

Global Oligonucleotide Purification Media Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Oligonucleotide Purification Media market size was valued at US\$ 129 million in 2025 and is forecast to a readjusted size of US\$ 359 million by 2032 with a CAGR of 15.6% during review period.

Oligonucleotide purification media are chromatographic stationary phases based on agarose, polymer beads, silica, or hybrid silica microspheres. These media are functionalized with quaternary ammonium (Q), DEAE, C18, hydrophobic interaction ligands, or mixed-mode chemistries to enable separation and purification of synthetic oligonucleotides such as DNA/RNA fragments, ASOs (antisense oligonucleotides), siRNA, and aptamers. They are used to remove truncated sequences, salts, protecting group residues, and related synthesis impurities. Key process modes include DMT-off anion exchange, DMT-on reversed-phase or hydrophobic purification, desalting, process scale-up purification, and quality control analytics. The estimated gross margin is approximately 60%.

Oligonucleotide purification media represent a high-barrier sub-segment within chromatography materials. Although the market size is smaller than Protein A resins and general ion-exchange media, it imposes significantly higher requirements on resolution, alkali stability, batch-to-batch consistency, process scalability under pressure constraints, and regulatory documentation. As small nucleic acid therapeutics transition from clinical development to commercial production, purification workflows are evolving from laboratory-scale methods toward scalable low-pressure chromatography, preparative liquid chromatography, and even continuous processing systems. This transition is driving the shift of specialized media from method-development

consumables to critical manufacturing materials.

Demand is primarily driven by ASOs, siRNA, RNA fragments, aptamers, and diagnostic oligonucleotides. Customers evaluate these media not only based on particle size and cost, but more importantly on separation efficiency between target sequences and N-1/N+1 impurities, compatibility with DMT-on or DMT-off workflows, cleaning and regeneration stability, solvent compatibility, and yield after scale-up. As a result, strong anion-exchange, polymer-based reversed-phase, hydrophobic interaction, and mixed-mode media all coexist, as no single platform can cover all sequence lengths and chemical modifications.

The competitive landscape remains dominated by global chromatography and life science tool companies. Domestic manufacturers are gradually entering through monodisperse polymer microspheres, ion-exchange platforms, and integrated workflow solutions. In the short term, international suppliers maintain advantages in commercial manufacturing projects and validated regulatory documentation. In the long term, domestic players that can demonstrate kilogram-scale batch production, DMT workflow compatibility, salt-form conversion stability, and customer-validated manufacturing case studies may increase penetration in development and pilot-scale production segments.

This report is a detailed and comprehensive analysis for global Oligonucleotide Purification Media market. Both quantitative and qualitative analyses are presented by manufacturers, 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 Oligonucleotide Purification Media market size and forecasts, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global Oligonucleotide Purification Media market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global Oligonucleotide Purification Media market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (kg), and average selling

prices (US\$/kg), 2021-2032

Global Oligonucleotide Purification Media market shares of main players, shipments in revenue (\$ Million), sales quantity (kg), and ASP (US\$/kg), 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 Oligonucleotide Purification Media

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 Oligonucleotide Purification Media market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Cytiva, DuPont, Bio-Rad, Bio-Works, YMC, Tosoh Bioscience, Agilent, Thermo Fisher Scientific, Waters, NanoMicro, etc.

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

Market Segmentation

Oligonucleotide Purification Media 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 in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Strong Anion Exchange Media

Weak Anion Exchange Media

Reversed-Phase Media

Hydrophobic Interaction Media

Mixed-Mode Media

Size Exclusion Media

Market segment by Base Matrix

Agarose-Based Media

Polymer-Based Media

Silica and Hybrid Silica-Based Media

Dextran-Based Media

Other Base Matrix Media

Market segment by Particle Size Range

Sub-10 μ m Media

10-40 μ m Media

40-90 μ m Media

Above 90 μ m Media

Market segment by Ligand and Surface Chemistry

Quaternary Amine Ligand Media

Tertiary Amine and DEAE Ligand Media

Hydrophobic Polymer Media

C18 Bonded Media

Multimodal Ligand Media

Unfunctionalized Desalting Media

Market segment by Application

Therapeutic Oligonucleotide Manufacturing

Diagnostic and Research Oligo Purification

Process Development and Scale-Up

Impurity Removal and Polishing

Desalting and Buffer Exchange

Quality Control and Analytical Fractionation

Major players covered

Cytiva

DuPont

Bio-Rad

Bio-Works

YMC

Tosoh Bioscience

Agilent

Thermo Fisher Scientific

Waters

NanoMicro

Bestchrom

Smart Lifesciences

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Oligonucleotide Purification Media product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Oligonucleotide Purification Media, with price, sales quantity, revenue, and global market share of Oligonucleotide Purification Media from 2021 to 2026.

Chapter 3, the Oligonucleotide Purification Media competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Oligonucleotide Purification Media breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Oligonucleotide Purification Media market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Oligonucleotide Purification Media.

Chapter 14 and 15, to describe Oligonucleotide Purification Media sales channel, distributors, customers, research findings and conclusion.

