

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

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Abstracts

The global Exogenous Circular RNA Synthesis Service market size is expected to reach \$ 213 million by 2032, rising at a market growth of 24.7% CAGR during the forecast period (2026-2032).

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

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

Highlights and key features of the study

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

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

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

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

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

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

This report profiles major 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 Geneseeed 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Exogenous 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 Exogenous Circular RNA Synthesis Service Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Exogenous Circular RNA Synthesis Service Market, Segmentation by Type:

Custom Synthesis

Process Development

Analytical and QC Services

Other

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

PIE Circularization

Enzymatic Ligation

Other

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

Naked circRNA

circRNA-LNP

Other

Global Exogenous Circular RNA Synthesis Service Market, Segmentation by Application:

Pharmaceutical and Biotechnology Companies

CRO and CDMO Companies

Other

Companies Profiled:

GenScript Biotech Corporation

VectorBuilder

Guangzhou Geneseed Biotech

uBriGene Biosciences

Yaohai Bio-Pharma

Creative Biogene

Creative Biolabs

Key Questions Answered

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

Contents

1 SUPPLY SUMMARY

- 1.1 Exogenous Circular RNA Synthesis Service Introduction
- 1.2 World Exogenous Circular RNA Synthesis Service Market Size & Forecast (2021 & 2025 & 2032)
- 1.3 World Exogenous Circular RNA Synthesis Service Total Market by Region (by Headquarter Location)
 - 1.3.1 World Exogenous Circular RNA Synthesis Service Market Size by Region (2021-2032), (by Headquarter Location)
 - 1.3.2 United States Based Company Exogenous Circular RNA Synthesis Service Revenue (2021-2032)
 - 1.3.3 China Based Company Exogenous Circular RNA Synthesis Service Revenue (2021-2032)
 - 1.3.4 Europe Based Company Exogenous Circular RNA Synthesis Service Revenue (2021-2032)
 - 1.3.5 Japan Based Company Exogenous Circular RNA Synthesis Service Revenue (2021-2032)
 - 1.3.6 South Korea Based Company Exogenous Circular RNA Synthesis Service Revenue (2021-2032)
 - 1.3.7 ASEAN Based Company Exogenous Circular RNA Synthesis Service Revenue (2021-2032)
 - 1.3.8 India Based Company Exogenous Circular RNA Synthesis Service Revenue (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Exogenous Circular RNA Synthesis Service Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Exogenous Circular RNA Synthesis Service Consumption Value (2021-2032)
- 2.2 World Exogenous Circular RNA Synthesis Service Consumption Value by Region
 - 2.2.1 World Exogenous Circular RNA Synthesis Service Consumption Value by Region (2021-2026)
 - 2.2.2 World Exogenous Circular RNA Synthesis Service Consumption Value Forecast by Region (2027-2032)
- 2.3 United States Exogenous Circular RNA Synthesis Service Consumption Value

(2021-2032)

