

Global Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery market size is expected to reach \$ 387 million by 2032, rising at a market growth of 5.4% CAGR during the forecast period (2026-2032).

In 2025, global sales volume of key lipid excipients for LNP-based nucleic acid drug delivery reached approximately 1,450 kg, with an average price of about 180,000 USD/kg. Key lipid excipients for LNP-based nucleic acid drug delivery refer to high-purity functional lipid raw materials used in lipid nanoparticle delivery systems, mainly including ionizable lipids, PEGylated lipids, phospholipids, sterol lipids, and other functional lipids. These products are typically supplied in GMP grade, clinical grade, research grade, or custom synthesis grade forms, and they self-assemble into stable lipid nanoparticle structures to enable nucleic acid encapsulation, protection, in vivo delivery, cellular uptake, and endosomal escape. This topic focuses on key lipid excipients used in the development and manufacturing of mRNA vaccines, mRNA therapeutics, siRNA therapeutics, gene editing products, and other nucleic acid drugs, serving as core upstream materials for formulation development, CMC scale-up, and commercial production of nucleic acid medicines.

The competitive landscape remains led by established suppliers in Europe, the United States, and Japan, especially in GMP-grade ionizable lipids, PEGylated lipids, phospholipids, and sterol-based lipid excipients. Chinese suppliers such as JenKem Technology, SINOPEG, AVT, and Huateng Pharmaceutical are becoming increasingly relevant, supported by domestic substitution demand and growing nucleic acid drug development activity. However, international validation, GMP compliance, regulatory filings, impurity control, and commercial-scale supply reliability remain key

differentiators.

Growth will be driven by the clinical advancement of therapeutic mRNA products, the expansion of siRNA and gene editing applications, and the increasing need for customized ionizable lipids and stable regional supply chains. At the same time, the market faces constraints from uncertain downstream drug commercialization timelines, patent barriers around proprietary lipids, long qualification cycles for pharmaceutical excipients, and the gap between research-grade lipid supply and commercial GMP-grade manufacturing.

This report studies the global Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery 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 Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery total production and demand, 2021-2032, (Kg)

Global Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery total production value, 2021-2032, (USD Million)

Global Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kg), (based on production site)

Global Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery consumption by region & country, CAGR, 2021-2032 & (Kg)

U.S. VS China: Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery domestic production, consumption, key domestic manufacturers and share

Global Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kg)

Global Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kg)

Global Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kg)

This report profiles key players in the global Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include CordenPharma, Croda International Plc, Merck KGaA, Evonik Industries AG, NOF CORPORATION, Lipoid GmbH, Nippon Fine Chemical Co., Ltd., ABITEC Corporation, NucleoSyn, ST Pharm Co., Ltd., 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 Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kg) and average price (US\$/Kg) by manufacturer, 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 Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Market,
Segmentation by Type:

Ionizable Lipids

PEGylated Lipids

Phospholipids

Sterols

Other Functional Lipids

Global Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Market,
Segmentation by Quality Grade:

GMP Grade

Clinical Grade

Research Grade

Custom Grade

Global Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Market,
Segmentation by Application:

mRNA Vaccines

mRNA Therapeutics

siRNA Therapeutics

Gene Editing

Other Nucleic Acid Drugs

Companies Profiled:

CordenPharma

Croda International Plc

Merck KGaA

Evonik Industries AG

NOF CORPORATION

Lipoid GmbH

Nippon Fine Chemical Co., Ltd.

ABITEC Corporation

NucleoSyn

ST Pharm Co., Ltd.

Biopharma PEG Scientific Inc.

Beijing JenKem Technology Co., Ltd.

XIAMEN SINOPEG BIOTECH CO., LTD.

AVT (SHANGHAI) PHARMACEUTICAL TECH CO., LTD

Hunan Huateng Pharmaceutical Co., Ltd.

WuXi AppTec Co., Ltd.

Shanghai Haoyuan Chemexpress Co., Ltd.