Contents

1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Market Analysis by Type

1.3.1 Overview: Global Oligonucleotide Purification Media Consumption Value by Type: 2021 Versus 2025 Versus 2032

1.3.2 Strong Anion Exchange Media

1.3.3 Weak Anion Exchange Media

1.3.4 Reversed-Phase Media

1.3.5 Hydrophobic Interaction Media

1.3.6 Mixed-Mode Media

1.3.7 Size Exclusion Media

1.4 Market Analysis by Base Matrix

1.4.1 Overview: Global Oligonucleotide Purification Media Consumption Value by Base Matrix: 2021 Versus 2025 Versus 2032

1.4.2 Agarose-Based Media

1.4.3 Polymer-Based Media

1.4.4 Silica and Hybrid Silica-Based Media

1.4.5 Dextran-Based Media

1.4.6 Other Base Matrix Media

1.5 Market Analysis by Particle Size Range

1.5.1 Overview: Global Oligonucleotide Purification Media Consumption Value by Particle Size Range: 2021 Versus 2025 Versus 2032

1.5.2 Sub-10 μ m Media

1.5.3 10-40 μ m Media

1.5.4 40-90 μ m Media

1.5.5 Above 90 μ m Media

1.6 Market Analysis by Ligand and Surface Chemistry

1.6.1 Overview: Global Oligonucleotide Purification Media Consumption Value by Ligand and Surface Chemistry: 2021 Versus 2025 Versus 2032

1.6.2 Quaternary Amine Ligand Media

1.6.3 Tertiary Amine and DEAE Ligand Media

1.6.4 Hydrophobic Polymer Media

1.6.5 C18 Bonded Media

1.6.6 Multimodal Ligand Media

1.6.7 Unfunctionalized Desalting Media

1.7 Market Analysis by Application

1.7.1 Overview: Global Oligonucleotide Purification Media Consumption Value by Application: 2021 Versus 2025 Versus 2032

1.7.2 Therapeutic Oligonucleotide Manufacturing

1.7.3 Diagnostic and Research Oligo Purification

1.7.4 Process Development and Scale-Up

1.7.5 Impurity Removal and Polishing

1.7.6 Desalting and Buffer Exchange

1.7.7 Quality Control and Analytical Fractionation

1.8 Global Oligonucleotide Purification Media Market Size & Forecast

1.8.1 Global Oligonucleotide Purification Media Consumption Value (2021 & 2025 & 2032)

1.8.2 Global Oligonucleotide Purification Media Sales Quantity (2021-2032)

1.8.3 Global Oligonucleotide Purification Media Average Price (2021-2032)

2 MANUFACTURERS PROFILES

2.1 Cytiva

2.1.1 Cytiva Details

2.1.2 Cytiva Major Business

2.1.3 Cytiva Oligonucleotide Purification Media Product and Services

2.1.4 Cytiva Oligonucleotide Purification Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.1.5 Cytiva Recent Developments/Updates

2.2 DuPont

2.2.1 DuPont Details

2.2.2 DuPont Major Business

2.2.3 DuPont Oligonucleotide Purification Media Product and Services

2.2.4 DuPont Oligonucleotide Purification Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.2.5 DuPont Recent Developments/Updates

2.3 Bio-Rad

2.3.1 Bio-Rad Details

2.3.2 Bio-Rad Major Business

2.3.3 Bio-Rad Oligonucleotide Purification Media Product and Services

2.3.4 Bio-Rad Oligonucleotide Purification Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.3.5 Bio-Rad Recent Developments/Updates

2.4 Bio-Works

- 2.4.1 Bio-Works Details
- 2.4.2 Bio-Works Major Business
- 2.4.3 Bio-Works Oligonucleotide Purification Media Product and Services
- 2.4.4 Bio-Works Oligonucleotide Purification Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.4.5 Bio-Works Recent Developments/Updates
- 2.5 YMC
 - 2.5.1 YMC Details
 - 2.5.2 YMC Major Business
 - 2.5.3 YMC Oligonucleotide Purification Media Product and Services
 - 2.5.4 YMC Oligonucleotide Purification Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.5.5 YMC Recent Developments/Updates
- 2.6 Tosoh Bioscience
 - 2.6.1 Tosoh Bioscience Details
 - 2.6.2 Tosoh Bioscience Major Business
 - 2.6.3 Tosoh Bioscience Oligonucleotide Purification Media Product and Services
 - 2.6.4 Tosoh Bioscience Oligonucleotide Purification Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.6.5 Tosoh Bioscience Recent Developments/Updates
- 2.7 Agilent
 - 2.7.1 Agilent Details
 - 2.7.2 Agilent Major Business
 - 2.7.3 Agilent Oligonucleotide Purification Media Product and Services
 - 2.7.4 Agilent Oligonucleotide Purification Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.7.5 Agilent Recent Developments/Updates
- 2.8 Thermo Fisher Scientific
 - 2.8.1 Thermo Fisher Scientific Details
 - 2.8.2 Thermo Fisher Scientific Major Business
 - 2.8.3 Thermo Fisher Scientific Oligonucleotide Purification Media Product and Services
 - 2.8.4 Thermo Fisher Scientific Oligonucleotide Purification Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.8.5 Thermo Fisher Scientific Recent Developments/Updates
- 2.9 Waters
 - 2.9.1 Waters Details
 - 2.9.2 Waters Major Business
 - 2.9.3 Waters Oligonucleotide Purification Media Product and Services