2.4 China Exogenous Circular RNA Synthesis Service Consumption Value (2021-2032)

2.5 Europe Exogenous Circular RNA Synthesis Service Consumption Value
(2021-2032)

2.6 Japan Exogenous Circular RNA Synthesis Service Consumption Value (2021-2032)

2.7 South Korea Exogenous Circular RNA Synthesis Service Consumption Value
(2021-2032)

2.8 ASEAN Exogenous Circular RNA Synthesis Service Consumption Value
(2021-2032)

2.9 India Exogenous Circular RNA Synthesis Service Consumption Value (2021-2032)

3 WORLD EXOGENOUS CIRCULAR RNA SYNTHESIS SERVICE COMPANIES COMPETITIVE ANALYSIS

3.1 World Exogenous Circular RNA Synthesis Service Revenue by Player (2021-2026)

3.2 Industry Rank and Concentration Rate (CR)

3.2.1 Global Exogenous Circular RNA Synthesis Service Industry Rank of Major
Players

3.2.2 Global Concentration Ratios (CR4) for Exogenous Circular RNA Synthesis
Service in 2025

3.2.3 Global Concentration Ratios (CR8) for Exogenous Circular RNA Synthesis
Service in 2025

3.3 Exogenous Circular RNA Synthesis Service Company Evaluation Quadrant

3.4 Exogenous Circular RNA Synthesis Service Market: Overall Company Footprint
Analysis

3.4.1 Exogenous Circular RNA Synthesis Service Market: Region Footprint

3.4.2 Exogenous Circular RNA Synthesis Service Market: Company Product Type
Footprint

3.4.3 Exogenous Circular RNA Synthesis Service Market: Company Product
Application Footprint

3.5 Competitive Environment

3.5.1 Historical Structure of the Industry

3.5.2 Barriers of Market Entry

3.5.3 Factors of Competition

3.6 Mergers & Acquisitions Activity

4 UNITED STATES VS CHINA VS REST OF WORLD (BY HEADQUARTER LOCATION)

4.1 United States VS China: Exogenous Circular RNA Synthesis Service Revenue Comparison (by Headquarter Location)

4.1.1 United States VS China: Exogenous Circular RNA Synthesis Service Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)

4.1.2 United States VS China: Exogenous Circular RNA Synthesis Service Revenue Market Share Comparison (2021 & 2025 & 2032)

4.2 United States Based Companies VS China Based Companies: Exogenous Circular RNA Synthesis Service Consumption Value Comparison

4.2.1 United States VS China: Exogenous Circular RNA Synthesis Service Consumption Value Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Exogenous Circular RNA Synthesis Service Consumption Value Market Share Comparison (2021 & 2025 & 2032)

4.3 United States Based Exogenous Circular RNA Synthesis Service Companies and Market Share, 2021-2026

4.3.1 United States Based Exogenous Circular RNA Synthesis Service Companies, Headquarters (States, Country)

4.3.2 United States Based Companies Exogenous Circular RNA Synthesis Service Revenue, (2021-2026)

4.4 China Based Companies Exogenous Circular RNA Synthesis Service Revenue and Market Share, 2021-2026

4.4.1 China Based Exogenous Circular RNA Synthesis Service Companies, Company Headquarters (Province, Country)

4.4.2 China Based Companies Exogenous Circular RNA Synthesis Service Revenue, (2021-2026)

4.5 Rest of World Based Exogenous Circular RNA Synthesis Service Companies and Market Share, 2021-2026

4.5.1 Rest of World Based Exogenous Circular RNA Synthesis Service Companies, Headquarters (Province, Country)

4.5.2 Rest of World Based Companies Exogenous Circular RNA Synthesis Service Revenue (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Exogenous Circular RNA Synthesis Service Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Custom Synthesis

5.2.2 Process Development

5.2.3 Analytical and QC Services

5.2.4 Other

5.3 Market Segment by Type

5.3.1 World Exogenous Circular RNA Synthesis Service Market Size by Type (2021-2026)

5.3.2 World Exogenous Circular RNA Synthesis Service Market Size by Type (2027-2032)

5.3.3 World Exogenous Circular RNA Synthesis Service Market Size Market Share by Type (2027-2032)

6 MARKET ANALYSIS BY CIRCULARIZATION METHOD

6.1 World Exogenous Circular RNA Synthesis Service Market Size Overview by Circularization Method: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Circularization Method

6.2.1 PIE Circularization

6.2.2 Enzymatic Ligation

6.2.3 Other

6.3 Market Segment by Circularization Method

6.3.1 World Exogenous Circular RNA Synthesis Service Market Size by Circularization Method (2021-2026)

6.3.2 World Exogenous Circular RNA Synthesis Service Market Size by Circularization Method (2027-2032)

6.3.3 World Exogenous Circular RNA Synthesis Service Market Size Market Share by Circularization Method (2027-2032)

7 MARKET ANALYSIS BY PRODUCT FORMAT

7.1 World Exogenous Circular RNA Synthesis Service Market Size Overview by Product Format: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Product Format

7.2.1 Naked circRNA

7.2.2 circRNA-LNP

7.2.3 Other

7.3 Market Segment by Product Format

7.3.1 World Exogenous Circular RNA Synthesis Service Market Size by Product Format (2021-2026)

7.3.2 World Exogenous Circular RNA Synthesis Service Market Size by Product Format (2027-2032)

7.3.3 World Exogenous Circular RNA Synthesis Service Market Size Market Share by

Product Format (2027-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Exogenous Circular RNA Synthesis Service Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Pharmaceutical and Biotechnology Companies

