

Global Chiral Biocatalysis Services Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Chiral Biocatalysis Services market size is predicted to grow from US\$ 771 million in 2025 to US\$ 1559 million in 2032; it is expected to grow at a CAGR of 10.5% from 2026 to 2032.

The chiral biocatalysis services market refers to a specialized CRO/CDMO segment focused on enantioselective transformations using enzymes or whole-cell systems, providing outsourced R&D and process development services for chiral molecule construction across pharmaceuticals, fine chemicals, agrochemicals, food, and selected materials applications. Core services include enzyme screening, directed evolution, enantioselectivity optimization (ee improvement), route design, and scale-up, with optional extension into biocatalysis-enabled custom manufacturing. It excludes enzyme product sales.

The industry nominal capacity, inferred from engineering team size and parallel project handling, is estimated at 2,000?2,500 concurrent projects, with engineering and process development contributing over 60% of total value, corresponding to an equivalent throughput of ~12,000?15,000 project units annually (API intermediate process development basis). Pricing is strongly tiered: USD 50k?200k per discovery project, USD 200k?1M for enzyme engineering, and USD 1M?5M for process development and scale-up, while commercial manufacturing (if included) follows CDMO pricing but only partially belongs to this market. Blended gross margins are approximately 45?55%, driven by high-value engineering services. Demand is dominated by pharmaceuticals (65%), followed by fine chemicals (20%) and agrochemicals (8%), with food and materials collectively below 7%. The value chain spans upstream enzyme libraries, protein engineering, and emerging AI-driven enzyme design, midstream service providers for screening and process development, and downstream integration with

API/CDMO manufacturing. The competitive landscape is characterized by a platform oligopoly + CDMO integration structure: pure-play biocatalysis leaders (e.g., Codexis, Enzymaster) control core enzyme engineering capabilities, while CDMOs (e.g., Lonza, Cambrex, WuXi) embed biocatalysis to capture downstream value. Structurally, the market is in the mid-growth penetration phase, driven by demand for high enantioselectivity, yield, and greener processes (ESG/regulatory pressure), with the key uncertainty being the pace and scope of substitution versus traditional chiral metal catalysis, where biocatalysis has already achieved structural displacement in reduction and transamination but remains complementary in complex C-C bond formation.

LPI (LP Information)' newest research report, the 'Chiral Biocatalysis Services Industry Forecast' looks at past sales and reviews total world Chiral Biocatalysis Services sales in 2025, providing a comprehensive analysis by region and market sector of projected Chiral Biocatalysis Services sales for 2026 through 2032. With Chiral Biocatalysis Services sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Chiral Biocatalysis Services industry.

This Insight Report provides a comprehensive analysis of the global Chiral Biocatalysis Services landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Chiral Biocatalysis Services portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Chiral Biocatalysis Services market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Chiral Biocatalysis Services and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Chiral Biocatalysis Services.

This report presents a comprehensive overview, market shares, and growth opportunities of Chiral Biocatalysis Services market by product type, application, key players and key regions and countries.

Segmentation by Type:

Oxidoreductases

Transferases

Hydrolases

Lyases

Isomerases

Whole-cell Systems

Segmentation by Stage:

Discovery

Engineering

Process Development

Scale-up

Commercial Manufacturing

Segmentation by Application:

Materials

Pharmaceuticals

Fine Chemicals

Agrochemicals

Food & Flavors

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

Codexis

Arzeda

Prozomix

Enzymaster

Almac Sciences

Johnson Matthey

Cambrex

Lonza

Evonik

BASF Enzymes

Novozymes

DSM-Firmenich

Bachem

WuXi STA

Asymchem

Porton Pharma

J&K Scientific

Zhejiang Huahai

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global Chiral Biocatalysis Services Market Size (2021-2032)
 - 2.1.2 Chiral Biocatalysis Services Market Size CAGR by Region (2021 VS 2025 VS 2032)
 - 2.1.3 World Current & Future Analysis for Chiral Biocatalysis Services by Country/Region (2021, 2025 & 2032)
- 2.2 Chiral Biocatalysis Services Segment by Type
 - 2.2.1 Oxidoreductases
 - 2.2.2 Transferases
 - 2.2.3 Hydrolases
 - 2.2.4 Lyases
 - 2.2.5 Isomerases
 - 2.2.6 Whole-cell Systems
 - 2.2.7 Chiral Biocatalysis Services Market Size by Type
 - 2.2.7.1 Chiral Biocatalysis Services Market Size CAGR by Type (2021 VS 2025 VS 2032)
 - 2.2.7.2 Global Chiral Biocatalysis Services Market Size Market Share by Type (2021-2026)
- 2.3 Chiral Biocatalysis Services Segment by Stage
 - 2.3.1 Discovery
 - 2.3.2 Engineering
 - 2.3.3 Process Development
 - 2.3.4 Scale-up
 - 2.3.5 Commercial Manufacturing

2.3.6 Chiral Biocatalysis Services Market Size by Stage

2.3.6.1 Chiral Biocatalysis Services Market Size CAGR by Stage (2021 VS 2025 VS 2032)

2.3.6.2 Global Chiral Biocatalysis Services Market Size Market Share by Stage (2021-2026)

2.4 Chiral Biocatalysis Services Segment by Application

2.4.1 Materials

2.4.2 Pharmaceuticals

2.4.3 Fine Chemicals

2.4.4 Agrochemicals

2.4.5 Food & Flavors

2.4.6 Others

2.4.7 Chiral Biocatalysis Services Market Size by Application

2.4.7.1 Chiral Biocatalysis Services Market Size CAGR by Application (2021 VS 2025 VS 2032)

2.4.7.2 Global Chiral Biocatalysis Services Market Size Market Share by Application (2021-2026)

3 CHIRAL BIOCATALYSIS SERVICES MARKET SIZE BY PLAYER

3.1 Chiral Biocatalysis Services Market Size Market Share by Player

3.1.1 Global Chiral Biocatalysis Services Revenue by Player (2021-2026)

3.1.2 Global Chiral Biocatalysis Services Revenue Market Share by Player (2021-2026)

3.2 Global Chiral Biocatalysis Services Key Players Head office and Products Offered

3.3 Market Concentration Rate Analysis

3.3.1 Competition Landscape Analysis

3.3.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.4 New Products and Potential Entrants

3.5 Mergers & Acquisitions, Expansion

4 CHIRAL BIOCATALYSIS SERVICES BY REGION

4.1 Chiral Biocatalysis Services Market Size by Region (2021-2026)

4.2 Global Chiral Biocatalysis Services Annual Revenue by Country/Region (2021-2026)

4.3 Americas Chiral Biocatalysis Services Market Size Growth (2021-2026)

4.4 APAC Chiral Biocatalysis Services Market Size Growth (2021-2026)

4.5 Europe Chiral Biocatalysis Services Market Size Growth (2021-2026)

4.6 Middle East & Africa Chiral Biocatalysis Services Market Size Growth (2021-2026)

5 AMERICAS

5.1 Americas Chiral Biocatalysis Services Market Size by Country (2021-2026)

5.2 Americas Chiral Biocatalysis Services Market Size by Type (2021-2026)

5.3 Americas Chiral Biocatalysis Services Market Size by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Chiral Biocatalysis Services Market Size by Region (2021-2026)

6.2 APAC Chiral Biocatalysis Services Market Size by Type (2021-2026)

6.3 APAC Chiral Biocatalysis Services Market Size by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

7 EUROPE

7.1 Europe Chiral Biocatalysis Services Market Size by Country (2021-2026)

7.2 Europe Chiral Biocatalysis Services Market Size by Type (2021-2026)

7.3 Europe Chiral Biocatalysis Services Market Size by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Chiral Biocatalysis Services by Region (2021-2026)