2.9.4 Waters Oligonucleotide Purification Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.9.5 Waters Recent Developments/Updates

2.10 NanoMicro

2.10.1 NanoMicro Details

2.10.2 NanoMicro Major Business

2.10.3 NanoMicro Oligonucleotide Purification Media Product and Services

2.10.4 NanoMicro Oligonucleotide Purification Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.10.5 NanoMicro Recent Developments/Updates

2.11 Bestchrom

2.11.1 Bestchrom Details

2.11.2 Bestchrom Major Business

2.11.3 Bestchrom Oligonucleotide Purification Media Product and Services

2.11.4 Bestchrom Oligonucleotide Purification Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.11.5 Bestchrom Recent Developments/Updates

2.12 Smart Lifesciences

2.12.1 Smart Lifesciences Details

2.12.2 Smart Lifesciences Major Business

2.12.3 Smart Lifesciences Oligonucleotide Purification Media Product and Services

2.12.4 Smart Lifesciences Oligonucleotide Purification Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.12.5 Smart Lifesciences Recent Developments/Updates

3 COMPETITIVE ENVIRONMENT: OLIGONUCLEOTIDE PURIFICATION MEDIA BY MANUFACTURER

3.1 Global Oligonucleotide Purification Media Sales Quantity by Manufacturer (2021-2026)

3.2 Global Oligonucleotide Purification Media Revenue by Manufacturer (2021-2026)

3.3 Global Oligonucleotide Purification Media Average Price by Manufacturer (2021-2026)

3.4 Market Share Analysis (2025)

3.4.1 Producer Shipments of Oligonucleotide Purification Media by Manufacturer Revenue (\$MM) and Market Share (%): 2025

3.4.2 Top 3 Oligonucleotide Purification Media Manufacturer Market Share in 2025

3.4.3 Top 6 Oligonucleotide Purification Media Manufacturer Market Share in 2025

3.5 Oligonucleotide Purification Media Market: Overall Company Footprint Analysis

- 3.5.1 Oligonucleotide Purification Media Market: Region Footprint
- 3.5.2 Oligonucleotide Purification Media Market: Company Product Type Footprint
- 3.5.3 Oligonucleotide Purification Media Market: Company Product Application Footprint
- 3.6 New Market Entrants and Barriers to Market Entry
- 3.7 Mergers, Acquisition, Agreements, and Collaborations

4 CONSUMPTION ANALYSIS BY REGION

- 4.1 Global Oligonucleotide Purification Media Market Size by Region
 - 4.1.1 Global Oligonucleotide Purification Media Sales Quantity by Region (2021-2032)
 - 4.1.2 Global Oligonucleotide Purification Media Consumption Value by Region (2021-2032)
 - 4.1.3 Global Oligonucleotide Purification Media Average Price by Region (2021-2032)
- 4.2 North America Oligonucleotide Purification Media Consumption Value (2021-2032)
- 4.3 Europe Oligonucleotide Purification Media Consumption Value (2021-2032)
- 4.4 Asia-Pacific Oligonucleotide Purification Media Consumption Value (2021-2032)
- 4.5 South America Oligonucleotide Purification Media Consumption Value (2021-2032)
- 4.6 Middle East & Africa Oligonucleotide Purification Media Consumption Value (2021-2032)

5 MARKET SEGMENT BY TYPE

- 5.1 Global Oligonucleotide Purification Media Sales Quantity by Type (2021-2032)
- 5.2 Global Oligonucleotide Purification Media Consumption Value by Type (2021-2032)
- 5.3 Global Oligonucleotide Purification Media Average Price by Type (2021-2032)

6 MARKET SEGMENT BY APPLICATION

- 6.1 Global Oligonucleotide Purification Media Sales Quantity by Application (2021-2032)
- 6.2 Global Oligonucleotide Purification Media Consumption Value by Application (2021-2032)
- 6.3 Global Oligonucleotide Purification Media Average Price by Application (2021-2032)

7 NORTH AMERICA

- 7.1 North America Oligonucleotide Purification Media Sales Quantity by Type (2021-2032)
- 7.2 North America Oligonucleotide Purification Media Sales Quantity by Application

(2021-2032)

7.3 North America Oligonucleotide Purification Media Market Size by Country

7.3.1 North America Oligonucleotide Purification Media Sales Quantity by Country

(2021-2032)

7.3.2 North America Oligonucleotide Purification Media Consumption Value by Country

(2021-2032)

7.3.3 United States Market Size and Forecast (2021-2032)

7.3.4 Canada Market Size and Forecast (2021-2032)

7.3.5 Mexico Market Size and Forecast (2021-2032)

8 EUROPE

8.1 Europe Oligonucleotide Purification Media Sales Quantity by Type (2021-2032)

8.2 Europe Oligonucleotide Purification Media Sales Quantity by Application

(2021-2032)