8.2.2 CRO and CDMO Companies

8.2.3 Other

8.3 Market Segment by Application

8.3.1 World Exogenous Circular RNA Synthesis Service Market Size by Application (2021-2026)

8.3.2 World Exogenous Circular RNA Synthesis Service Market Size by Application (2027-2032)

8.3.3 World Exogenous Circular RNA Synthesis Service Market Size Market Share by Application (2021-2032)

9 COMPANY PROFILES

9.1 GenScript Biotech Corporation

9.1.1 GenScript Biotech Corporation Details

9.1.2 GenScript Biotech Corporation Major Business

9.1.3 GenScript Biotech Corporation Exogenous Circular RNA Synthesis Service Product and Services

9.1.4 GenScript Biotech Corporation Exogenous Circular RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026)

9.1.5 GenScript Biotech Corporation Recent Developments/Updates

9.1.6 GenScript Biotech Corporation Competitive Strengths & Weaknesses

9.2 VectorBuilder

9.2.1 VectorBuilder Details

9.2.2 VectorBuilder Major Business

9.2.3 VectorBuilder Exogenous Circular RNA Synthesis Service Product and Services

9.2.4 VectorBuilder Exogenous Circular RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026)

9.2.5 VectorBuilder Recent Developments/Updates

9.2.6 VectorBuilder Competitive Strengths & Weaknesses

9.3 Guangzhou Genesee Biotech

9.3.1 Guangzhou Genesee Biotech Details

- 9.3.2 Guangzhou Geneseeed Biotech Major Business
- 9.3.3 Guangzhou Geneseeed Biotech Exogenous Circular RNA Synthesis Service Product and Services
- 9.3.4 Guangzhou Geneseeed Biotech Exogenous Circular RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026)
- 9.3.5 Guangzhou Geneseeed Biotech Recent Developments/Updates
- 9.3.6 Guangzhou Geneseeed Biotech Competitive Strengths & Weaknesses
- 9.4 uBriGene Biosciences
 - 9.4.1 uBriGene Biosciences Details
 - 9.4.2 uBriGene Biosciences Major Business
 - 9.4.3 uBriGene Biosciences Exogenous Circular RNA Synthesis Service Product and Services
 - 9.4.4 uBriGene Biosciences Exogenous Circular RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026)
 - 9.4.5 uBriGene Biosciences Recent Developments/Updates
 - 9.4.6 uBriGene Biosciences Competitive Strengths & Weaknesses
- 9.5 Yaohai Bio-Pharma
 - 9.5.1 Yaohai Bio-Pharma Details
 - 9.5.2 Yaohai Bio-Pharma Major Business
 - 9.5.3 Yaohai Bio-Pharma Exogenous Circular RNA Synthesis Service Product and Services
 - 9.5.4 Yaohai Bio-Pharma Exogenous Circular RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026)
 - 9.5.5 Yaohai Bio-Pharma Recent Developments/Updates
 - 9.5.6 Yaohai Bio-Pharma Competitive Strengths & Weaknesses
- 9.6 Creative Biogene
 - 9.6.1 Creative Biogene Details
 - 9.6.2 Creative Biogene Major Business
 - 9.6.3 Creative Biogene Exogenous Circular RNA Synthesis Service Product and Services
 - 9.6.4 Creative Biogene Exogenous Circular RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026)
 - 9.6.5 Creative Biogene Recent Developments/Updates
 - 9.6.6 Creative Biogene Competitive Strengths & Weaknesses
- 9.7 Creative Biolabs
 - 9.7.1 Creative Biolabs Details
 - 9.7.2 Creative Biolabs Major Business
 - 9.7.3 Creative Biolabs Exogenous Circular RNA Synthesis Service Product and Services

9.7.4 Creative Biolabs Exogenous Circular RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026)

9.7.5 Creative Biolabs Recent Developments/Updates

9.7.6 Creative Biolabs Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Exogenous Circular RNA Synthesis Service Industry Chain

