

Global IVT 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 IVT RNA Synthesis Service market size was valued at US\$ 1311 million in 2025 and is forecast to a readjusted size of US\$ 2621 million by 2032 with a CAGR of 10.5% during review period.

IVT RNA Synthesis Service refers to the customized production of RNA using plasmid DNA, PCR products, or other linear DNA as templates and RNA polymerases such as T7, T3, or SP6 for in vitro transcription. Depending on the RNA format and customer requirements, the service may include 5' capping, 3' poly(A) tail construction, nucleotide modification, RNA circularization, duplex annealing, purification, bioburden control, and quality testing. Major deliverables include conventional mRNA, self-amplifying RNA, circular RNA, guide RNA, double-stranded RNA, transfer RNA, long non-coding RNA, and RNA probes. Major upstream inputs include DNA templates, natural and modified NTPs, RNA polymerases, cap analogs or capping enzymes, poly(A) polymerase, RNA ligases, DNase, RNase inhibitors, buffers, chromatography resins, ultrafiltration membranes, and single-use consumables. Major downstream customers include pharmaceutical and biotechnology companies, vaccine developers, gene and cell therapy companies, diagnostic companies, academic institutions, CROs, and CDMOs. The industry's overall gross profit margin is approximately 40%-58%.

The global IVT RNA synthesis service market has evolved from a fragmented service sector focused mainly on research-grade transcripts and conventional mRNA into a specialized value chain covering discovery, preclinical research, clinical trials, and commercial manufacturing. Research-grade orders continue to account for most project volume and support gene expression, cell transfection, RNA structure studies, genome

editing, RNA interference, and diagnostic standard development. Clinical and GMP projects are less frequent, but they generally include template development, process optimization, analytical method establishment, stability studies, and batch release testing, resulting in a greater contribution to revenue. Competition is therefore shifting from simple RNA sample delivery toward continuous development and manufacturing support.

Technical competition is moving from basic transcription yield toward RNA integrity, full-length transcript content, end-structure consistency, low double-stranded RNA impurity levels, residual DNA control, and biological potency. Different RNA formats require substantially different manufacturing strategies. Short guide RNA projects emphasize sequence accuracy and terminal homogeneity, conventional mRNA projects focus on capping efficiency, poly(A) tail length, and translation performance, while saRNA and other long RNA constructs require greater control of full-length transcription, structural stability, and mechanical shearing. High-resolution chromatography, tangential flow filtration, continuous processing, online monitoring, and automated small-scale synthesis are becoming important methods for improving consistency and shortening delivery timelines.

Market growth is being supported by RNA vaccines, cancer immunotherapy, protein replacement, in vivo genome editing, cell engineering, and RNA-based diagnostic development. Compared with establishing internal production systems, outsourcing reduces the initial investment required for specialized equipment, RNase-controlled environments, analytical platforms, and GMP quality systems. This is particularly attractive to biotechnology companies with limited project numbers or early-stage pipelines. The development of circRNA, saRNA, and other emerging RNA architectures is also encouraging conventional mRNA service providers to expand their capabilities in long RNA production, circularization, complex purification, and functional validation, creating broader multi-format RNA service platforms.

The industry continues to face capacity mismatch, limited project conversion rates, inconsistent quality standards, and price competition. Some large-scale mRNA capacity established during the pandemic is not directly suited to small-batch, multi-product, or structurally complex RNA programs, while research orders are fragmented, lower in value, and associated with relatively low customer switching costs. Fully harmonized quality standards have not yet been established for all RNA formats, and long RNA degradation, double-stranded RNA impurities, incorrect folding, and batch variability can delay development programs. In addition, internal RNA manufacturing by large pharmaceutical companies, intellectual property restrictions involving critical enzymes

and capping technologies, and concentration among key raw material suppliers may place pressure on pricing and profitability in the external service market.

This report is a detailed and comprehensive analysis for global IVT 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 IVT RNA Synthesis Service market size and forecasts, in consumption value (\$ Million), 2021-2032

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

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

Global IVT 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 IVT 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 IVT 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 Maravai LifeSciences, Danaher, GenScript, Azenta, Eurofins Scientific, Lonza, Thermo Fisher Scientific, Merck KGaA, AGC, Samsung Biologics, etc.

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

Market segmentation

IVT 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

Research Grade

Preclinical Grade

GMP Grade

Other

Market segment by RNA Structure

Linear Single-Stranded RNA

Circular RNA

Double-Stranded RNA

Market segment by RNA Type

Conventional mRNA

Self-Amplifying RNA

Other

Market segment by Application

Pharmaceutical and Biotechnology Companies

Academic and Research Institutes

Other

Market segment by players, this report covers

Maravai LifeSciences

Danaher

GenScript

Azenta

Eurofins Scientific

Lonza

Thermo Fisher Scientific

Merck KGaA

AGC

Samsung Biologics

Recipharm

Wacker

Curia

Biomay

ARCALIS

VectorBuilder

Creative Biogene

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 IVT RNA Synthesis Service product scope, market overview, market estimation caveats and base year.

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

Chapter 3, the IVT 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 IVT

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 IVT RNA Synthesis Service.

Chapter 13, to describe IVT RNA Synthesis Service research findings and conclusion.

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