8.3 Europe Oligonucleotide Purification Media Market Size by Country

8.3.1 Europe Oligonucleotide Purification Media Sales Quantity by Country

(2021-2032)

8.3.2 Europe Oligonucleotide Purification Media Consumption Value by Country

(2021-2032)

8.3.3 Germany Market Size and Forecast (2021-2032)

8.3.4 France Market Size and Forecast (2021-2032)

8.3.5 United Kingdom Market Size and Forecast (2021-2032)

8.3.6 Russia Market Size and Forecast (2021-2032)

8.3.7 Italy Market Size and Forecast (2021-2032)

9 ASIA-PACIFIC

9.1 Asia-Pacific Oligonucleotide Purification Media Sales Quantity by Type (2021-2032)

9.2 Asia-Pacific Oligonucleotide Purification Media Sales Quantity by Application

(2021-2032)

9.3 Asia-Pacific Oligonucleotide Purification Media Market Size by Region

9.3.1 Asia-Pacific Oligonucleotide Purification Media Sales Quantity by Region

(2021-2032)

9.3.2 Asia-Pacific Oligonucleotide Purification Media Consumption Value by Region

(2021-2032)

9.3.3 China Market Size and Forecast (2021-2032)

9.3.4 Japan Market Size and Forecast (2021-2032)

9.3.5 South Korea Market Size and Forecast (2021-2032)

- 9.3.6 India Market Size and Forecast (2021-2032)
- 9.3.7 Southeast Asia Market Size and Forecast (2021-2032)
- 9.3.8 Australia Market Size and Forecast (2021-2032)

10 SOUTH AMERICA

- 10.1 South America Oligonucleotide Purification Media Sales Quantity by Type (2021-2032)
- 10.2 South America Oligonucleotide Purification Media Sales Quantity by Application (2021-2032)
- 10.3 South America Oligonucleotide Purification Media Market Size by Country
 - 10.3.1 South America Oligonucleotide Purification Media Sales Quantity by Country (2021-2032)
 - 10.3.2 South America Oligonucleotide Purification Media Consumption Value by Country (2021-2032)
 - 10.3.3 Brazil Market Size and Forecast (2021-2032)
 - 10.3.4 Argentina Market Size and Forecast (2021-2032)

11 MIDDLE EAST & AFRICA

- 11.1 Middle East & Africa Oligonucleotide Purification Media Sales Quantity by Type (2021-2032)
- 11.2 Middle East & Africa Oligonucleotide Purification Media Sales Quantity by Application (2021-2032)
- 11.3 Middle East & Africa Oligonucleotide Purification Media Market Size by Country
 - 11.3.1 Middle East & Africa Oligonucleotide Purification Media Sales Quantity by Country (2021-2032)
 - 11.3.2 Middle East & Africa Oligonucleotide Purification Media Consumption Value by Country (2021-2032)
 - 11.3.3 Turkey Market Size and Forecast (2021-2032)
 - 11.3.4 Egypt Market Size and Forecast (2021-2032)
 - 11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)
 - 11.3.6 South Africa Market Size and Forecast (2021-2032)

12 MARKET DYNAMICS

- 12.1 Oligonucleotide Purification Media Market Drivers
- 12.2 Oligonucleotide Purification Media Market Restraints
- 12.3 Oligonucleotide Purification Media Trends Analysis

