

Global IVT mRNA Synthesis Service Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global IVT mRNA Synthesis Service market size is expected to reach \$ 1768 million by 2032, rising at a market growth of 7.5% CAGR during the forecast period (2026-2032).

IVT mRNA synthesis services use plasmid DNA or linear DNA as the transcription template and RNA polymerases such as T7 or SP6 to produce customized mRNA through in vitro transcription. Depending on project requirements, the service may include 5' capping, 3' poly(A) tail construction, nucleotide modification, purification, bioburden control, and quality testing, delivering mRNA drug substance for research, preclinical, clinical, or commercial applications. Major upstream inputs include DNA templates, natural and modified NTPs, RNA polymerases, cap analogs or capping enzymes, poly(A) polymerase, DNase, buffers, chromatography resins, ultrafiltration membranes, and single-use consumables. Major downstream customers include pharmaceutical and biotechnology companies, academic and research institutions, CROs, CDMOs, and selected diagnostic developers. The industry's overall gross profit margin is approximately 42%-60%.

The global IVT mRNA synthesis service market has shifted from pandemic-driven, large-scale vaccine capacity expansion toward a normalized market supported by discovery research, preclinical development, personalized therapies, and diversified clinical pipelines. Research-grade orders are numerous but generally have low individual values, while clinical and GMP projects are less frequent but contribute substantially higher project revenue. Customers increasingly evaluate suppliers based not only on transcription yield, but also on RNA integrity, capping efficiency, poly(A) tail consistency, residual DNA, double-stranded RNA impurities, endotoxin control, and the transferability of analytical methods. Providers capable of supporting projects continuously from

screening through GMP manufacturing are better positioned to retain customers.

Technology development is moving toward higher expression, lower immunogenicity, and more consistent manufacturing processes. Modified nucleotides, co-transcriptional capping, controlled poly(A) tail engineering, low-dsRNA transcription systems, and high-resolution purification are becoming major competitive factors. The development of self-amplifying RNA is also requiring providers to improve long RNA manufacturing and structural control. High-throughput construct screening, codon and UTR optimization, digital sequence design, and automated small-scale production are shortening candidate selection cycles. Linear DNA and cell-free template technologies are also emerging as alternatives to conventional plasmid templates, potentially reducing template preparation time and improving supply chain flexibility.

Demand is primarily driven by the expansion of mRNA applications and the increasing use of outsourced development and manufacturing. Beyond infectious disease vaccines, oncology vaccines, protein replacement, in vivo gene editing, immune-cell engineering, and rare disease therapies are generating new projects. Small and medium-sized biotechnology companies often lack dedicated RNA manufacturing facilities, analytical methods, and GMP quality systems, making outsourcing an attractive option. Large pharmaceutical companies also use external suppliers when internal capacity is constrained, a second source is required, or multiple constructs must be screened. Suppliers that maintain continuity in raw materials, processes, and analytical methods across development stages have a stronger competitive position.

The industry continues to face capacity mismatch, low pipeline conversion rates, and evolving regulatory expectations. Some large-scale vaccine capacity built during the pandemic is not directly suited to small-batch, personalized, or multi-product programs, while early-stage projects may require long development periods before reaching clinical or commercial manufacturing. Intellectual property associated with critical enzymes, modified nucleotides, capping technologies, and delivery lipids can increase project cost and licensing complexity. RNA stability, frozen storage, and cross-border transportation also complicate delivery. Price competition remains significant in the research-grade segment, while in-house manufacturing by major pharmaceutical companies limits part of the outsourcing opportunity. Future market development will favor platform providers with flexible scales, differentiated processes, and mature quality systems.

This report studies the global IVT mRNA Synthesis Service demand, key companies,

and key regions.

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

Highlights and key features of the study

Global IVT mRNA Synthesis Service total market, 2021-2032, (USD Million)

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

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

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

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

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

This report profiles major players in the global IVT mRNA 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 Maravai LifeSciences, Danaher, GenScript, Azenta, Eurofins Scientific, Lonza, Catalent, Thermo Fisher Scientific, Merck KGaA, AGC, 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 IVT mRNA 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 IVT mRNA Synthesis Service Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global IVT mRNA Synthesis Service Market, Segmentation by Type:

Research Grade

Preclinical Grade

GMP Grade

Other

Global IVT mRNA Synthesis Service Market, Segmentation by Batch Scale:

Micro Scale (?1 mg)

Small Scale (>1?100 mg)

Pilot Scale (>100 mg?10 g)

Manufacturing Scale (>10 g)

Global IVT mRNA Synthesis Service Market, Segmentation by RNA Format:

Conventional mRNA

Self-Amplifying RNA

Global IVT mRNA Synthesis Service Market, Segmentation by Application:

Pharmaceutical and Biotechnology Companies

Academic and Research Institutes

Other

Companies Profiled:

Maravai LifeSciences

Danaher

GenScript

Azenta

Eurofins Scientific

Lonza

Catalent

Thermo Fisher Scientific

Merck KGaA

AGC

Samsung Biologics

Recipharm

Curia

VectorBuilder

Biomay

Ricoh

ARCALIS

Bioneer

Key Questions Answered

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

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