8.2 Middle East & Africa Chiral Biocatalysis Services Market Size by Type (2021-2026)

8.3 Middle East & Africa Chiral Biocatalysis Services Market Size by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 GLOBAL CHIRAL BIOCATALYSIS SERVICES MARKET FORECAST

10.1 Global Chiral Biocatalysis Services Forecast by Region (2027-2032)

10.1.1 Global Chiral Biocatalysis Services Forecast by Region (2027-2032)

10.1.2 Americas Chiral Biocatalysis Services Forecast

10.1.3 APAC Chiral Biocatalysis Services Forecast

10.1.4 Europe Chiral Biocatalysis Services Forecast

10.1.5 Middle East & Africa Chiral Biocatalysis Services Forecast

10.2 Americas Chiral Biocatalysis Services Forecast by Country (2027-2032)

10.2.1 United States Market Chiral Biocatalysis Services Forecast

10.2.2 Canada Market Chiral Biocatalysis Services Forecast

10.2.3 Mexico Market Chiral Biocatalysis Services Forecast

10.2.4 Brazil Market Chiral Biocatalysis Services Forecast

10.3 APAC Chiral Biocatalysis Services Forecast by Region (2027-2032)

10.3.1 China Chiral Biocatalysis Services Market Forecast

10.3.2 Japan Market Chiral Biocatalysis Services Forecast

10.3.3 Korea Market Chiral Biocatalysis Services Forecast

10.3.4 Southeast Asia Market Chiral Biocatalysis Services Forecast

10.3.5 India Market Chiral Biocatalysis Services Forecast

10.3.6 Australia Market Chiral Biocatalysis Services Forecast

10.4 Europe Chiral Biocatalysis Services Forecast by Country (2027-2032)

10.4.1 Germany Market Chiral Biocatalysis Services Forecast

10.4.2 France Market Chiral Biocatalysis Services Forecast

10.4.3 UK Market Chiral Biocatalysis Services Forecast

10.4.4 Italy Market Chiral Biocatalysis Services Forecast

- 10.4.5 Russia Market Chiral Biocatalysis Services Forecast
- 10.5 Middle East & Africa Chiral Biocatalysis Services Forecast by Region (2027-2032)
 - 10.5.1 Egypt Market Chiral Biocatalysis Services Forecast
 - 10.5.2 South Africa Market Chiral Biocatalysis Services Forecast
 - 10.5.3 Israel Market Chiral Biocatalysis Services Forecast
 - 10.5.4 Turkey Market Chiral Biocatalysis Services Forecast
- 10.6 Global Chiral Biocatalysis Services Forecast by Type (2027-2032)
- 10.7 Global Chiral Biocatalysis Services Forecast by Application (2027-2032)
 - 10.7.1 GCC Countries Market Chiral Biocatalysis Services Forecast

11 KEY PLAYERS ANALYSIS

- 11.1 Codexis
 - 11.1.1 Codexis Company Information
 - 11.1.2 Codexis Chiral Biocatalysis Services Product Offered
 - 11.1.3 Codexis Chiral Biocatalysis Services Revenue, Gross Margin and Market Share (2021-2026)
 - 11.1.4 Codexis Main Business Overview
 - 11.1.5 Codexis Latest Developments
- 11.2 Arzeda
 - 11.2.1 Arzeda Company Information
 - 11.2.2 Arzeda Chiral Biocatalysis Services Product Offered
 - 11.2.3 Arzeda Chiral Biocatalysis Services Revenue, Gross Margin and Market Share (2021-2026)
 - 11.2.4 Arzeda Main Business Overview
 - 11.2.5 Arzeda Latest Developments
- 11.3 Prozomix
 - 11.3.1 Prozomix Company Information
 - 11.3.2 Prozomix Chiral Biocatalysis Services Product Offered
 - 11.3.3 Prozomix Chiral Biocatalysis Services Revenue, Gross Margin and Market Share (2021-2026)
 - 11.3.4 Prozomix Main Business Overview
 - 11.3.5 Prozomix Latest Developments
- 11.4 Enzymaster
 - 11.4.1 Enzymaster Company Information
 - 11.4.2 Enzymaster Chiral Biocatalysis Services Product Offered
 - 11.4.3 Enzymaster Chiral Biocatalysis Services Revenue, Gross Margin and Market Share (2021-2026)
 - 11.4.4 Enzymaster Main Business Overview