BroadPharm

BOC Sciences

Key Questions Answered:

1. How big is the global Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery market?
2. What is the demand of the global Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery market?
3. What is the year over year growth of the global Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery market?
4. What is the production and production value of the global Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery market?
5. Who are the key producers in the global Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

1.1 Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Introduction

1.2 World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Supply & Forecast

1.2.1 World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value (2021 & 2025 & 2032)

1.2.2 World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (2021-2032)

1.2.3 World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Pricing Trends (2021-2032)

1.3 World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production by Region (Based on Production Site)

1.3.1 World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value by Region (2021-2032)

1.3.2 World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production by Region (2021-2032)

1.3.3 World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Average Price by Region (2021-2032)

1.3.4 North America Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (2021-2032)

1.3.5 Europe Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (2021-2032)

1.3.6 China Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (2021-2032)

1.3.7 Japan Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (2021-2032)

1.4 Market Drivers, Restraints and Trends

1.4.1 Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Market Drivers

1.4.2 Factors Affecting Demand

1.4.3 Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Major Market Trends

2 DEMAND SUMMARY

2.1 World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Demand (2021-2032)

2.2 World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Consumption by Region

2.2.1 World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Consumption by Region (2021-2026)

2.2.2 World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Consumption Forecast by Region (2027-2032)

2.3 United States Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Consumption (2021-2032)

2.4 China Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Consumption (2021-2032)

2.5 Europe Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Consumption (2021-2032)

2.6 Japan Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Consumption (2021-2032)

2.7 South Korea Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Consumption (2021-2032)

2.8 ASEAN Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Consumption (2021-2032)

2.9 India Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value by Manufacturer (2021-2026)

3.2 World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production by Manufacturer (2021-2026)

3.3 World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Average Price by Manufacturer (2021-2026)

3.4 Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery in 2025

3.5.3 Global Concentration Ratios (CR8) for Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery in 2025

3.6 Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Market: Overall

Company Footprint Analysis

3.6.1 Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Market: Region Footprint

3.6.2 Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Market: Company Product Type Footprint

3.6.3 Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Market: Company Product Application Footprint

3.7 Competitive Environment

3.7.1 Historical Structure of the Industry

3.7.2 Barriers of Market Entry

3.7.3 Factors of Competition

3.8 New Entrant and Capacity Expansion Plans

3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value Comparison

4.1.1 United States VS China: Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Comparison

4.2.1 United States VS China: Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Consumption Comparison

4.3.1 United States VS China: Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Key Lipid Excipients for LNP-Based Nucleic

Acid Drug Delivery Production Value (2021-2026)

4.4.3 United States Based Manufacturers Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (2021-2026)

4.5 China Based Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Manufacturers and Market Share

4.5.1 China Based Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value (2021-2026)

4.5.3 China Based Manufacturers Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (2021-2026)

4.6 Rest of World Based Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Ionizable Lipids

5.2.2 PEGylated Lipids

5.2.3 Phospholipids

5.2.4 Sterols

5.2.5 Other Functional Lipids

5.3 Market Segment by Type

5.3.1 World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production by Type (2021-2032)

5.3.2 World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value by Type (2021-2032)

5.3.3 World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY QUALITY GRADE

6.1 World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Market Size Overview by Quality Grade: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Quality Grade

6.2.1 GMP Grade

6.2.2 Clinical Grade

6.2.3 Research Grade

6.2.4 Custom Grade

6.3 Market Segment by Quality Grade

6.3.1 World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production by Quality Grade (2021-2032)

6.3.2 World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value by Quality Grade (2021-2032)

6.3.3 World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Average Price by Quality Grade (2021-2032)

7 MARKET ANALYSIS BY APPLICATION

7.1 World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Market Size Overview by Application: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Application

7.2.1 mRNA Vaccines

7.2.2 mRNA Therapeutics

7.2.3 siRNA Therapeutics

7.2.4 Gene Editing

7.2.5 Other Nucleic Acid Drugs

7.3 Market Segment by Application

7.3.1 World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production by Application (2021-2032)

7.3.2 World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value by Application (2021-2032)

7.3.3 World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Average Price by Application (2021-2032)

8 COMPANY PROFILES

8.1 CordenPharma

8.1.1 CordenPharma Details

8.1.2 CordenPharma Major Business

8.1.3 CordenPharma Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services

8.1.4 CordenPharma Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.1.5 CordenPharma Recent Developments/Updates

8.1.6 CordenPharma Competitive Strengths & Weaknesses

8.2 Croda International Plc

8.2.1 Croda International Plc Details

8.2.2 Croda International Plc Major Business

8.2.3 Croda International Plc Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services

8.2.4 Croda International Plc Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.2.5 Croda International Plc Recent Developments/Updates

