

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

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Abstracts

The global IVT RNA Synthesis Service market size is expected to reach \$ 2621 million by 2032, rising at a market growth of 10.5% CAGR during the forecast period (2026-2032).

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

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

Highlights and key features of the study

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

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

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

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

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

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

This report profiles major 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.

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

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global IVT RNA Synthesis Service Market, Segmentation by Type:

Research Grade

Preclinical Grade

GMP Grade

Other

Global IVT RNA Synthesis Service Market, Segmentation by RNA Structure:

Linear Single-Stranded RNA

Circular RNA

Double-Stranded RNA

Global IVT RNA Synthesis Service Market, Segmentation by RNA Type:

Conventional mRNA

Self-Amplifying RNA

Other

Global IVT RNA 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

Thermo Fisher Scientific

Merck KGaA

AGC

Samsung Biologics

Recipharm

Wacker

Curia

Biomay

ARCALIS

VectorBuilder

Creative Biogene

Key Questions Answered

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

Contents

1 SUPPLY SUMMARY

1.1 IVT RNA Synthesis Service Introduction

1.2 World IVT RNA Synthesis Service Market Size & Forecast (2021 & 2025 & 2032)

1.3 World IVT RNA Synthesis Service Total Market by Region (by Headquarter Location)

1.3.1 World IVT RNA Synthesis Service Market Size by Region (2021-2032), (by Headquarter Location)

1.3.2 United States Based Company IVT RNA Synthesis Service Revenue (2021-2032)

1.3.3 China Based Company IVT RNA Synthesis Service Revenue (2021-2032)

1.3.4 Europe Based Company IVT RNA Synthesis Service Revenue (2021-2032)

1.3.5 Japan Based Company IVT RNA Synthesis Service Revenue (2021-2032)

1.3.6 South Korea Based Company IVT RNA Synthesis Service Revenue (2021-2032)

1.3.7 ASEAN Based Company IVT RNA Synthesis Service Revenue (2021-2032)

1.3.8 India Based Company IVT RNA Synthesis Service Revenue (2021-2032)

1.4 Market Drivers, Restraints and Trends

1.4.1 IVT RNA Synthesis Service Market Drivers

1.4.2 Factors Affecting Demand

1.4.3 Major Market Trends

2 DEMAND SUMMARY

2.1 World IVT RNA Synthesis Service Consumption Value (2021-2032)

2.2 World IVT RNA Synthesis Service Consumption Value by Region

2.2.1 World IVT RNA Synthesis Service Consumption Value by Region (2021-2026)

2.2.2 World IVT RNA Synthesis Service Consumption Value Forecast by Region (2027-2032)

2.3 United States IVT RNA Synthesis Service Consumption Value (2021-2032)

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

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

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

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

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

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

3 WORLD IVT RNA SYNTHESIS SERVICE COMPANIES COMPETITIVE ANALYSIS

- 3.1 World IVT RNA Synthesis Service Revenue by Player (2021-2026)
- 3.2 Industry Rank and Concentration Rate (CR)
 - 3.2.1 Global IVT RNA Synthesis Service Industry Rank of Major Players
 - 3.2.2 Global Concentration Ratios (CR4) for IVT RNA Synthesis Service in 2025
 - 3.2.3 Global Concentration Ratios (CR8) for IVT RNA Synthesis Service in 2025
- 3.3 IVT RNA Synthesis Service Company Evaluation Quadrant
- 3.4 IVT RNA Synthesis Service Market: Overall Company Footprint Analysis
 - 3.4.1 IVT RNA Synthesis Service Market: Region Footprint
 - 3.4.2 IVT RNA Synthesis Service Market: Company Product Type Footprint
 - 3.4.3 IVT 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: IVT RNA Synthesis Service Revenue Comparison (by Headquarter Location)
 - 4.1.1 United States VS China: IVT RNA Synthesis Service Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)
 - 4.1.2 United States VS China: IVT RNA Synthesis Service Revenue Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States Based Companies VS China Based Companies: IVT RNA Synthesis Service Consumption Value Comparison
 - 4.2.1 United States VS China: IVT RNA Synthesis Service Consumption Value Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: IVT RNA Synthesis Service Consumption Value Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States Based IVT RNA Synthesis Service Companies and Market Share, 2021-2026
 - 4.3.1 United States Based IVT RNA Synthesis Service Companies, Headquarters (States, Country)
 - 4.3.2 United States Based Companies IVT RNA Synthesis Service Revenue, (2021-2026)
- 4.4 China Based Companies IVT RNA Synthesis Service Revenue and Market Share,