- 11.4.5 Enzymaster Latest Developments
- 11.5 Almac Sciences
 - 11.5.1 Almac Sciences Company Information
 - 11.5.2 Almac Sciences Chiral Biocatalysis Services Product Offered
 - 11.5.3 Almac Sciences Chiral Biocatalysis Services Revenue, Gross Margin and Market Share (2021-2026)
 - 11.5.4 Almac Sciences Main Business Overview
 - 11.5.5 Almac Sciences Latest Developments
- 11.6 Johnson Matthey
 - 11.6.1 Johnson Matthey Company Information
 - 11.6.2 Johnson Matthey Chiral Biocatalysis Services Product Offered
 - 11.6.3 Johnson Matthey Chiral Biocatalysis Services Revenue, Gross Margin and Market Share (2021-2026)
 - 11.6.4 Johnson Matthey Main Business Overview
 - 11.6.5 Johnson Matthey Latest Developments
- 11.7 Cambrex
 - 11.7.1 Cambrex Company Information
 - 11.7.2 Cambrex Chiral Biocatalysis Services Product Offered
 - 11.7.3 Cambrex Chiral Biocatalysis Services Revenue, Gross Margin and Market Share (2021-2026)
 - 11.7.4 Cambrex Main Business Overview
 - 11.7.5 Cambrex Latest Developments
- 11.8 Lonza
 - 11.8.1 Lonza Company Information
 - 11.8.2 Lonza Chiral Biocatalysis Services Product Offered
 - 11.8.3 Lonza Chiral Biocatalysis Services Revenue, Gross Margin and Market Share (2021-2026)
 - 11.8.4 Lonza Main Business Overview
 - 11.8.5 Lonza Latest Developments
- 11.9 Evonik
 - 11.9.1 Evonik Company Information
 - 11.9.2 Evonik Chiral Biocatalysis Services Product Offered
 - 11.9.3 Evonik Chiral Biocatalysis Services Revenue, Gross Margin and Market Share (2021-2026)
 - 11.9.4 Evonik Main Business Overview
 - 11.9.5 Evonik Latest Developments
- 11.10 BASF Enzymes
 - 11.10.1 BASF Enzymes Company Information
 - 11.10.2 BASF Enzymes Chiral Biocatalysis Services Product Offered