12.4 Porters Five Forces Analysis

12.4.1 Threat of New Entrants

12.4.2 Bargaining Power of Suppliers

12.4.3 Bargaining Power of Buyers

12.4.4 Threat of Substitutes

12.4.5 Competitive Rivalry

13 RAW MATERIAL AND INDUSTRY CHAIN

13.1 Raw Material of Oligonucleotide Purification Media and Key Manufacturers

13.2 Manufacturing Costs Percentage of Oligonucleotide Purification Media

13.3 Oligonucleotide Purification Media Production Process

13.4 Industry Value Chain Analysis

14 SHIPMENTS BY DISTRIBUTION CHANNEL

14.1 Sales Channel

14.1.1 Direct to End-User

14.1.2 Distributors

14.2 Oligonucleotide Purification Media Typical Distributors

14.3 Oligonucleotide Purification Media Typical Customers

15 RESEARCH FINDINGS AND CONCLUSION

16 APPENDIX

16.1 Methodology

16.2 Research Process and Data Source

16.3 Disclaimer

List Of Tables

LIST OF TABLES

- Table 1. Global Oligonucleotide Purification Media Consumption Value by Type, (USD Million), 2021 & 2025 & 2032
- Table 2. Global Oligonucleotide Purification Media Consumption Value by Base Matrix, (USD Million), 2021 & 2025 & 2032
- Table 3. Global Oligonucleotide Purification Media Consumption Value by Particle Size Range, (USD Million), 2021 & 2025 & 2032
- Table 4. Global Oligonucleotide Purification Media Consumption Value by Ligand and Surface Chemistry, (USD Million), 2021 & 2025 & 2032
- Table 5. Global Oligonucleotide Purification Media Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
- Table 6. Cytiva Basic Information, Manufacturing Base and Competitors
- Table 7. Cytiva Major Business
- Table 8. Cytiva Oligonucleotide Purification Media Product and Services
- Table 9. Cytiva Oligonucleotide Purification Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 10. Cytiva Recent Developments/Updates
- Table 11. DuPont Basic Information, Manufacturing Base and Competitors
- Table 12. DuPont Major Business
- Table 13. DuPont Oligonucleotide Purification Media Product and Services
- Table 14. DuPont Oligonucleotide Purification Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 15. DuPont Recent Developments/Updates
- Table 16. Bio-Rad Basic Information, Manufacturing Base and Competitors
- Table 17. Bio-Rad Major Business
- Table 18. Bio-Rad Oligonucleotide Purification Media Product and Services
- Table 19. Bio-Rad Oligonucleotide Purification Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 20. Bio-Rad Recent Developments/Updates
- Table 21. Bio-Works Basic Information, Manufacturing Base and Competitors
- Table 22. Bio-Works Major Business
- Table 23. Bio-Works Oligonucleotide Purification Media Product and Services
- Table 24. Bio-Works Oligonucleotide Purification Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 25. Bio-Works Recent Developments/Updates
- Table 26. YMC Basic Information, Manufacturing Base and Competitors

Table 27. YMC Major Business

Table 28. YMC Oligonucleotide Purification Media Product and Services

Table 29. YMC Oligonucleotide Purification Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 30. YMC Recent Developments/Updates

Table 31. Tosoh Bioscience Basic Information, Manufacturing Base and Competitors

Table 32. Tosoh Bioscience Major Business

Table 33. Tosoh Bioscience Oligonucleotide Purification Media Product and Services

Table 34. Tosoh Bioscience Oligonucleotide Purification Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 35. Tosoh Bioscience Recent Developments/Updates

Table 36. Agilent Basic Information, Manufacturing Base and Competitors

Table 37. Agilent Major Business

Table 38. Agilent Oligonucleotide Purification Media Product and Services

Table 39. Agilent Oligonucleotide Purification Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 40. Agilent Recent Developments/Updates

Table 41. Thermo Fisher Scientific Basic Information, Manufacturing Base and Competitors

Table 42. Thermo Fisher Scientific Major Business

Table 43. Thermo Fisher Scientific Oligonucleotide Purification Media Product and Services

Table 44. Thermo Fisher Scientific Oligonucleotide Purification Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 45. Thermo Fisher Scientific Recent Developments/Updates

Table 46. Waters Basic Information, Manufacturing Base and Competitors

Table 47. Waters Major Business

Table 48. Waters Oligonucleotide Purification Media Product and Services

Table 49. Waters Oligonucleotide Purification Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 50. Waters Recent Developments/Updates

Table 51. NanoMicro Basic Information, Manufacturing Base and Competitors

Table 52. NanoMicro Major Business

Table 53. NanoMicro Oligonucleotide Purification Media Product and Services

Table 54. NanoMicro Oligonucleotide Purification Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 55. NanoMicro Recent Developments/Updates

Table 56. Bestchrom Basic Information, Manufacturing Base and Competitors

Table 57. Bestchrom Major Business

Table 58. Bestchrom Oligonucleotide Purification Media Product and Services

Table 59. Bestchrom Oligonucleotide Purification Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 60. Bestchrom Recent Developments/Updates

Table 61. Smart Lifesciences Basic Information, Manufacturing Base and Competitors

Table 62. Smart Lifesciences Major Business

Table 63. Smart Lifesciences Oligonucleotide Purification Media Product and Services

Table 64. Smart Lifesciences Oligonucleotide Purification Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 65. Smart Lifesciences Recent Developments/Updates

Table 66. Global Oligonucleotide Purification Media Sales Quantity by Manufacturer (2021-2026) & (kg)

Table 67. Global Oligonucleotide Purification Media Revenue by Manufacturer (2021-2026) & (USD Million)

Table 68. Global Oligonucleotide Purification Media Average Price by Manufacturer (2021-2026) & (US\$/kg)

Table 69. Market Position of Manufacturers in Oligonucleotide Purification Media, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025

Table 70. Head Office and Oligonucleotide Purification Media Production Site of Key Manufacturer

Table 71. Oligonucleotide Purification Media Market: Company Product Type Footprint

Table 72. Oligonucleotide Purification Media Market: Company Product Application Footprint

Table 73. Oligonucleotide Purification Media New Market Entrants and Barriers to Market Entry

Table 74. Oligonucleotide Purification Media Mergers, Acquisition, Agreements, and Collaborations

Table 75. Global Oligonucleotide Purification Media Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR

Table 76. Global Oligonucleotide Purification Media Sales Quantity by Region (2021-2026) & (kg)

Table 77. Global Oligonucleotide Purification Media Sales Quantity by Region (2027-2032) & (kg)

Table 78. Global Oligonucleotide Purification Media Consumption Value by Region (2021-2026) & (USD Million)

Table 79. Global Oligonucleotide Purification Media Consumption Value by Region

(2027-2032) & (USD Million)

Table 80. Global Oligonucleotide Purification Media Average Price by Region
(2021-2026) & (US\$/kg)

Table 81. Global Oligonucleotide Purification Media Average Price by Region
(2027-2032) & (US\$/kg)

