

Enzymatic DNA Synthesis Market Size, Share & Trends Analysis Report By Services (Oligonucleotide Synthesis, Gene Synthesis), By Application (Synthetic Biology, Vaccine Development), By End Use, By Region, And Segment Forecasts, 2025 - 2033

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Abstracts

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Enzymatic DNA Synthesis Market Summary

The global enzymatic DNA synthesis market size was estimated at USD 292.9 million in 2024, is projected to reach USD 2,444.7 million by 2033, expanding at a CAGR of 26.65% from 2025 to 2033. Owing to advancements in technology, rising demand for precision medicine, increased research in synthetic biology, and greater funding for genetic research and biotechnology are anticipated to drive the growth of the enzymatic DNA synthesis market.

Automation Breakthrough Expands Scope of Enzymatic DNA Applications

Moreover, the expanding biopharmaceutical sector, with its focus on innovative drug development and genetic research, is further propelling the enzymatic DNA synthesis market over the forecast period. Enzymatic DNA synthesis continues to push the boundaries of molecular manufacturing, with recent breakthroughs demonstrating its potential beyond traditional biotechnology. A pioneering development featured in PNAS introduces the DNA-DISK platform, which integrates enzymatic single-nucleotide DNA synthesis and sequencing with digital microfluidics. This end-to-end, fully automated system encodes digital data into DNA strands using terminal deoxynucleotidyl transferase (TdT), offering a streamlined and scalable alternative to conventional

synthesis and sequencing workflows. By eliminating harsh chemicals and enabling synthesis in aqueous environments, this platform aligns with the global shift toward safer, faster, and more sustainable production methods.

The innovation lies in its ability to automate the entire DNA data storage cycle—from writing to reading—within a compact and digitally controlled setup. The system's enzymatic precision allows for single-base additions, essential for encoding data accurately. This development reinforces enzymatic DNA synthesis as a flexible tool that can support decentralized synthesis models, especially in domains that require high-throughput and precision, such as bioinformatics and digital archiving. Companies in the sector, including DNA Script, Molecular Assemblies, and Ansa Biotechnologies, are already pursuing similar technological directions to meet demand for advanced, application-specific synthesis platforms.

This advancement reflects the evolving scope and commercial potential of enzymatic synthesis technologies. As demand grows for miniaturized, sustainable, and automated systems capable of operating beyond genomic applications, innovations such as DNA-DISK signal a significant market opportunity. DNA-based data storage—valued for its density, longevity, and eco-efficiency—is gaining traction as a frontier technology. The ability to synthesize and process DNA sequences autonomously opens doors to new collaborations and market expansion, positioning enzymatic synthesis as a critical enabler of next-generation molecular solutions across synthetic biology, data science, and decentralized biomanufacturing.

Scalable DNA Innovation Reshaping the Future of Synthetic Biology

Enzymatic DNA synthesis (EDS) is rapidly emerging as a transformative alternative to traditional chemical methods, addressing long-standing limitations in length, fidelity, and environmental sustainability. While phosphoramidite chemistry has dominated DNA synthesis for decades, it struggles to efficiently produce sequences beyond 300 bases due to cumulative cycle inefficiencies and high error rates. In contrast, EDS uses terminal deoxynucleotidyl transferase (TdT) to add nucleotides under mild, aqueous conditions, enabling high-purity synthesis of longer DNA fragments. This leap in technical capability is crucial for supporting advanced applications in genomics, gene editing, synthetic biology, and mRNA-based drug development.

From a commercial standpoint, the shift toward EDS is unlocking new growth avenues across the life sciences sector. The ability to produce long, accurate, and sequence-diverse DNA constructs quickly and sustainably offers a competitive edge in high-

throughput R&D and decentralized biomanufacturing. Companies pioneering this shift are gaining strategic traction by offering benchtop instruments, on-demand synthesis services, and early-access programs tailored for use in therapeutics, vaccine development, and next-generation bioengineering. As industries prioritize faster iteration cycles, reduced reliance on outsourcing, and greener technologies, enzymatic DNA synthesis is redefining the competitive landscape, positioning itself as a cornerstone of the evolving synthetic biology ecosystem.

Global Enzymatic DNA Synthesis Market Report Segmentation

This report forecasts revenue growth at global, regional, and country levels and provides an analysis of the latest industry trends in each of the sub-segments from 2021 to 2033. For this study, Grand View Research has segmented the global enzymatic DNA synthesis market report based on services, application, end use, and region.

Services Outlook (Revenue, USD Million, 2021 - 2033)

Oligonucleotide Synthesis

Gene Synthesis

Application Outlook (Revenue, USD Million, 2021 - 2033)

Synthetic Biology

Genetic Engineering

Vaccine Development

Others

End Use Outlook (Revenue, USD Million, 2021 - 2033)

Biopharmaceutical Companies

Academic & Research Institutes

Contract Research Organizations

Regional Outlook (Revenue, USD Million, 2021 - 2033)

North America

U.S.

Canada

Europe

Germany

UK

France

Italy

Spain

Denmark

Sweden

Norway

Asia Pacific

China

Japan

India

South Korea

Australia

Latin America

Brazil

Chile

MEA

Saudi Arabia

UAE

Kuwait

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