

Global Exogenous Circular RNA Synthesis Service Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Exogenous Circular RNA Synthesis Service market size was valued at US\$ 44.24 million in 2025 and is forecast to a readjusted size of US\$ 213 million by 2032 with a CAGR of 24.7% during review period.

Exogenous circular RNA synthesis services refer to specialized technical services that produce artificial circular RNA outside living cells based on customer-provided or jointly optimized sequences. The workflow typically includes DNA template construction, in vitro transcription, precursor RNA circularization, purification, analytical testing, and optional lipid nanoparticle formulation and clinical-grade manufacturing. The delivered RNA has already formed a covalently closed circular structure before being introduced into cells, tissues, or living organisms. Major circularization routes include PIE self-splicing, modified scarless PIE methods, and T4 RNA ligase-mediated enzymatic ligation. Deliverables include research-grade circRNA samples, preclinical drug substance, formulated samples, process-development packages, and GMP-compliant 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. Downstream customers primarily include RNA drug developers, vaccine companies, gene and cell therapy companies, pharmaceutical companies, universities, research institutes, and hospital research centers. Pricing is generally determined by sequence length, delivery scale, circularization method, purity grade, analytical requirements, formulation needs, and quality-system requirements. Research-grade projects are usually priced by sequence and quantity, while clinical and industrial projects are priced through process-

development and batch-manufacturing contracts. The industry's overall gross margin in 2025 is estimated at approximately 40%-60%.

The exogenous circular RNA synthesis services market is still dominated by research-grade and preclinical projects, although customer demand is expanding from basic circRNA sample preparation to sequence optimization, circularization screening, impurity removal, analytical method development, and delivery formulation. Early suppliers mainly delivered microgram- to milligram-scale research samples, while several integrated service providers have developed larger-scale production, LNP formulation, and clinical-grade quality systems. Global supply is concentrated mainly in China and the United States. Chinese providers have developed broad capabilities in circularization processes, research services, and integrated CRDMO support, while U.S.-based providers generally benefit from international customer coverage, standardized service models, and established nucleic acid development infrastructure. The market remains characterized by a limited supplier base, highly customized projects, and revenues concentrated in the development stage.

Future competition will shift from basic circularization capability toward high purity, scarless products, long-sequence compatibility, low immunogenicity, and reproducible scale-up. Conventional PIE methods have a relatively established application base but may face challenges involving junction scars, sequence restrictions, and by-product control. Modified scarless PIE and ligase-based approaches offer greater sequence flexibility but impose additional requirements on terminal structure, splint design, enzyme cost, and downstream purification. As customer programs enter clinical development, residual linear RNA, double-stranded RNA, truncated transcripts, free intron fragments, and residual DNA will become increasingly important quality attributes. Suppliers with proprietary analytical methods and biological potency testing capabilities will gain a stronger competitive position.

Market growth is being driven by expanding development activity in circular RNA therapeutics, therapeutic vaccines, protein-expression therapies, in vivo cell therapies, and gene-editing research. Compared with building internal in vitro transcription and circularization platforms, outsourcing gives developers access to validated templates, circularization elements, purification processes, and analytical systems, reducing development risk and shortening timelines to animal studies and regulatory submissions. As programs move from discovery to preclinical and clinical stages, additional testing for circularization efficiency, purity, integrity, residual DNA, double-stranded RNA, endotoxin, sterility, and potency expands the service scope and contract value. Providers offering integrated template production, circRNA drug substance, LNP

formulation, and quality studies will be better positioned to secure long-term projects.

The main barriers are the lack of harmonized quality and regulatory standards and differences in how suppliers measure circularization efficiency, purity, integrity, and expression activity. A high apparent circularization rate does not necessarily indicate high functional purity, because mis-ligated products, uncircularized precursors, double-stranded RNA, and truncated transcripts may affect expression and immune responses. Long-sequence circularization efficiency, purification recovery, and batch consistency remain technical challenges. Clinical-grade production also involves significant costs related to high-grade raw materials, quality validation, facility maintenance, and regulatory documentation. Because the number of clinical-stage exogenous circRNA programs remains limited, GMP capacity utilization and order continuity also constrain the stability of supplier profitability.

This report is a detailed and comprehensive analysis for global Exogenous Circular RNA Synthesis Service market. Both quantitative and qualitative analyses are presented by company, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Exogenous Circular RNA Synthesis Service market size and forecasts, in consumption value (\$ Million), 2021-2032

Global Exogenous Circular RNA Synthesis Service market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global Exogenous Circular RNA Synthesis Service market size and forecasts, by Type and by Application, in consumption value (\$ Million), 2021-2032

Global Exogenous Circular RNA Synthesis Service market shares of main players, in revenue (\$ Million), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Exogenous Circular RNA Synthesis Service

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Exogenous 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, etc.

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

Market segmentation

Exogenous Circular RNA Synthesis Service market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Type and by Application. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Custom Synthesis

Process Development

Analytical and QC Services

Other

Market segment by Circularization Method

PIE Circularization

Enzymatic Ligation

Other

Market segment by Product Format

Naked circRNA

circRNA-LNP

Other

Market segment by Application

Pharmaceutical and Biotechnology Companies

CRO and CDMO Companies

Other

Market segment by players, this report covers

GenScript Biotech Corporation

VectorBuilder

Guangzhou Geneseed Biotech

uBriGene Biosciences

Yaohai Bio-Pharma

Creative Biogene

Creative Biolabs

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

The content of the study subjects, includes a total of 13 chapters:

Chapter 1, to describe Exogenous Circular RNA Synthesis Service product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Exogenous Circular RNA Synthesis Service, with revenue, gross margin, and global market share of Exogenous Circular RNA Synthesis Service from 2021 to 2026.

Chapter 3, the Exogenous Circular RNA Synthesis Service competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Type and by Application, with consumption value and growth rate by Type, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and Exogenous Circular RNA Synthesis Service market forecast, by regions, by Type and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Exogenous

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