8.2.6 Croda International Plc Competitive Strengths & Weaknesses

8.3 Merck KGaA

8.3.1 Merck KGaA Details

8.3.2 Merck KGaA Major Business

8.3.3 Merck KGaA Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services

8.3.4 Merck KGaA Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.3.5 Merck KGaA Recent Developments/Updates

8.3.6 Merck KGaA Competitive Strengths & Weaknesses

8.4 Evonik Industries AG

8.4.1 Evonik Industries AG Details

8.4.2 Evonik Industries AG Major Business

8.4.3 Evonik Industries AG Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services

8.4.4 Evonik Industries AG Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.4.5 Evonik Industries AG Recent Developments/Updates

8.4.6 Evonik Industries AG Competitive Strengths & Weaknesses

8.5 NOF CORPORATION

8.5.1 NOF CORPORATION Details

8.5.2 NOF CORPORATION Major Business

8.5.3 NOF CORPORATION Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services

8.5.4 NOF CORPORATION Key Lipid Excipients for LNP-Based Nucleic Acid Drug

Delivery Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.5.5 NOF CORPORATION Recent Developments/Updates

8.5.6 NOF CORPORATION Competitive Strengths & Weaknesses

8.6 Lipoid GmbH

8.6.1 Lipoid GmbH Details

8.6.2 Lipoid GmbH Major Business

8.6.3 Lipoid GmbH Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services

8.6.4 Lipoid GmbH Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.6.5 Lipoid GmbH Recent Developments/Updates

8.6.6 Lipoid GmbH Competitive Strengths & Weaknesses

8.7 Nippon Fine Chemical Co., Ltd.

8.7.1 Nippon Fine Chemical Co., Ltd. Details

8.7.2 Nippon Fine Chemical Co., Ltd. Major Business

8.7.3 Nippon Fine Chemical Co., Ltd. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services

8.7.4 Nippon Fine Chemical Co., Ltd. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.7.5 Nippon Fine Chemical Co., Ltd. Recent Developments/Updates

8.7.6 Nippon Fine Chemical Co., Ltd. Competitive Strengths & Weaknesses

8.8 ABITEC Corporation

8.8.1 ABITEC Corporation Details

8.8.2 ABITEC Corporation Major Business

8.8.3 ABITEC Corporation Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services

8.8.4 ABITEC Corporation Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.8.5 ABITEC Corporation Recent Developments/Updates

8.8.6 ABITEC Corporation Competitive Strengths & Weaknesses

8.9 NucleoSyn

8.9.1 NucleoSyn Details

8.9.2 NucleoSyn Major Business

8.9.3 NucleoSyn Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services

8.9.4 NucleoSyn Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.9.5 NucleoSyn Recent Developments/Updates

8.9.6 NucleoSyn Competitive Strengths & Weaknesses

8.10 ST Pharm Co., Ltd.

8.10.1 ST Pharm Co., Ltd. Details

8.10.2 ST Pharm Co., Ltd. Major Business

8.10.3 ST Pharm Co., Ltd. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services

8.10.4 ST Pharm Co., Ltd. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.10.5 ST Pharm Co., Ltd. Recent Developments/Updates

8.10.6 ST Pharm Co., Ltd. Competitive Strengths & Weaknesses

8.11 Biopharma PEG Scientific Inc.

8.11.1 Biopharma PEG Scientific Inc. Details

8.11.2 Biopharma PEG Scientific Inc. Major Business

8.11.3 Biopharma PEG Scientific Inc. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services

8.11.4 Biopharma PEG Scientific Inc. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.11.5 Biopharma PEG Scientific Inc. Recent Developments/Updates