2021-2026

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

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

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

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

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

5 MARKET ANALYSIS BY TYPE

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

5.2 Segment Introduction by Type

5.2.1 Research Grade

5.2.2 Preclinical Grade

5.2.3 GMP Grade

5.2.4 Other

5.3 Market Segment by Type

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

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

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

6 MARKET ANALYSIS BY RNA STRUCTURE

6.1 World IVT RNA Synthesis Service Market Size Overview by RNA Structure: 2021 VS 2025 VS 2032

6.2 Segment Introduction by RNA Structure

6.2.1 Linear Single-Stranded RNA

6.2.2 Circular RNA

6.2.3 Double-Stranded RNA

6.3 Market Segment by RNA Structure

6.3.1 World IVT RNA Synthesis Service Market Size by RNA Structure (2021-2026)

6.3.2 World IVT RNA Synthesis Service Market Size by RNA Structure (2027-2032)

6.3.3 World IVT RNA Synthesis Service Market Size Market Share by RNA Structure (2027-2032)

7 MARKET ANALYSIS BY RNA TYPE

7.1 World IVT RNA Synthesis Service Market Size Overview by RNA Type: 2021 VS 2025 VS 2032

7.2 Segment Introduction by RNA Type

7.2.1 Conventional mRNA

7.2.2 Self-Amplifying RNA

7.2.3 Other

7.3 Market Segment by RNA Type

7.3.1 World IVT RNA Synthesis Service Market Size by RNA Type (2021-2026)

7.3.2 World IVT RNA Synthesis Service Market Size by RNA Type (2027-2032)

7.3.3 World IVT RNA Synthesis Service Market Size Market Share by RNA Type (2027-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World IVT 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 Academic and Research Institutes