11.10.3 BASF Enzymes Chiral Biocatalysis Services Revenue, Gross Margin and Market Share (2021-2026)

11.10.4 BASF Enzymes Main Business Overview

11.10.5 BASF Enzymes Latest Developments

11.11 Novozymes

11.11.1 Novozymes Company Information

11.11.2 Novozymes Chiral Biocatalysis Services Product Offered

11.11.3 Novozymes Chiral Biocatalysis Services Revenue, Gross Margin and Market Share (2021-2026)

11.11.4 Novozymes Main Business Overview

11.11.5 Novozymes Latest Developments

11.12 DSM-Firmenich

11.12.1 DSM-Firmenich Company Information

11.12.2 DSM-Firmenich Chiral Biocatalysis Services Product Offered

11.12.3 DSM-Firmenich Chiral Biocatalysis Services Revenue, Gross Margin and Market Share (2021-2026)

11.12.4 DSM-Firmenich Main Business Overview

11.12.5 DSM-Firmenich Latest Developments

11.13 Bachem

11.13.1 Bachem Company Information

11.13.2 Bachem Chiral Biocatalysis Services Product Offered

11.13.3 Bachem Chiral Biocatalysis Services Revenue, Gross Margin and Market Share (2021-2026)

11.13.4 Bachem Main Business Overview

11.13.5 Bachem Latest Developments

11.14 WuXi STA

11.14.1 WuXi STA Company Information

11.14.2 WuXi STA Chiral Biocatalysis Services Product Offered

11.14.3 WuXi STA Chiral Biocatalysis Services Revenue, Gross Margin and Market Share (2021-2026)

11.14.4 WuXi STA Main Business Overview

11.14.5 WuXi STA Latest Developments

11.15 Asymchem

11.15.1 Asymchem Company Information

11.15.2 Asymchem Chiral Biocatalysis Services Product Offered

11.15.3 Asymchem Chiral Biocatalysis Services Revenue, Gross Margin and Market Share (2021-2026)

11.15.4 Asymchem Main Business Overview

11.15.5 Asymchem Latest Developments

11.16 Porton Pharma

11.16.1 Porton Pharma Company Information

11.16.2 Porton Pharma Chiral Biocatalysis Services Product Offered

11.16.3 Porton Pharma Chiral Biocatalysis Services Revenue, Gross Margin and Market Share (2021-2026)

11.16.4 Porton Pharma Main Business Overview

11.16.5 Porton Pharma Latest Developments

11.17 J&K Scientific

11.17.1 J&K Scientific Company Information

11.17.2 J&K Scientific Chiral Biocatalysis Services Product Offered

11.17.3 J&K Scientific Chiral Biocatalysis Services Revenue, Gross Margin and Market Share (2021-2026)

11.17.4 J&K Scientific Main Business Overview

11.17.5 J&K Scientific Latest Developments

11.18 Zhejiang Huahai

11.18.1 Zhejiang Huahai Company Information

11.18.2 Zhejiang Huahai Chiral Biocatalysis Services Product Offered

11.18.3 Zhejiang Huahai Chiral Biocatalysis Services Revenue, Gross Margin and Market Share (2021-2026)

11.18.4 Zhejiang Huahai Main Business Overview

11.18.5 Zhejiang Huahai Latest Developments

12 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Chiral Biocatalysis Services Market Size CAGR by Region (2021 VS 2025 VS 2032) & (\$ millions)

Table 2. Chiral Biocatalysis Services Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Oxidoreductases

Table 4. Major Players of Transferases

Table 5. Major Players of Hydrolases

Table 6. Major Players of Lyases

Table 7. Major Players of Isomerases

Table 8. Major Players of Whole-cell Systems

Table 9. Chiral Biocatalysis Services Market Size CAGR by Type (2021 VS 2025 VS 2032) & (\$ millions)

Table 10. Global Chiral Biocatalysis Services Market Size by Type (2021-2026) & (\$ millions)

Table 11. Global Chiral Biocatalysis Services Market Size Market Share by Type (2021-2026)

Table 12. Major Players of Discovery

Table 13. Major Players of Engineering

Table 14. Major Players of Process Development

Table 15. Major Players of Scale-up

Table 16. Major Players of Commercial Manufacturing

Table 17. Chiral Biocatalysis Services Market Size CAGR by Stage (2021 VS 2025 VS 2032) & (\$ millions)

Table 18. Global Chiral Biocatalysis Services Market Size by Stage (2021-2026) & (\$ millions)

Table 19. Global Chiral Biocatalysis Services Market Size Market Share by Stage (2021-2026)

Table 20. Chiral Biocatalysis Services Market Size CAGR by Application (2021 VS 2025 VS 2032) & (\$ millions)

Table 21. Global Chiral Biocatalysis Services Market Size by Application (2021-2026) & (\$ millions)

Table 22. Global Chiral Biocatalysis Services Market Size Market Share by Application (2021-2026)

Table 23. Global Chiral Biocatalysis Services Revenue by Player (2021-2026) & (\$ millions)

Table 24. Global Chiral Biocatalysis Services Revenue Market Share by Player (2021-2026)

Table 25. Chiral Biocatalysis Services Key Players Head office and Products Offered

Table 26. Chiral Biocatalysis Services Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 27. New Products and Potential Entrants

Table 28. Mergers & Acquisitions, Expansion

Table 29. Global Chiral Biocatalysis Services Market Size by Region (2021-2026) & (\$ millions)