8.11.6 Biopharma PEG Scientific Inc. Competitive Strengths & Weaknesses

8.12 Beijing JenKem Technology Co., Ltd.

8.12.1 Beijing JenKem Technology Co., Ltd. Details

8.12.2 Beijing JenKem Technology Co., Ltd. Major Business

8.12.3 Beijing JenKem Technology Co., Ltd. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services

8.12.4 Beijing JenKem Technology Co., Ltd. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.12.5 Beijing JenKem Technology Co., Ltd. Recent Developments/Updates

8.12.6 Beijing JenKem Technology Co., Ltd. Competitive Strengths & Weaknesses

8.13 XIAMEN SINOPEG BIOTECH CO., LTD.

8.13.1 XIAMEN SINOPEG BIOTECH CO., LTD. Details

8.13.2 XIAMEN SINOPEG BIOTECH CO., LTD. Major Business

8.13.3 XIAMEN SINOPEG BIOTECH CO., LTD. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services

8.13.4 XIAMEN SINOPEG BIOTECH CO., LTD. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.13.5 XIAMEN SINOPEG BIOTECH CO., LTD. Recent Developments/Updates

8.13.6 XIAMEN SINOPEG BIOTECH CO., LTD. Competitive Strengths & Weaknesses

8.14 AVT (SHANGHAI) PHARMACEUTICAL TECH CO., LTD

- 8.14.1 AVT (SHANGHAI) PHARMACEUTICAL TECH CO., LTD Details
- 8.14.2 AVT (SHANGHAI) PHARMACEUTICAL TECH CO., LTD Major Business
- 8.14.3 AVT (SHANGHAI) PHARMACEUTICAL TECH CO., LTD Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services
- 8.14.4 AVT (SHANGHAI) PHARMACEUTICAL TECH CO., LTD Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 8.14.5 AVT (SHANGHAI) PHARMACEUTICAL TECH CO., LTD Recent Developments/Updates
- 8.14.6 AVT (SHANGHAI) PHARMACEUTICAL TECH CO., LTD Competitive Strengths & Weaknesses
- 8.15 Hunan Huateng Pharmaceutical Co., Ltd.
- 8.15.1 Hunan Huateng Pharmaceutical Co., Ltd. Details
- 8.15.2 Hunan Huateng Pharmaceutical Co., Ltd. Major Business
- 8.15.3 Hunan Huateng Pharmaceutical Co., Ltd. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services
- 8.15.4 Hunan Huateng Pharmaceutical Co., Ltd. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 8.15.5 Hunan Huateng Pharmaceutical Co., Ltd. Recent Developments/Updates
- 8.15.6 Hunan Huateng Pharmaceutical Co., Ltd. Competitive Strengths & Weaknesses
- 8.16 WuXi AppTec Co., Ltd.
- 8.16.1 WuXi AppTec Co., Ltd. Details
- 8.16.2 WuXi AppTec Co., Ltd. Major Business
- 8.16.3 WuXi AppTec Co., Ltd. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services
- 8.16.4 WuXi AppTec Co., Ltd. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 8.16.5 WuXi AppTec Co., Ltd. Recent Developments/Updates
- 8.16.6 WuXi AppTec Co., Ltd. Competitive Strengths & Weaknesses
- 8.17 Shanghai Haoyuan Chemexpress Co., Ltd.
- 8.17.1 Shanghai Haoyuan Chemexpress Co., Ltd. Details
- 8.17.2 Shanghai Haoyuan Chemexpress Co., Ltd. Major Business
- 8.17.3 Shanghai Haoyuan Chemexpress Co., Ltd. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services
- 8.17.4 Shanghai Haoyuan Chemexpress Co., Ltd. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 8.17.5 Shanghai Haoyuan Chemexpress Co., Ltd. Recent Developments/Updates