8.2.3 Other

8.3 Market Segment by Application

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

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

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

9 COMPANY PROFILES

9.1 Maravai LifeSciences

9.1.1 Maravai LifeSciences Details

9.1.2 Maravai LifeSciences Major Business

9.1.3 Maravai LifeSciences IVT RNA Synthesis Service Product and Services

9.1.4 Maravai LifeSciences IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026)

9.1.5 Maravai LifeSciences Recent Developments/Updates

9.1.6 Maravai LifeSciences Competitive Strengths & Weaknesses

9.2 Danaher

9.2.1 Danaher Details

9.2.2 Danaher Major Business

9.2.3 Danaher IVT RNA Synthesis Service Product and Services

9.2.4 Danaher IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026)

9.2.5 Danaher Recent Developments/Updates

9.2.6 Danaher Competitive Strengths & Weaknesses

9.3 GenScript

9.3.1 GenScript Details

9.3.2 GenScript Major Business

9.3.3 GenScript IVT RNA Synthesis Service Product and Services

9.3.4 GenScript IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026)

9.3.5 GenScript Recent Developments/Updates

9.3.6 GenScript Competitive Strengths & Weaknesses

9.4 Azenta

9.4.1 Azenta Details

9.4.2 Azenta Major Business

9.4.3 Azenta IVT RNA Synthesis Service Product and Services

9.4.4 Azenta IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026)

9.4.5 Azenta Recent Developments/Updates

9.4.6 Azenta Competitive Strengths & Weaknesses

9.5 Eurofins Scientific

9.5.1 Eurofins Scientific Details

9.5.2 Eurofins Scientific Major Business

9.5.3 Eurofins Scientific IVT RNA Synthesis Service Product and Services

9.5.4 Eurofins Scientific IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026)

9.5.5 Eurofins Scientific Recent Developments/Updates

9.5.6 Eurofins Scientific Competitive Strengths & Weaknesses

9.6 Lonza

9.6.1 Lonza Details

9.6.2 Lonza Major Business

9.6.3 Lonza IVT RNA Synthesis Service Product and Services

9.6.4 Lonza IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026)

9.6.5 Lonza Recent Developments/Updates

- 9.6.6 Lonza Competitive Strengths & Weaknesses
- 9.7 Thermo Fisher Scientific
 - 9.7.1 Thermo Fisher Scientific Details
 - 9.7.2 Thermo Fisher Scientific Major Business
 - 9.7.3 Thermo Fisher Scientific IVT RNA Synthesis Service Product and Services
 - 9.7.4 Thermo Fisher Scientific IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026)
 - 9.7.5 Thermo Fisher Scientific Recent Developments/Updates
 - 9.7.6 Thermo Fisher Scientific Competitive Strengths & Weaknesses
- 9.8 Merck KGaA
 - 9.8.1 Merck KGaA Details
 - 9.8.2 Merck KGaA Major Business
 - 9.8.3 Merck KGaA IVT RNA Synthesis Service Product and Services
 - 9.8.4 Merck KGaA IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026)
 - 9.8.5 Merck KGaA Recent Developments/Updates
 - 9.8.6 Merck KGaA Competitive Strengths & Weaknesses
- 9.9 AGC
 - 9.9.1 AGC Details
 - 9.9.2 AGC Major Business
 - 9.9.3 AGC IVT RNA Synthesis Service Product and Services
 - 9.9.4 AGC IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026)
 - 9.9.5 AGC Recent Developments/Updates
 - 9.9.6 AGC Competitive Strengths & Weaknesses
- 9.10 Samsung Biologics
 - 9.10.1 Samsung Biologics Details
 - 9.10.2 Samsung Biologics Major Business
 - 9.10.3 Samsung Biologics IVT RNA Synthesis Service Product and Services
 - 9.10.4 Samsung Biologics IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026)
 - 9.10.5 Samsung Biologics Recent Developments/Updates
 - 9.10.6 Samsung Biologics Competitive Strengths & Weaknesses
- 9.11 Recipharm
 - 9.11.1 Recipharm Details
 - 9.11.2 Recipharm Major Business
 - 9.11.3 Recipharm IVT RNA Synthesis Service Product and Services
 - 9.11.4 Recipharm IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026)

- 9.11.5 Recipharm Recent Developments/Updates
- 9.11.6 Recipharm Competitive Strengths & Weaknesses
- 9.12 Wacker
 - 9.12.1 Wacker Details
 - 9.12.2 Wacker Major Business
 - 9.12.3 Wacker IVT RNA Synthesis Service Product and Services
 - 9.12.4 Wacker IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026)
 - 9.12.5 Wacker Recent Developments/Updates
 - 9.12.6 Wacker Competitive Strengths & Weaknesses
- 9.13 Curia
 - 9.13.1 Curia Details
 - 9.13.2 Curia Major Business
 - 9.13.3 Curia IVT RNA Synthesis Service Product and Services
 - 9.13.4 Curia IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026)
 - 9.13.5 Curia Recent Developments/Updates
 - 9.13.6 Curia Competitive Strengths & Weaknesses
- 9.14 Biomay
 - 9.14.1 Biomay Details
 - 9.14.2 Biomay Major Business
 - 9.14.3 Biomay IVT RNA Synthesis Service Product and Services
 - 9.14.4 Biomay IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026)
 - 9.14.5 Biomay Recent Developments/Updates
 - 9.14.6 Biomay Competitive Strengths & Weaknesses
- 9.15 ARCALIS
 - 9.15.1 ARCALIS Details
 - 9.15.2 ARCALIS Major Business
 - 9.15.3 ARCALIS IVT RNA Synthesis Service Product and Services
 - 9.15.4 ARCALIS IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026)
 - 9.15.5 ARCALIS Recent Developments/Updates
 - 9.15.6 ARCALIS Competitive Strengths & Weaknesses
- 9.16 VectorBuilder
 - 9.16.1 VectorBuilder Details
 - 9.16.2 VectorBuilder Major Business
 - 9.16.3 VectorBuilder IVT RNA Synthesis Service Product and Services
 - 9.16.4 VectorBuilder IVT RNA Synthesis Service Revenue, Gross Margin and Market

Share (2021-2026)

9.16.5 VectorBuilder Recent Developments/Updates

9.16.6 VectorBuilder Competitive Strengths & Weaknesses

9.17 Creative Biogene

9.17.1 Creative Biogene Details

9.17.2 Creative Biogene Major Business

9.17.3 Creative Biogene IVT RNA Synthesis Service Product and Services

9.17.4 Creative Biogene IVT RNA Synthesis Service Revenue, Gross Margin and

Market Share (2021-2026)

9.17.5 Creative Biogene Recent Developments/Updates

9.17.6 Creative Biogene Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 IVT RNA Synthesis Service Industry Chain

10.2 IVT RNA Synthesis Service Upstream Analysis

10.3 IVT RNA Synthesis Service Midstream Analysis

10.4 IVT 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 IVT RNA Synthesis Service Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