Table 30. Global Chiral Biocatalysis Services Market Size Market Share by Region (2021-2026)

Table 31. Global Chiral Biocatalysis Services Revenue by Country/Region (2021-2026) & (\$ millions)

Table 32. Global Chiral Biocatalysis Services Revenue Market Share by Country/Region (2021-2026)

Table 33. Americas Chiral Biocatalysis Services Market Size by Country (2021-2026) & (\$ millions)

Table 34. Americas Chiral Biocatalysis Services Market Size Market Share by Country (2021-2026)

Table 35. Americas Chiral Biocatalysis Services Market Size by Type (2021-2026) & (\$ millions)

Table 36. Americas Chiral Biocatalysis Services Market Size Market Share by Type (2021-2026)

Table 37. Americas Chiral Biocatalysis Services Market Size by Application (2021-2026) & (\$ millions)

Table 38. Americas Chiral Biocatalysis Services Market Size Market Share by Application (2021-2026)

Table 39. APAC Chiral Biocatalysis Services Market Size by Region (2021-2026) & (\$ millions)

Table 40. APAC Chiral Biocatalysis Services Market Size Market Share by Region (2021-2026)

Table 41. APAC Chiral Biocatalysis Services Market Size by Type (2021-2026) & (\$ millions)

Table 42. APAC Chiral Biocatalysis Services Market Size by Application (2021-2026) & (\$ millions)

Table 43. Europe Chiral Biocatalysis Services Market Size by Country (2021-2026) & (\$ millions)

Table 44. Europe Chiral Biocatalysis Services Market Size Market Share by Country (2021-2026)

Table 45. Europe Chiral Biocatalysis Services Market Size by Type (2021-2026) & (\$ millions)

Table 46. Europe Chiral Biocatalysis Services Market Size by Application (2021-2026) & (\$ millions)

Table 47. Middle East & Africa Chiral Biocatalysis Services Market Size by Region (2021-2026) & (\$ millions)

Table 48. Middle East & Africa Chiral Biocatalysis Services Market Size by Type (2021-2026) & (\$ millions)

Table 49. Middle East & Africa Chiral Biocatalysis Services Market Size by Application (2021-2026) & (\$ millions)

Table 50. Key Market Drivers & Growth Opportunities of Chiral Biocatalysis Services

Table 51. Key Market Challenges & Risks of Chiral Biocatalysis Services

Table 52. Key Industry Trends of Chiral Biocatalysis Services

Table 53. Global Chiral Biocatalysis Services Market Size Forecast by Region (2027-2032) & (\$ millions)

Table 54. Global Chiral Biocatalysis Services Market Size Market Share Forecast by Region (2027-2032)

Table 55. Global Chiral Biocatalysis Services Market Size Forecast by Type (2027-2032) & (\$ millions)

Table 56. Global Chiral Biocatalysis Services Market Size Forecast by Application (2027-2032) & (\$ millions)

Table 57. Codexis Details, Company Type, Chiral Biocatalysis Services Area Served and Its Competitors

Table 58. Codexis Chiral Biocatalysis Services Product Offered

Table 59. Codexis Chiral Biocatalysis Services Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 60. Codexis Main Business

Table 61. Codexis Latest Developments

Table 62. Arzeda Details, Company Type, Chiral Biocatalysis Services Area Served and Its Competitors

Table 63. Arzeda Chiral Biocatalysis Services Product Offered

Table 64. Arzeda Chiral Biocatalysis Services Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 65. Arzeda Main Business

Table 66. Arzeda Latest Developments

Table 67. Prozomix Details, Company Type, Chiral Biocatalysis Services Area Served and Its Competitors

Table 68. Prozomix Chiral Biocatalysis Services Product Offered

Table 69. Prozomix Chiral Biocatalysis Services Revenue (\$ million), Gross Margin and

Market Share (2021-2026)

Table 70. Prozomix Main Business

Table 71. Prozomix Latest Developments

Table 72. Enzymaster Details, Company Type, Chiral Biocatalysis Services Area Served and Its Competitors