8.17.6 Shanghai Haoyuan Chemexpress Co., Ltd. Competitive Strengths & Weaknesses

8.18 BroadPharm

8.18.1 BroadPharm Details

8.18.2 BroadPharm Major Business

8.18.3 BroadPharm Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services

8.18.4 BroadPharm Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.18.5 BroadPharm Recent Developments/Updates

8.18.6 BroadPharm Competitive Strengths & Weaknesses

8.19 BOC Sciences

8.19.1 BOC Sciences Details

8.19.2 BOC Sciences Major Business

8.19.3 BOC Sciences Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services

8.19.4 BOC Sciences Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.19.5 BOC Sciences Recent Developments/Updates

8.19.6 BOC Sciences Competitive Strengths & Weaknesses

9 INDUSTRY CHAIN ANALYSIS

9.1 Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Industry Chain

9.2 Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Upstream Analysis

9.2.1 Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Core Raw Materials

9.2.2 Main Manufacturers of Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Core Raw Materials

9.3 Midstream Analysis

9.4 Downstream Analysis

9.5 Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Mode

9.6 Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Procurement Model

9.7 Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Industry Sales Model and Sales Channels

9.7.1 Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Sales Model

9.7.2 Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Typical Distributors

10 RESEARCH FINDINGS AND CONCLUSION

11 APPENDIX

11.1 Methodology

11.2 Research Process and Data Source

11.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value by Region (2021-2026) & (USD Million)

Table 3. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value by Region (2027-2032) & (USD Million)

Table 4. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value Market Share by Region (2021-2026)

Table 5. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value Market Share by Region (2027-2032)

Table 6. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production by Region (2021-2026) & (Kg)

Table 7. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production by Region (2027-2032) & (Kg)

Table 8. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Market Share by Region (2021-2026)

Table 9. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Market Share by Region (2027-2032)

Table 10. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Average Price by Region (2021-2026) & (US\$/Kg)

Table 11. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Average Price by Region (2027-2032) & (US\$/Kg)

Table 12. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Major Market Trends

Table 13. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Kg)

Table 14. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Consumption by Region (2021-2026) & (Kg)

Table 15. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Consumption Forecast by Region (2027-2032) & (Kg)

Table 16. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Producers in 2025

Table 18. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery

Production by Manufacturer (2021-2026) & (Kg)

Table 19. Production Market Share of Key Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Producers in 2025

Table 20. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Average Price by Manufacturer (2021-2026) & (US\$/Kg)

Table 21. Global Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Company Evaluation Quadrant

Table 22. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Site of Key Manufacturer

Table 24. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Market: Company Product Type Footprint

Table 25. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Market: Company Product Application Footprint

Table 26. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Competitive Factors

Table 27. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery New Entrant and Capacity Expansion Plans

Table 28. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Mergers & Acquisitions Activity

Table 29. United States VS China Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Comparison, (2021 & 2025 & 2032) & (Kg)

Table 31. United States VS China Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Consumption Comparison, (2021 & 2025 & 2032) & (Kg)

Table 32. United States Based Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (2021-2026) & (Kg)

Table 36. United States Based Manufacturers Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Market Share (2021-2026)

Table 37. China Based Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production, (2021-2026) & (Kg)

Table 41. China Based Manufacturers Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Market Share (2021-2026)

Table 42. Rest of World Based Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production, (2021-2026) & (Kg)

Table 46. Rest of World Based Manufacturers Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Market Share (2021-2026)

Table 47. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production by Type (2021-2026) & (Kg)

Table 49. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production by Type (2027-2032) & (Kg)

Table 50. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value by Type (2021-2026) & (USD Million)

Table 51. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value by Type (2027-2032) & (USD Million)

Table 52. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Average Price by Type (2021-2026) & (US\$/Kg)

Table 53. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Average Price by Type (2027-2032) & (US\$/Kg)

Table 54. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value by Quality Grade, (USD Million), 2021 & 2025 & 2032

Table 55. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production by Quality Grade (2021-2026) & (Kg)

Table 56. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production by Quality Grade (2027-2032) & (Kg)

Table 57. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery

Production Value by Quality Grade (2021-2026) & (USD Million)

Table 58. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery

Production Value by Quality Grade (2027-2032) & (USD Million)

Table 59. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery

Average Price by Quality Grade (2021-2026) & (US\$/Kg)