Table 82. Global Oligonucleotide Purification Media Sales Quantity by Type
(2021-2026) & (kg)

Table 83. Global Oligonucleotide Purification Media Sales Quantity by Type
(2027-2032) & (kg)

Table 84. Global Oligonucleotide Purification Media Consumption Value by Type
(2021-2026) & (USD Million)

Table 85. Global Oligonucleotide Purification Media Consumption Value by Type
(2027-2032) & (USD Million)

Table 86. Global Oligonucleotide Purification Media Average Price by Type (2021-2026)
& (US\$/kg)

Table 87. Global Oligonucleotide Purification Media Average Price by Type (2027-2032)
& (US\$/kg)

Table 88. Global Oligonucleotide Purification Media Sales Quantity by Application
(2021-2026) & (kg)

Table 89. Global Oligonucleotide Purification Media Sales Quantity by Application
(2027-2032) & (kg)

Table 90. Global Oligonucleotide Purification Media Consumption Value by Application
(2021-2026) & (USD Million)

Table 91. Global Oligonucleotide Purification Media Consumption Value by Application
(2027-2032) & (USD Million)

Table 92. Global Oligonucleotide Purification Media Average Price by Application
(2021-2026) & (US\$/kg)

Table 93. Global Oligonucleotide Purification Media Average Price by Application
(2027-2032) & (US\$/kg)

Table 94. North America Oligonucleotide Purification Media Sales Quantity by Type
(2021-2026) & (kg)

Table 95. North America Oligonucleotide Purification Media Sales Quantity by Type
(2027-2032) & (kg)

Table 96. North America Oligonucleotide Purification Media Sales Quantity by
Application (2021-2026) & (kg)

Table 97. North America Oligonucleotide Purification Media Sales Quantity by
Application (2027-2032) & (kg)

Table 98. North America Oligonucleotide Purification Media Sales Quantity by Country
(2021-2026) & (kg)

Table 99. North America Oligonucleotide Purification Media Sales Quantity by Country (2027-2032) & (kg)

Table 100. North America Oligonucleotide Purification Media Consumption Value by Country (2021-2026) & (USD Million)

Table 101. North America Oligonucleotide Purification Media Consumption Value by Country (2027-2032) & (USD Million)

Table 102. Europe Oligonucleotide Purification Media Sales Quantity by Type (2021-2026) & (kg)

Table 103. Europe Oligonucleotide Purification Media Sales Quantity by Type (2027-2032) & (kg)

Table 104. Europe Oligonucleotide Purification Media Sales Quantity by Application (2021-2026) & (kg)

Table 105. Europe Oligonucleotide Purification Media Sales Quantity by Application (2027-2032) & (kg)

Table 106. Europe Oligonucleotide Purification Media Sales Quantity by Country (2021-2026) & (kg)

Table 107. Europe Oligonucleotide Purification Media Sales Quantity by Country (2027-2032) & (kg)

Table 108. Europe Oligonucleotide Purification Media Consumption Value by Country (2021-2026) & (USD Million)

Table 109. Europe Oligonucleotide Purification Media Consumption Value by Country (2027-2032) & (USD Million)

Table 110. Asia-Pacific Oligonucleotide Purification Media Sales Quantity by Type (2021-2026) & (kg)

Table 111. Asia-Pacific Oligonucleotide Purification Media Sales Quantity by Type (2027-2032) & (kg)

Table 112. Asia-Pacific Oligonucleotide Purification Media Sales Quantity by Application (2021-2026) & (kg)

Table 113. Asia-Pacific Oligonucleotide Purification Media Sales Quantity by Application (2027-2032) & (kg)

Table 114. Asia-Pacific Oligonucleotide Purification Media Sales Quantity by Region (2021-2026) & (kg)

Table 115. Asia-Pacific Oligonucleotide Purification Media Sales Quantity by Region (2027-2032) & (kg)

Table 116. Asia-Pacific Oligonucleotide Purification Media Consumption Value by Region (2021-2026) & (USD Million)

Table 117. Asia-Pacific Oligonucleotide Purification Media Consumption Value by Region (2027-2032) & (USD Million)

Table 118. South America Oligonucleotide Purification Media Sales Quantity by Type

(2021-2026) & (kg)

Table 119. South America Oligonucleotide Purification Media Sales Quantity by Type (2027-2032) & (kg)

Table 120. South America Oligonucleotide Purification Media Sales Quantity by Application (2021-2026) & (kg)

Table 121. South America Oligonucleotide Purification Media Sales Quantity by Application (2027-2032) & (kg)

Table 122. South America Oligonucleotide Purification Media Sales Quantity by Country (2021-2026) & (kg)

Table 123. South America Oligonucleotide Purification Media Sales Quantity by Country (2027-2032) & (kg)

Table 124. South America Oligonucleotide Purification Media Consumption Value by Country (2021-2026) & (USD Million)

Table 125. South America Oligonucleotide Purification Media Consumption Value by Country (2027-2032) & (USD Million)

Table 126. Middle East & Africa Oligonucleotide Purification Media Sales Quantity by Type (2021-2026) & (kg)

Table 127. Middle East & Africa Oligonucleotide Purification Media Sales Quantity by Type (2027-2032) & (kg)