Table 73. Enzymaster Chiral Biocatalysis Services Product Offered

Table 74. Enzymaster Chiral Biocatalysis Services Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 75. Enzymaster Main Business

Table 76. Enzymaster Latest Developments

Table 77. Almac Sciences Details, Company Type, Chiral Biocatalysis Services Area Served and Its Competitors

Table 78. Almac Sciences Chiral Biocatalysis Services Product Offered

Table 79. Almac Sciences Chiral Biocatalysis Services Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 80. Almac Sciences Main Business

Table 81. Almac Sciences Latest Developments

Table 82. Johnson Matthey Details, Company Type, Chiral Biocatalysis Services Area Served and Its Competitors

Table 83. Johnson Matthey Chiral Biocatalysis Services Product Offered

Table 84. Johnson Matthey Chiral Biocatalysis Services Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 85. Johnson Matthey Main Business

Table 86. Johnson Matthey Latest Developments

Table 87. Cambrex Details, Company Type, Chiral Biocatalysis Services Area Served and Its Competitors

Table 88. Cambrex Chiral Biocatalysis Services Product Offered

Table 89. Cambrex Chiral Biocatalysis Services Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 90. Cambrex Main Business

Table 91. Cambrex Latest Developments

Table 92. Lonza Details, Company Type, Chiral Biocatalysis Services Area Served and Its Competitors

Table 93. Lonza Chiral Biocatalysis Services Product Offered

Table 94. Lonza Chiral Biocatalysis Services Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 95. Lonza Main Business

Table 96. Lonza Latest Developments

Table 97. Evonik Details, Company Type, Chiral Biocatalysis Services Area Served and

Its Competitors

Table 98. Evonik Chiral Biocatalysis Services Product Offered

Table 99. Evonik Chiral Biocatalysis Services Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 100. Evonik Main Business

Table 101. Evonik Latest Developments

Table 102. BASF Enzymes Details, Company Type, Chiral Biocatalysis Services Area Served and Its Competitors

Table 103. BASF Enzymes Chiral Biocatalysis Services Product Offered

Table 104. BASF Enzymes Chiral Biocatalysis Services Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 105. BASF Enzymes Main Business

Table 106. BASF Enzymes Latest Developments

Table 107. Novozymes Details, Company Type, Chiral Biocatalysis Services Area Served and Its Competitors

Table 108. Novozymes Chiral Biocatalysis Services Product Offered

Table 109. Novozymes Chiral Biocatalysis Services Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 110. Novozymes Main Business

Table 111. Novozymes Latest Developments

Table 112. DSM-Firmenich Details, Company Type, Chiral Biocatalysis Services Area Served and Its Competitors

Table 113. DSM-Firmenich Chiral Biocatalysis Services Product Offered

Table 114. DSM-Firmenich Chiral Biocatalysis Services Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 115. DSM-Firmenich Main Business

Table 116. DSM-Firmenich Latest Developments

Table 117. Bachem Details, Company Type, Chiral Biocatalysis Services Area Served and Its Competitors

Table 118. Bachem Chiral Biocatalysis Services Product Offered

Table 119. Bachem Chiral Biocatalysis Services Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 120. Bachem Main Business

Table 121. Bachem Latest Developments

Table 122. WuXi STA Details, Company Type, Chiral Biocatalysis Services Area Served and Its Competitors

Table 123. WuXi STA Chiral Biocatalysis Services Product Offered

Table 124. WuXi STA Chiral Biocatalysis Services Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 125. WuXi STA Main Business

Table 126. WuXi STA Latest Developments

Table 127. Asymchem Details, Company Type, Chiral Biocatalysis Services Area Served and Its Competitors

Table 128. Asymchem Chiral Biocatalysis Services Product Offered

Table 129. Asymchem Chiral Biocatalysis Services Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 130. Asymchem Main Business

Table 131. Asymchem Latest Developments

Table 132. Porton Pharma Details, Company Type, Chiral Biocatalysis Services Area Served and Its Competitors