Table 60. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery

Average Price by Quality Grade (2027-2032) & (US\$/Kg)

Table 61. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery

Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 62. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery

Production by Application (2021-2026) & (Kg)

Table 63. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery

Production by Application (2027-2032) & (Kg)

Table 64. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery

Production Value by Application (2021-2026) & (USD Million)

Table 65. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery

Production Value by Application (2027-2032) & (USD Million)

Table 66. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery

Average Price by Application (2021-2026) & (US\$/Kg)

Table 67. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery

Average Price by Application (2027-2032) & (US\$/Kg)

Table 68. CordenPharma Basic Information, Manufacturing Base and Competitors

Table 69. CordenPharma Major Business

Table 70. CordenPharma Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services

Table 71. CordenPharma Key Lipid Excipients for LNP-Based Nucleic Acid Drug

Delivery Production (Kg), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 72. CordenPharma Recent Developments/Updates

Table 73. CordenPharma Competitive Strengths & Weaknesses

Table 74. Croda International Plc Basic Information, Manufacturing Base and Competitors

Table 75. Croda International Plc Major Business

Table 76. Croda International Plc Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services

Table 77. Croda International Plc Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (Kg), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 78. Croda International Plc Recent Developments/Updates

Table 79. Croda International Plc Competitive Strengths & Weaknesses
Table 80. Merck KGaA Basic Information, Manufacturing Base and Competitors
Table 81. Merck KGaA Major Business
Table 82. Merck KGaA Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services
Table 83. Merck KGaA Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (Kg), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 84. Merck KGaA Recent Developments/Updates
Table 85. Merck KGaA Competitive Strengths & Weaknesses
Table 86. Evonik Industries AG Basic Information, Manufacturing Base and Competitors
Table 87. Evonik Industries AG Major Business
Table 88. Evonik Industries AG Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services
Table 89. Evonik Industries AG Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (Kg), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 90. Evonik Industries AG Recent Developments/Updates
Table 91. Evonik Industries AG Competitive Strengths & Weaknesses
Table 92. NOF CORPORATION Basic Information, Manufacturing Base and Competitors
Table 93. NOF CORPORATION Major Business
Table 94. NOF CORPORATION Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services
Table 95. NOF CORPORATION Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (Kg), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 96. NOF CORPORATION Recent Developments/Updates
Table 97. NOF CORPORATION Competitive Strengths & Weaknesses
Table 98. Lipoid GmbH Basic Information, Manufacturing Base and Competitors
Table 99. Lipoid GmbH Major Business
Table 100. Lipoid GmbH Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services
Table 101. Lipoid GmbH Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (Kg), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 102. Lipoid GmbH Recent Developments/Updates
Table 103. Lipoid GmbH Competitive Strengths & Weaknesses
Table 104. Nippon Fine Chemical Co., Ltd. Basic Information, Manufacturing Base and

Competitors

Table 105. Nippon Fine Chemical Co., Ltd. Major Business

Table 106. Nippon Fine Chemical Co., Ltd. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services

Table 107. Nippon Fine Chemical Co., Ltd. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (Kg), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 108. Nippon Fine Chemical Co., Ltd. Recent Developments/Updates

Table 109. Nippon Fine Chemical Co., Ltd. Competitive Strengths & Weaknesses

Table 110. ABITEC Corporation Basic Information, Manufacturing Base and Competitors

Table 111. ABITEC Corporation Major Business

Table 112. ABITEC Corporation Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services

Table 113. ABITEC Corporation Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (Kg), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 114. ABITEC Corporation Recent Developments/Updates

Table 115. ABITEC Corporation Competitive Strengths & Weaknesses

Table 116. NucleoSyn Basic Information, Manufacturing Base and Competitors

Table 117. NucleoSyn Major Business

Table 118. NucleoSyn Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services

Table 119. NucleoSyn Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (Kg), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 120. NucleoSyn Recent Developments/Updates

Table 121. NucleoSyn Competitive Strengths & Weaknesses

Table 122. ST Pharm Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 123. ST Pharm Co., Ltd. Major Business