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

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

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

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

Table 6. Major Market Trends

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

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

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

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

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

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

Table 13. Global IVT RNA Synthesis Service Company Evaluation Quadrant

Table 14. Head Office of Key IVT RNA Synthesis Service Players

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

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

Table 17. IVT RNA Synthesis Service Mergers & Acquisitions Activity

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Table 32. World IVT RNA Synthesis Service Market Size by RNA Structure, (USD Million), 2021 & 2025 & 2032

Table 33. World IVT RNA Synthesis Service Market Size Value by RNA Structure (2021-2026) & (USD Million)

Table 34. World IVT RNA Synthesis Service Market Size by RNA Structure (2027-2032) & (USD Million)

Table 35. World IVT RNA Synthesis Service Market Size by RNA Type, (USD Million), 2021 & 2025 & 2032

Table 36. World IVT RNA Synthesis Service Market Size Value by RNA Type (2021-2026) & (USD Million)

Table 37. World IVT RNA Synthesis Service Market Size by RNA Type (2027-2032) & (USD Million)

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

Table 39. World IVT RNA Synthesis Service Market Size by Application (2021-2026) & (USD Million)

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

Table 41. Maravai LifeSciences Basic Information, Manufacturing Base and

Competitors

Table 42. Maravai LifeSciences Major Business

Table 43. Maravai LifeSciences IVT RNA Synthesis Service Product and Services

Table 44. Maravai LifeSciences IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 45. Maravai LifeSciences Recent Developments/Updates

Table 46. Maravai LifeSciences Competitive Strengths & Weaknesses

Table 47. Danaher Basic Information, Manufacturing Base and Competitors

Table 48. Danaher Major Business

Table 49. Danaher IVT RNA Synthesis Service Product and Services

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

Table 51. Danaher Recent Developments/Updates

Table 52. Danaher Competitive Strengths & Weaknesses

Table 53. GenScript Basic Information, Manufacturing Base and Competitors

Table 54. GenScript Major Business

Table 55. GenScript IVT RNA Synthesis Service Product and Services

Table 56. GenScript IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 57. GenScript Recent Developments/Updates

Table 58. GenScript Competitive Strengths & Weaknesses

Table 59. Azenta Basic Information, Manufacturing Base and Competitors

Table 60. Azenta Major Business

Table 61. Azenta IVT RNA Synthesis Service Product and Services

Table 62. Azenta IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 63. Azenta Recent Developments/Updates

Table 64. Azenta Competitive Strengths & Weaknesses

Table 65. Eurofins Scientific Basic Information, Manufacturing Base and Competitors

Table 66. Eurofins Scientific Major Business

Table 67. Eurofins Scientific IVT RNA Synthesis Service Product and Services

Table 68. Eurofins Scientific IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 69. Eurofins Scientific Recent Developments/Updates

Table 70. Eurofins Scientific Competitive Strengths & Weaknesses

Table 71. Lonza Basic Information, Manufacturing Base and Competitors

Table 72. Lonza Major Business

Table 73. Lonza IVT RNA Synthesis Service Product and Services

Table 74. Lonza IVT RNA Synthesis Service Revenue, Gross Margin and Market Share

(2021-2026) & (USD Million)

Table 75. Lonza Recent Developments/Updates

Table 76. Lonza Competitive Strengths & Weaknesses

Table 77. Thermo Fisher Scientific Basic Information, Manufacturing Base and Competitors

Table 78. Thermo Fisher Scientific Major Business

Table 79. Thermo Fisher Scientific IVT RNA Synthesis Service Product and Services

Table 80. Thermo Fisher Scientific IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 81. Thermo Fisher Scientific Recent Developments/Updates

Table 82. Thermo Fisher Scientific Competitive Strengths & Weaknesses

Table 83. Merck KGaA Basic Information, Manufacturing Base and Competitors

Table 84. Merck KGaA Major Business

Table 85. Merck KGaA IVT RNA Synthesis Service Product and Services

Table 86. Merck KGaA IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 87. Merck KGaA Recent Developments/Updates

Table 88. Merck KGaA Competitive Strengths & Weaknesses

Table 89. AGC Basic Information, Manufacturing Base and Competitors

Table 90. AGC Major Business

Table 91. AGC IVT RNA Synthesis Service Product and Services

Table 92. AGC IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 93. AGC Recent Developments/Updates

Table 94. AGC Competitive Strengths & Weaknesses

Table 95. Samsung Biologics Basic Information, Manufacturing Base and Competitors

Table 96. Samsung Biologics Major Business

Table 97. Samsung Biologics IVT RNA Synthesis Service Product and Services

Table 98. Samsung Biologics IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 99. Samsung Biologics Recent Developments/Updates