Table 128. Middle East & Africa Oligonucleotide Purification Media Sales Quantity by Application (2021-2026) & (kg)

Table 129. Middle East & Africa Oligonucleotide Purification Media Sales Quantity by Application (2027-2032) & (kg)

Table 130. Middle East & Africa Oligonucleotide Purification Media Sales Quantity by Country (2021-2026) & (kg)

Table 131. Middle East & Africa Oligonucleotide Purification Media Sales Quantity by Country (2027-2032) & (kg)

Table 132. Middle East & Africa Oligonucleotide Purification Media Consumption Value by Country (2021-2026) & (USD Million)

Table 133. Middle East & Africa Oligonucleotide Purification Media Consumption Value by Country (2027-2032) & (USD Million)

Table 134. Oligonucleotide Purification Media Raw Material

Table 135. Key Manufacturers of Oligonucleotide Purification Media Raw Materials

Table 136. Oligonucleotide Purification Media Typical Distributors

Table 137. Oligonucleotide Purification Media Typical Customers

List Of Figures

LIST OF FIGURES

Figure 1. Oligonucleotide Purification Media Picture

Figure 2. Global Oligonucleotide Purification Media Revenue by Type, (USD Million), 2021 & 2025 & 2032

Figure 3. Global Oligonucleotide Purification Media Revenue Market Share by Type in 2025

Figure 4. Strong Anion Exchange Media Examples

Figure 5. Weak Anion Exchange Media Examples

Figure 6. Reversed-Phase Media Examples

Figure 7. Hydrophobic Interaction Media Examples

Figure 8. Mixed-Mode Media Examples

Figure 9. Size Exclusion Media Examples

Figure 10. Global Oligonucleotide Purification Media Revenue by Base Matrix, (USD Million), 2021 & 2025 & 2032

Figure 11. Global Oligonucleotide Purification Media Revenue Market Share by Base Matrix in 2025

Figure 12. Agarose-Based Media Examples

Figure 13. Polymer-Based Media Examples

Figure 14. Silica and Hybrid Silica-Based Media Examples

Figure 15. Dextran-Based Media Examples

Figure 16. Other Base Matrix Media Examples

Figure 17. Global Oligonucleotide Purification Media Revenue by Particle Size Range, (USD Million), 2021 & 2025 & 2032

Figure 18. Global Oligonucleotide Purification Media Revenue Market Share by Particle Size Range in 2025

Figure 19. Sub-10 μ m Media Examples

Figure 20. 10-40 μ m Media Examples

Figure 21. 40-90 μ m Media Examples

Figure 22. Above 90 μ m Media Examples

Figure 23. Global Oligonucleotide Purification Media Revenue by Ligand and Surface Chemistry, (USD Million), 2021 & 2025 & 2032

Figure 24. Global Oligonucleotide Purification Media Revenue Market Share by Ligand and Surface Chemistry in 2025

Figure 25. Quaternary Amine Ligand Media Examples

Figure 26. Tertiary Amine and DEAE Ligand Media Examples

Figure 27. Hydrophobic Polymer Media Examples

Figure 28. C18 Bonded Media Examples

Figure 29. Multimodal Ligand Media Examples

Figure 30. Unfunctionalized Desalting Media Examples

Figure 31. Global Oligonucleotide Purification Media Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 32. Global Oligonucleotide Purification Media Revenue Market Share by Application in 2025

Figure 33. Therapeutic Oligonucleotide Manufacturing Examples

Figure 34. Diagnostic and Research Oligo Purification Examples

Figure 35. Process Development and Scale-Up Examples

Figure 36. Impurity Removal and Polishing Examples

Figure 37. Desalting and Buffer Exchange Examples

Figure 38. Quality Control and Analytical Fractionation Examples

Figure 39. Global Oligonucleotide Purification Media Consumption Value, (USD Million): 2021 & 2025 & 2032

Figure 40. Global Oligonucleotide Purification Media Consumption Value and Forecast (2021-2032) & (USD Million)

Figure 41. Global Oligonucleotide Purification Media Sales Quantity (2021-2032) & (kg)

Figure 42. Global Oligonucleotide Purification Media Price (2021-2032) & (US\$/kg)

Figure 43. Global Oligonucleotide Purification Media Sales Quantity Market Share by Manufacturer in 2025

Figure 44. Global Oligonucleotide Purification Media Revenue Market Share by Manufacturer in 2025

Figure 45. Producer Shipments of Oligonucleotide Purification Media by Manufacturer Sales (\$MM) and Market Share (%): 2025

Figure 46. Top 3 Oligonucleotide Purification Media Manufacturer (Revenue) Market Share in 2025

Figure 47. Top 6 Oligonucleotide Purification Media Manufacturer (Revenue) Market Share in 2025

Figure 48. Global Oligonucleotide Purification Media Sales Quantity Market Share by Region (2021-2032)

Figure 49. Global Oligonucleotide Purification Media Consumption Value Market Share by Region (2021-2032)