Table 124. ST Pharm Co., Ltd. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services

Table 125. ST Pharm Co., Ltd. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (Kg), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 126. ST Pharm Co., Ltd. Recent Developments/Updates

Table 127. ST Pharm Co., Ltd. Competitive Strengths & Weaknesses

Table 128. Biopharma PEG Scientific Inc. Basic Information, Manufacturing Base and Competitors

Table 129. Biopharma PEG Scientific Inc. Major Business
Table 130. Biopharma PEG Scientific Inc. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services
Table 131. Biopharma PEG Scientific Inc. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (Kg), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 132. Biopharma PEG Scientific Inc. Recent Developments/Updates
Table 133. Biopharma PEG Scientific Inc. Competitive Strengths & Weaknesses
Table 134. Beijing JenKem Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 135. Beijing JenKem Technology Co., Ltd. Major Business
Table 136. Beijing JenKem Technology Co., Ltd. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services
Table 137. Beijing JenKem Technology Co., Ltd. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (Kg), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 138. Beijing JenKem Technology Co., Ltd. Recent Developments/Updates
Table 139. Beijing JenKem Technology Co., Ltd. Competitive Strengths & Weaknesses
Table 140. XIAMEN SINOPEG BIOTECH CO., LTD. Basic Information, Manufacturing Base and Competitors
Table 141. XIAMEN SINOPEG BIOTECH CO., LTD. Major Business
Table 142. XIAMEN SINOPEG BIOTECH CO., LTD. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services
Table 143. XIAMEN SINOPEG BIOTECH CO., LTD. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (Kg), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 144. XIAMEN SINOPEG BIOTECH CO., LTD. Recent Developments/Updates
Table 145. XIAMEN SINOPEG BIOTECH CO., LTD. Competitive Strengths & Weaknesses
Table 146. AVT (SHANGHAI) PHARMACEUTICAL TECH CO., LTD Basic Information, Manufacturing Base and Competitors
Table 147. AVT (SHANGHAI) PHARMACEUTICAL TECH CO., LTD Major Business
Table 148. AVT (SHANGHAI) PHARMACEUTICAL TECH CO., LTD Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services
Table 149. AVT (SHANGHAI) PHARMACEUTICAL TECH CO., LTD Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (Kg), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 150. AVT (SHANGHAI) PHARMACEUTICAL TECH CO., LTD Recent Developments/Updates

Table 151. AVT (SHANGHAI) PHARMACEUTICAL TECH CO., LTD Competitive Strengths & Weaknesses

Table 152. Hunan Huateng Pharmaceutical Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 153. Hunan Huateng Pharmaceutical Co., Ltd. Major Business

Table 154. Hunan Huateng Pharmaceutical Co., Ltd. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services

Table 155. Hunan Huateng Pharmaceutical Co., Ltd. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (Kg), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 156. Hunan Huateng Pharmaceutical Co., Ltd. Recent Developments/Updates

Table 157. Hunan Huateng Pharmaceutical Co., Ltd. Competitive Strengths & Weaknesses

Table 158. WuXi AppTec Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 159. WuXi AppTec Co., Ltd. Major Business

Table 160. WuXi AppTec Co., Ltd. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services

Table 161. WuXi AppTec Co., Ltd. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (Kg), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 162. WuXi AppTec Co., Ltd. Recent Developments/Updates

Table 163. WuXi AppTec Co., Ltd. Competitive Strengths & Weaknesses

Table 164. Shanghai Haoyuan Chemexpress Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 165. Shanghai Haoyuan Chemexpress Co., Ltd. Major Business

Table 166. Shanghai Haoyuan Chemexpress Co., Ltd. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services

Table 167. Shanghai Haoyuan Chemexpress Co., Ltd. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (Kg), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 168. Shanghai Haoyuan Chemexpress Co., Ltd. Recent Developments/Updates

Table 169. Shanghai Haoyuan Chemexpress Co., Ltd. Competitive Strengths & Weaknesses

Table 170. BroadPharm Basic Information, Manufacturing Base and Competitors

Table 171. BroadPharm Major Business

Table 172. BroadPharm Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services