10.2 Exogenous Circular RNA Synthesis Service Upstream Analysis

10.3 Exogenous Circular RNA Synthesis Service Midstream Analysis

10.4 Exogenous Circular RNA Synthesis Service Downstream Analysis

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Exogenous Circular RNA Synthesis Service Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Table 2. World Exogenous Circular RNA Synthesis Service Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)

Table 3. World Exogenous Circular RNA Synthesis Service Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)

Table 4. World Exogenous Circular RNA Synthesis Service Revenue Market Share by Region (2021-2026), (by Headquarter Location)

Table 5. World Exogenous Circular RNA Synthesis Service Revenue Market Share by Region (2027-2032), (by Headquarter Location)

Table 6. Major Market Trends

Table 7. World Exogenous Circular RNA Synthesis Service Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)

Table 8. World Exogenous Circular RNA Synthesis Service Consumption Value by Region (2021-2026) & (USD Million)

Table 9. World Exogenous Circular RNA Synthesis Service Consumption Value Forecast by Region (2027-2032) & (USD Million)

Table 10. World Exogenous Circular RNA Synthesis Service Revenue by Player (2021-2026) & (USD Million)

Table 11. Revenue Market Share of Key Exogenous Circular RNA Synthesis Service Players in 2025

Table 12. World Exogenous Circular RNA Synthesis Service Industry Rank of Major Player, Based on Revenue in 2025

Table 13. Global Exogenous Circular RNA Synthesis Service Company Evaluation Quadrant

Table 14. Head Office of Key Exogenous Circular RNA Synthesis Service Players

Table 15. Exogenous Circular RNA Synthesis Service Market: Company Product Type Footprint

Table 16. Exogenous Circular RNA Synthesis Service Market: Company Product Application Footprint

Table 17. Exogenous Circular RNA Synthesis Service Mergers & Acquisitions Activity

Table 18. United States VS China Exogenous Circular RNA Synthesis Service Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 19. United States VS China Exogenous Circular RNA Synthesis Service Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 20. United States Based Exogenous Circular RNA Synthesis Service Companies, Headquarters (States, Country)

Table 21. United States Based Companies Exogenous Circular RNA Synthesis Service Revenue, (2021-2026) & (USD Million)

Table 22. United States Based Companies Exogenous Circular RNA Synthesis Service Revenue Market Share (2021-2026)

Table 23. China Based Exogenous Circular RNA Synthesis Service Companies, Headquarters (Province, Country)

Table 24. China Based Companies Exogenous Circular RNA Synthesis Service Revenue, (2021-2026) & (USD Million)

Table 25. China Based Companies Exogenous Circular RNA Synthesis Service Revenue Market Share (2021-2026)

Table 26. Rest of World Based Exogenous Circular RNA Synthesis Service Companies, Headquarters (Province, Country)

Table 27. Rest of World Based Companies Exogenous Circular RNA Synthesis Service Revenue (2021-2026) & (USD Million)

Table 28. Rest of World Based Companies Exogenous Circular RNA Synthesis Service Revenue Market Share (2021-2026)

Table 29. World Exogenous Circular RNA Synthesis Service Market Size by Type, (USD Million), 2021 & 2025 & 2032

Table 30. World Exogenous Circular RNA Synthesis Service Market Size Value by Type (2021-2026) & (USD Million)

Table 31. World Exogenous Circular RNA Synthesis Service Market Size by Type (2027-2032) & (USD Million)

Table 32. World Exogenous Circular RNA Synthesis Service Market Size by Circularization Method, (USD Million), 2021 & 2025 & 2032

Table 33. World Exogenous Circular RNA Synthesis Service Market Size Value by Circularization Method (2021-2026) & (USD Million)

Table 34. World Exogenous Circular RNA Synthesis Service Market Size by Circularization Method (2027-2032) & (USD Million)

Table 35. World Exogenous Circular RNA Synthesis Service Market Size by Product Format, (USD Million), 2021 & 2025 & 2032

Table 36. World Exogenous Circular RNA Synthesis Service Market Size Value by Product Format (2021-2026) & (USD Million)

Table 37. World Exogenous Circular RNA Synthesis Service Market Size by Product Format (2027-2032) & (USD Million)

