

# Global Circular RNA Synthesis Service Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Circular RNA Synthesis Service market size is expected to reach \$ 234 million by 2032, rising at a market growth of 25.2% CAGR during the forecast period (2026-2032).

Circular RNA synthesis services provide integrated technical support for the design, production, purification, and quality control of customized circular RNA molecules based on customer-defined or jointly optimized target sequences. The typical service workflow includes circular RNA sequence design, DNA template construction, in vitro transcription, RNA circularization, purification, analytical testing, and optional lipid nanoparticle formulation and clinical-grade manufacturing. Major circularization routes include PIE self-splicing, modified scarless PIE methods, and T4 RNA ligase-mediated enzymatic ligation. Deliverables include research-grade circular RNA samples, preclinical drug substance, process-development packages, and GMP clinical batches. Upstream inputs mainly include nucleotide triphosphates, modified nucleosides, DNA and plasmid templates, RNA polymerases, RNA ligases, ribozyme elements, nucleases, buffers, chromatography media, ultrafiltration consumables, single-use bioprocessing materials, analytical reagents, and lipid materials, while downstream customers primarily include RNA drug developers, vaccine companies, gene and cell therapy companies, pharmaceutical companies, universities, research institutions, and hospital research centers. The overall industry gross margin typically around 40%-60%.

The circular RNA synthesis services market is still dominated by research-grade and preclinical projects, although demand is shifting from basic sample preparation toward sequence optimization, circularization process development, impurity control, analytical method establishment, and clinical manufacturing. The early market was primarily served by life-science tools and gene-synthesis companies supplying microgram- to

milligram-scale customized samples. As circular RNA drugs, vaccines, and in vivo cell therapy programs advance, several integrated RNA service providers are developing gram-scale production, lipid nanoparticle formulation, and GMP-compliant manufacturing capabilities. Global supply is currently concentrated in China and the United States. Chinese providers have established broad capabilities in research services, sequence analysis, circularization process development, and integrated CRDMO support, while U.S.-based providers generally benefit from broader international customer coverage and established nucleic acid manufacturing infrastructure.

Future competition will shift from demonstrating basic circularization capability toward reliably delivering high-purity, translatable, low-immunogenicity products that meet regulatory requirements. Competitive differentiation will increasingly depend on scarless circularization, long-sequence compatibility, process robustness across different payloads, removal of double-stranded RNA and linear precursors, batch reproducibility, and biological potency testing. Research-grade projects will continue to account for a large number of orders, but most value growth is expected to come from preclinical process development, GMP manufacturing, analytical validation, and LNP formulation. Suppliers with integrated capabilities covering sequence design, template preparation, circularization, purification, analytics, and formulation will be better positioned to retain projects as they progress toward clinical development.

Market growth is being driven by the expanding development of circular RNA therapeutics, therapeutic vaccines, protein-expression therapies, in vivo CAR-T, and other gene and cell therapy applications. Compared with building an internal small-scale production platform, outsourcing to specialized providers gives developers access to validated circularization elements, process expertise, analytical methods, and scale-up equipment, helping reduce development risk and shorten timelines to animal studies and regulatory submissions. As projects move from discovery into preclinical and clinical stages, additional testing for purity, integrity, residual DNA, double-stranded RNA, endotoxin, sterility, and potency increases the value of individual service contracts. Continued interest from large pharmaceutical companies in next-generation RNA technologies may also support greater demand for platform collaboration and outsourced manufacturing.

The main barriers are the lack of harmonized technical standards and differences in how suppliers measure circularization rate, purity, integrity, and expression activity, which make direct service comparison difficult. Conventional PIE methods may introduce residual sequences, sequence restrictions, and unwanted by-products, while

ligase-based methods face challenges related to enzyme cost, terminal design, and scale-up. Circularization efficiency, purification recovery, and batch consistency for long RNA sequences still require improvement. Clinical-grade production also requires more stringent raw-material controls, validated analytical methods, and quality standards. In addition, the limited number of clinical-stage downstream programs results in low GMP capacity utilization, exposing suppliers to high capital requirements, uneven order flow, and project cancellation risks.

This report studies the global Circular RNA Synthesis Service demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Circular RNA Synthesis Service, 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 Synthesis Service that contribute to its increasing demand across many markets.

#### Highlights and key features of the study

Global Circular RNA Synthesis Service total market, 2021-2032, (USD Million)

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

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

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

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

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

This report profiles major players in the global Circular RNA Synthesis Service 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, VectorBuilder, Guangzhou Genesee Biotech, uBriGene Biosciences, Yaohai Bio-Pharma, Creative Biogene, Creative Biolabs, BOC Sciences, 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 Synthesis Service 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 Synthesis Service Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Circular RNA Synthesis Service Market, Segmentation by Type:

Custom Synthesis

Process Development

Analytical and QC Services

Other

Global Circular RNA Synthesis Service Market, Segmentation by Circularization Method:

PIE Circularization

Enzymatic Ligation

Other

Global Circular RNA Synthesis Service Market, Segmentation by Product Format:

Naked circRNA

circRNA-LNP

Other

Global Circular RNA Synthesis Service Market, Segmentation by Application:

Pharmaceutical and Biotechnology Companies

CRO and CDMO Companies

Other

Companies Profiled:

GenScript Biotech Corporation

VectorBuilder

Guangzhou Geneseech Biotech

uBriGene Biosciences

Yaohai Bio-Pharma

Creative Biogene

Creative Biolabs

BOC Sciences

#### Key Questions Answered

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

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Figure 49. World Circular RNA Synthesis Service Market Size Market Share by Application in 2025

Figure 50. Pharmaceutical and Biotechnology Companies

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Figure 52. Other

Figure 53. World Circular RNA Synthesis Service Market Size Market Share by Application (2021-2032)

Figure 54. Circular RNA Synthesis Service Industrial Chain

Figure 55. Methodology

Figure 56. Research Process and Data Source

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