Table 100. Samsung Biologics Competitive Strengths & Weaknesses

Table 101. Recipharm Basic Information, Manufacturing Base and Competitors

Table 102. Recipharm Major Business

Table 103. Recipharm IVT RNA Synthesis Service Product and Services

Table 104. Recipharm IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 105. Recipharm Recent Developments/Updates

Table 106. Recipharm Competitive Strengths & Weaknesses

Table 107. Wacker Basic Information, Manufacturing Base and Competitors
Table 108. Wacker Major Business
Table 109. Wacker IVT RNA Synthesis Service Product and Services
Table 110. Wacker IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 111. Wacker Recent Developments/Updates
Table 112. Wacker Competitive Strengths & Weaknesses
Table 113. Curia Basic Information, Manufacturing Base and Competitors
Table 114. Curia Major Business
Table 115. Curia IVT RNA Synthesis Service Product and Services
Table 116. Curia IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 117. Curia Recent Developments/Updates
Table 118. Curia Competitive Strengths & Weaknesses
Table 119. Biomay Basic Information, Manufacturing Base and Competitors
Table 120. Biomay Major Business
Table 121. Biomay IVT RNA Synthesis Service Product and Services
Table 122. Biomay IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 123. Biomay Recent Developments/Updates
Table 124. Biomay Competitive Strengths & Weaknesses
Table 125. ARCALIS Basic Information, Manufacturing Base and Competitors
Table 126. ARCALIS Major Business
Table 127. ARCALIS IVT RNA Synthesis Service Product and Services
Table 128. ARCALIS IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 129. ARCALIS Recent Developments/Updates
Table 130. ARCALIS Competitive Strengths & Weaknesses
Table 131. VectorBuilder Basic Information, Manufacturing Base and Competitors
Table 132. VectorBuilder Major Business
Table 133. VectorBuilder IVT RNA Synthesis Service Product and Services
Table 134. VectorBuilder IVT RNA Synthesis Service Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 135. VectorBuilder Recent Developments/Updates
Table 136. VectorBuilder Competitive Strengths & Weaknesses
Table 137. Creative Biogene Basic Information, Manufacturing Base and Competitors
Table 138. Creative Biogene Major Business
Table 139. Creative Biogene IVT RNA Synthesis Service Product and Services
Table 140. Creative Biogene IVT RNA Synthesis Service Revenue, Gross Margin and

Market Share (2021-2026) & (USD Million)

Table 141. Creative Biogene Recent Developments/Updates

Table 142. Creative Biogene Competitive Strengths & Weaknesses

Table 143. Global Key Players of IVT RNA Synthesis Service Upstream (Raw Materials)

Table 144. Global IVT RNA Synthesis Service Typical Customers

List Of Figures

LIST OF FIGURES

Figure 1. IVT RNA Synthesis Service Picture

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

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

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

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

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

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

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

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

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

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

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

Figure 13. IVT RNA Synthesis Service Market Drivers

Figure 14. Factors Affecting Demand

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

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

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

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

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

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

Million)

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

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

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

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

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

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

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

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

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

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

Figure 31. Research Grade

Figure 32. Preclinical Grade

Figure 33. GMP Grade

Figure 34. Other

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

Figure 36. World IVT RNA Synthesis Service Market Size by RNA Structure, (USD Million), 2021 & 2025 & 2032

Figure 37. World IVT RNA Synthesis Service Market Size Market Share by RNA Structure in 2025

Figure 38. Linear Single-Stranded RNA

Figure 39. Circular RNA

Figure 40. Double-Stranded RNA

Figure 41. World IVT RNA Synthesis Service Market Size Market Share by RNA Structure (2021-2032)

Figure 42. World IVT RNA Synthesis Service Market Size by RNA Type, (USD Million), 2021 & 2025 & 2032

Figure 43. World IVT RNA Synthesis Service Market Size Market Share by RNA Type in

2025

Figure 44. Conventional mRNA

Figure 45. Self-Amplifying RNA

Figure 46. Other

Figure 47. World IVT RNA Synthesis Service Market Size Market Share by RNA Type (2021-2032)

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

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

Figure 50. Pharmaceutical and Biotechnology Companies

Figure 51. Academic and Research Institutes

Figure 52. Other

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

Figure 54. IVT RNA Synthesis Service Industrial Chain

Figure 55. Methodology

Figure 56. Research Process and Data Source

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