Circular RNA Generation Technology revenue by player, revenue and market share 2021-2026, (USD Million)

Global Circular RNA Generation Technology total market by Type, CAGR, 2021-2032, (USD Million)

Global Circular RNA Generation Technology total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Circular RNA Generation Technology market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include GenScript Biotech Corporation, Guangzhou Genesee Biotech, uBriGene Biosciences, Yaohai Bio-Pharma, Creative Biogene, SBS Genetech, Orna Therapeutics, RiboX Therapeutics, Sail Biomedicines, Shanghai CirCode Biomed, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Circular RNA Generation Technology market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Circular RNA Generation Technology Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Circular RNA Generation Technology Market, Segmentation by Type:

In Vitro Generation

Intracellular Generation

## Global Circular RNA Generation Technology Market, Segmentation by Circularization Method:

Ribozyme-Mediated Circularization

Enzymatic Ligation

Other

## Global Circular RNA Generation Technology Market, Segmentation by Ribozyme Route:

Group I Intron-Based

Group II Intron-Based

Other

## Global Circular RNA Generation Technology Market, Segmentation by Application:

Pharmaceutical and Biotechnology Companies

CRO and CDMO Companies

Other

## Companies Profiled:

GenScript Biotech Corporation

Guangzhou Geneseeed Biotech

uBriGene Biosciences

Yaohai Bio-Pharma

Creative Biogene

SBS Genetech

Orna Therapeutics

RiboX Therapeutics

Sail Biomedicines

Shanghai CirCode Biomed

Therorna

Circio Holding

Chimerna Therapeutics

Rznomics

#### Key Questions Answered

1. How big is the global Circular RNA Generation Technology market?
2. What is the demand of the global Circular RNA Generation Technology market?
3. What is the year over year growth of the global Circular RNA Generation Technology market?
4. What is the total value of the global Circular RNA Generation Technology market?
5. Who are the Major Players in the global Circular RNA Generation Technology market?
6. What are the growth factors driving the market demand?

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