Figure 50. North America Oligonucleotide Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 51. Europe Oligonucleotide Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 52. Asia-Pacific Oligonucleotide Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 53. South America Oligonucleotide Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 54. Middle East & Africa Oligonucleotide Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 55. Global Oligonucleotide Purification Media Sales Quantity Market Share by Type (2021-2032)

Figure 56. Global Oligonucleotide Purification Media Consumption Value Market Share by Type (2021-2032)

Figure 57. Global Oligonucleotide Purification Media Average Price by Type (2021-2032) & (US\$/kg)

Figure 58. Global Oligonucleotide Purification Media Sales Quantity Market Share by Application (2021-2032)

Figure 59. Global Oligonucleotide Purification Media Revenue Market Share by Application (2021-2032)

Figure 60. Global Oligonucleotide Purification Media Average Price by Application (2021-2032) & (US\$/kg)

Figure 61. North America Oligonucleotide Purification Media Sales Quantity Market Share by Type (2021-2032)

Figure 62. North America Oligonucleotide Purification Media Sales Quantity Market Share by Application (2021-2032)

Figure 63. North America Oligonucleotide Purification Media Sales Quantity Market Share by Country (2021-2032)

Figure 64. North America Oligonucleotide Purification Media Consumption Value Market Share by Country (2021-2032)

Figure 65. United States Oligonucleotide Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 66. Canada Oligonucleotide Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 67. Mexico Oligonucleotide Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 68. Europe Oligonucleotide Purification Media Sales Quantity Market Share by Type (2021-2032)

Figure 69. Europe Oligonucleotide Purification Media Sales Quantity Market Share by Application (2021-2032)

Figure 70. Europe Oligonucleotide Purification Media Sales Quantity Market Share by Country (2021-2032)

Figure 71. Europe Oligonucleotide Purification Media Consumption Value Market Share by Country (2021-2032)

Figure 72. Germany Oligonucleotide Purification Media Consumption Value

(2021-2032) & (USD Million)

Figure 73. France Oligonucleotide Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 74. United Kingdom Oligonucleotide Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 75. Russia Oligonucleotide Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 76. Italy Oligonucleotide Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 77. Asia-Pacific Oligonucleotide Purification Media Sales Quantity Market Share by Type (2021-2032)

Figure 78. Asia-Pacific Oligonucleotide Purification Media Sales Quantity Market Share by Application (2021-2032)

Figure 79. Asia-Pacific Oligonucleotide Purification Media Sales Quantity Market Share by Region (2021-2032)

Figure 80. Asia-Pacific Oligonucleotide Purification Media Consumption Value Market Share by Region (2021-2032)

Figure 81. China Oligonucleotide Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 82. Japan Oligonucleotide Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 83. South Korea Oligonucleotide Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 84. India Oligonucleotide Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 85. Southeast Asia Oligonucleotide Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 86. Australia Oligonucleotide Purification Media Consumption Value (2021-2032) & (USD Million)

Figure 87. South America Oligonucleotide Purification Media Sales Quantity Market Share by Type (2021-2032)

Figure 88. South America Oligonucleotide Purification Media Sales Quantity Market Share by Application (2021-2032)

Figure 89. South America Oligonucleotide Purification Media Sales Quantity Market Share by Country (2021-2032)

Figure 90. South America Oligonucleotide Purification Media Consumption Value Market Share by Country (2021-2032)

Figure 91. Brazil Oligonucleotide Purification Media Consumption Value (2021-2032) & (USD Million)

- Figure 92. Argentina Oligonucleotide Purification Media Consumption Value (2021-2032) & (USD Million)
- Figure 93. Middle East & Africa Oligonucleotide Purification Media Sales Quantity Market Share by Type (2021-2032)
- Figure 94. Middle East & Africa Oligonucleotide Purification Media Sales Quantity Market Share by Application (2021-2032)
- Figure 95. Middle East & Africa Oligonucleotide Purification Media Sales Quantity Market Share by Country (2021-2032)
- Figure 96. Middle East & Africa Oligonucleotide Purification Media Consumption Value Market Share by Country (2021-2032)
- Figure 97. Turkey Oligonucleotide Purification Media Consumption Value (2021-2032) & (USD Million)
- Figure 98. Egypt Oligonucleotide Purification Media Consumption Value (2021-2032) & (USD Million)
- Figure 99. Saudi Arabia Oligonucleotide Purification Media Consumption Value (2021-2032) & (USD Million)
- Figure 100. South Africa Oligonucleotide Purification Media Consumption Value (2021-2032) & (USD Million)
- Figure 101. Oligonucleotide Purification Media Market Drivers
- Figure 102. Oligonucleotide Purification Media Market Restraints
- Figure 103. Oligonucleotide Purification Media Market Trends
- Figure 104. Porters Five Forces Analysis
- Figure 105. Manufacturing Cost Structure Analysis of Oligonucleotide Purification Media in 2025
- Figure 106. Manufacturing Process Analysis of Oligonucleotide Purification Media
- Figure 107. Oligonucleotide Purification Media Industrial Chain
- Figure 108. Sales Channel: Direct to End-User vs Distributors
- Figure 109. Direct Channel Pros & Cons
- Figure 110. Indirect Channel Pros & Cons
- Figure 111. Methodology
- Figure 112. Research Process and Data Source

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