Table 38. World Exogenous Circular RNA Synthesis Service Market Size by Application, (USD Million), 2021 & 2025 & 2032

Table 39. World Exogenous Circular RNA Synthesis Service Market Size by Application

(2021-2026) & (USD Million)

Table 40. World Exogenous Circular RNA Synthesis Service Market Size by Application (2027-2032) & (USD Million)

Table 41. GenScript Biotech Corporation Basic Information, Manufacturing Base and Competitors

Table 42. GenScript Biotech Corporation Major Business

Table 43. GenScript Biotech Corporation Exogenous Circular RNA Synthesis Service Product and Services

Table 44. GenScript Biotech Corporation Exogenous Circular RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 45. GenScript Biotech Corporation Recent Developments/Updates

Table 46. GenScript Biotech Corporation Competitive Strengths & Weaknesses

Table 47. VectorBuilder Basic Information, Manufacturing Base and Competitors

Table 48. VectorBuilder Major Business

Table 49. VectorBuilder Exogenous Circular RNA Synthesis Service Product and Services

Table 50. VectorBuilder Exogenous Circular RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 51. VectorBuilder Recent Developments/Updates

Table 52. VectorBuilder Competitive Strengths & Weaknesses

Table 53. Guangzhou Genesee Biotech Basic Information, Manufacturing Base and Competitors

Table 54. Guangzhou Genesee Biotech Major Business

Table 55. Guangzhou Genesee Biotech Exogenous Circular RNA Synthesis Service Product and Services

Table 56. Guangzhou Genesee Biotech Exogenous Circular RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 57. Guangzhou Genesee Biotech Recent Developments/Updates

Table 58. Guangzhou Genesee Biotech Competitive Strengths & Weaknesses

Table 59. uBriGene Biosciences Basic Information, Manufacturing Base and Competitors

Table 60. uBriGene Biosciences Major Business

Table 61. uBriGene Biosciences Exogenous Circular RNA Synthesis Service Product and Services

Table 62. uBriGene Biosciences Exogenous Circular RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 63. uBriGene Biosciences Recent Developments/Updates

Table 64. uBriGene Biosciences Competitive Strengths & Weaknesses

Table 65. Yaohai Bio-Pharma Basic Information, Manufacturing Base and Competitors

Table 66. Yaohai Bio-Pharma Major Business

Table 67. Yaohai Bio-Pharma Exogenous Circular RNA Synthesis Service Product and Services

Table 68. Yaohai Bio-Pharma Exogenous Circular RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 69. Yaohai Bio-Pharma Recent Developments/Updates

Table 70. Yaohai Bio-Pharma Competitive Strengths & Weaknesses

Table 71. Creative Biogene Basic Information, Manufacturing Base and Competitors

Table 72. Creative Biogene Major Business

Table 73. Creative Biogene Exogenous Circular RNA Synthesis Service Product and Services

Table 74. Creative Biogene Exogenous Circular RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 75. Creative Biogene Recent Developments/Updates

Table 76. Creative Biogene Competitive Strengths & Weaknesses

Table 77. Creative Biolabs Basic Information, Manufacturing Base and Competitors

Table 78. Creative Biolabs Major Business

Table 79. Creative Biolabs Exogenous Circular RNA Synthesis Service Product and Services

Table 80. Creative Biolabs Exogenous Circular RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 81. Creative Biolabs Recent Developments/Updates

Table 82. Creative Biolabs Competitive Strengths & Weaknesses

Table 83. Global Key Players of Exogenous Circular RNA Synthesis Service Upstream (Raw Materials)

Table 84. Global Exogenous Circular RNA Synthesis Service Typical Customers

List Of Figures

LIST OF FIGURES

Figure 1. Exogenous Circular RNA Synthesis Service Picture

Figure 2. World Exogenous Circular RNA Synthesis Service Total Revenue: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Exogenous Circular RNA Synthesis Service Total Revenue (2021-2032) & (USD Million)

Figure 4. World Exogenous Circular RNA Synthesis Service Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Figure 5. World Exogenous Circular RNA Synthesis Service Revenue Market Share by Region (2021-2032), (by Headquarter Location)