Table 173. BroadPharm Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery

Production (Kg), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 174. BroadPharm Recent Developments/Updates

Table 175. BroadPharm Competitive Strengths & Weaknesses

Table 176. BOC Sciences Basic Information, Manufacturing Base and Competitors

Table 177. BOC Sciences Major Business

Table 178. BOC Sciences Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Product and Services

Table 179. BOC Sciences Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (Kg), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 180. BOC Sciences Recent Developments/Updates

Table 181. BOC Sciences Competitive Strengths & Weaknesses

Table 182. Global Key Players of Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Upstream (Raw Materials)

Table 183. Global Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Typical Customers

Table 184. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Typical Distributors

List Of Figures

LIST OF FIGURES

- Figure 1. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Picture
- Figure 2. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value: 2021 & 2025 & 2032, (USD Million)
- Figure 3. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value and Forecast (2021-2032) & (USD Million)
- Figure 4. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (2021-2032) & (Kg)
- Figure 5. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Average Price (2021-2032) & (US\$/Kg)
- Figure 6. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value Market Share by Region (2021-2032)
- Figure 7. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Market Share by Region (2021-2032)
- Figure 8. North America Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (2021-2032) & (Kg)
- Figure 9. Europe Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (2021-2032) & (Kg)
- Figure 10. China Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (2021-2032) & (Kg)
- Figure 11. Japan Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production (2021-2032) & (Kg)
- Figure 12. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Market Drivers
- Figure 13. Factors Affecting Demand
- Figure 14. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Consumption (2021-2032) & (Kg)
- Figure 15. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Consumption Market Share by Region (2021-2032)
- Figure 16. United States Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Consumption (2021-2032) & (Kg)
- Figure 17. China Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Consumption (2021-2032) & (Kg)
- Figure 18. Europe Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Consumption (2021-2032) & (Kg)
- Figure 19. Japan Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery

Consumption (2021-2032) & (Kg)

Figure 20. South Korea Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Consumption (2021-2032) & (Kg)

Figure 21. ASEAN Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Consumption (2021-2032) & (Kg)

Figure 22. India Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Consumption (2021-2032) & (Kg)

Figure 23. Producer Shipments of Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Markets in 2025

Figure 26. United States VS China: Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Market Share 2025

Figure 30. China Based Manufacturers Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Market Share 2025

Figure 32. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value Market Share by Type in 2025

Figure 34. Ionizable Lipids

Figure 35. PEGylated Lipids

Figure 36. Phospholipids

Figure 37. Sterols

Figure 38. Other Functional Lipids

Figure 39. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Market Share by Type (2021-2032)

Figure 40. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value Market Share by Type (2021-2032)

Figure 41. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery

Average Price by Type (2021-2032) & (US\$/Kg)

Figure 42. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value by Quality Grade, (USD Million), 2021 & 2025 & 2032

Figure 43. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value Market Share by Quality Grade in 2025

Figure 44. GMP Grade

Figure 45. Clinical Grade

Figure 46. Research Grade

Figure 47. Custom Grade

Figure 48. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Market Share by Quality Grade (2021-2032)

Figure 49. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value Market Share by Quality Grade (2021-2032)

Figure 50. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Average Price by Quality Grade (2021-2032) & (US\$/Kg)

Figure 51. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 52. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value Market Share by Application in 2025

Figure 53. mRNA Vaccines

Figure 54. mRNA Therapeutics

Figure 55. siRNA Therapeutics

Figure 56. Gene Editing

Figure 57. Other Nucleic Acid Drugs

Figure 58. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Market Share by Application (2021-2032)

Figure 59. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Production Value Market Share by Application (2021-2032)

Figure 60. World Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Average Price by Application (2021-2032) & (US\$/Kg)

Figure 61. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Industry Chain

Figure 62. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Procurement Model

Figure 63. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Sales Model

Figure 64. Key Lipid Excipients for LNP-Based Nucleic Acid Drug Delivery Sales Channels, Direct Sales, and Distribution

Figure 65. Methodology

Figure 66. Research Process and Data Source

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