Figure 6. United States Based Company Exogenous Circular RNA Synthesis Service Revenue (2021-2032) & (USD Million)

Figure 7. China Based Company Exogenous Circular RNA Synthesis Service Revenue (2021-2032) & (USD Million)

Figure 8. Europe Based Company Exogenous Circular RNA Synthesis Service Revenue (2021-2032) & (USD Million)

Figure 9. Japan Based Company Exogenous Circular RNA Synthesis Service Revenue (2021-2032) & (USD Million)

Figure 10. South Korea Based Company Exogenous Circular RNA Synthesis Service Revenue (2021-2032) & (USD Million)

Figure 11. ASEAN Based Company Exogenous Circular RNA Synthesis Service Revenue (2021-2032) & (USD Million)

Figure 12. India Based Company Exogenous Circular RNA Synthesis Service Revenue (2021-2032) & (USD Million)

Figure 13. Exogenous Circular RNA Synthesis Service Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World Exogenous Circular RNA Synthesis Service Consumption Value (2021-2032) & (USD Million)

Figure 16. World Exogenous Circular RNA Synthesis Service Consumption Value Market Share by Region (2021-2032)

Figure 17. United States Exogenous Circular RNA Synthesis Service Consumption Value (2021-2032) & (USD Million)

Figure 18. China Exogenous Circular RNA Synthesis Service Consumption Value (2021-2032) & (USD Million)

Figure 19. Europe Exogenous Circular RNA Synthesis Service Consumption Value (2021-2032) & (USD Million)

Figure 20. Japan Exogenous Circular RNA Synthesis Service Consumption Value (2021-2032) & (USD Million)

Figure 21. South Korea Exogenous Circular RNA Synthesis Service Consumption Value (2021-2032) & (USD Million)

Figure 22. ASEAN Exogenous Circular RNA Synthesis Service Consumption Value (2021-2032) & (USD Million)

Figure 23. India Exogenous Circular RNA Synthesis Service Consumption Value (2021-2032) & (USD Million)

Figure 24. Producer Shipments of Exogenous Circular RNA Synthesis Service by Player Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for Exogenous Circular RNA Synthesis Service Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for Exogenous Circular RNA Synthesis Service Markets in 2025

Figure 27. United States VS China: Exogenous Circular RNA Synthesis Service Revenue Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Exogenous Circular RNA Synthesis Service Consumption Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. World Exogenous Circular RNA Synthesis Service Market Size by Type, (USD Million), 2021 & 2025 & 2032

Figure 30. World Exogenous Circular RNA Synthesis Service Market Size Market Share by Type in 2025

Figure 31. Custom Synthesis

Figure 32. Process Development

Figure 33. Analytical and QC Services

Figure 34. Other

Figure 35. World Exogenous Circular RNA Synthesis Service Market Size Market Share by Type (2021-2032)

Figure 36. World Exogenous Circular RNA Synthesis Service Market Size by Circularization Method, (USD Million), 2021 & 2025 & 2032

Figure 37. World Exogenous Circular RNA Synthesis Service Market Size Market Share by Circularization Method in 2025

Figure 38. PIE Circularization

Figure 39. Enzymatic Ligation

Figure 40. Other

Figure 41. World Exogenous Circular RNA Synthesis Service Market Size Market Share by Circularization Method (2021-2032)

Figure 42. World Exogenous Circular RNA Synthesis Service Market Size by Product Format, (USD Million), 2021 & 2025 & 2032

Figure 43. World Exogenous Circular RNA Synthesis Service Market Size Market Share by Product Format in 2025

Figure 44. Naked circRNA

Figure 45. circRNA-LNP

Figure 46. Other

Figure 47. World Exogenous Circular RNA Synthesis Service Market Size Market Share by Product Format (2021-2032)

Figure 48. World Exogenous Circular RNA Synthesis Service Market Size by Application, (USD Million), 2021 & 2025 & 2032

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

Figure 50. Pharmaceutical and Biotechnology Companies

Figure 51. CRO and CDMO Companies

Figure 52. Other

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

Figure 54. Exogenous Circular RNA Synthesis Service Industrial Chain

Figure 55. Methodology

Figure 56. Research Process and Data Source

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