Table 133. Porton Pharma Chiral Biocatalysis Services Product Offered

Table 134. Porton Pharma Chiral Biocatalysis Services Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 135. Porton Pharma Main Business

Table 136. Porton Pharma Latest Developments

Table 137. J&K Scientific Details, Company Type, Chiral Biocatalysis Services Area Served and Its Competitors

Table 138. J&K Scientific Chiral Biocatalysis Services Product Offered

Table 139. J&K Scientific Chiral Biocatalysis Services Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 140. J&K Scientific Main Business

Table 141. J&K Scientific Latest Developments

Table 142. Zhejiang Huahai Details, Company Type, Chiral Biocatalysis Services Area Served and Its Competitors

Table 143. Zhejiang Huahai Chiral Biocatalysis Services Product Offered

Table 144. Zhejiang Huahai Chiral Biocatalysis Services Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 145. Zhejiang Huahai Main Business

Table 146. Zhejiang Huahai Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Chiral Biocatalysis Services Report Years Considered
- Figure 2. Research Objectives
- Figure 3. Research Methodology
- Figure 4. Research Process and Data Source
- Figure 5. Global Chiral Biocatalysis Services Market Size Growth Rate (2021-2032) (\$ millions)
- Figure 6. Chiral Biocatalysis Services Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 7. Chiral Biocatalysis Services Sales Market Share by Country/Region (2025)
- Figure 8. Chiral Biocatalysis Services Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 9. Global Chiral Biocatalysis Services Market Size Market Share by Type in 2025
- Figure 10. Global Chiral Biocatalysis Services Market Size Market Share by Stage in 2025
- Figure 11. Chiral Biocatalysis Services in Materials
- Figure 12. Global Chiral Biocatalysis Services Market: Materials (2021-2026) & (\$ millions)
- Figure 13. Chiral Biocatalysis Services in Pharmaceuticals
- Figure 14. Global Chiral Biocatalysis Services Market: Pharmaceuticals (2021-2026) & (\$ millions)
- Figure 15. Chiral Biocatalysis Services in Fine Chemicals
- Figure 16. Global Chiral Biocatalysis Services Market: Fine Chemicals (2021-2026) & (\$ millions)
- Figure 17. Chiral Biocatalysis Services in Agrochemicals
- Figure 18. Global Chiral Biocatalysis Services Market: Agrochemicals (2021-2026) & (\$ millions)
- Figure 19. Chiral Biocatalysis Services in Food & Flavors
- Figure 20. Global Chiral Biocatalysis Services Market: Food & Flavors (2021-2026) & (\$ millions)
- Figure 21. Chiral Biocatalysis Services in Others
- Figure 22. Global Chiral Biocatalysis Services Market: Others (2021-2026) & (\$ millions)
- Figure 23. Global Chiral Biocatalysis Services Market Size Market Share by Application in 2025
- Figure 24. Global Chiral Biocatalysis Services Revenue Market Share by Player in 2025
- Figure 25. Global Chiral Biocatalysis Services Market Size Market Share by Region

(2021-2026)

Figure 26. Americas Chiral Biocatalysis Services Market Size 2021-2026 (\$ millions)

Figure 27. APAC Chiral Biocatalysis Services Market Size 2021-2026 (\$ millions)

Figure 28. Europe Chiral Biocatalysis Services Market Size 2021-2026 (\$ millions)

Figure 29. Middle East & Africa Chiral Biocatalysis Services Market Size 2021-2026 (\$ millions)

Figure 30. Americas Chiral Biocatalysis Services Value Market Share by Country in 2025

Figure 31. United States Chiral Biocatalysis Services Market Size Growth 2021-2026 (\$ millions)

Figure 32. Canada Chiral Biocatalysis Services Market Size Growth 2021-2026 (\$ millions)

Figure 33. Mexico Chiral Biocatalysis Services Market Size Growth 2021-2026 (\$ millions)

Figure 34. Brazil Chiral Biocatalysis Services Market Size Growth 2021-2026 (\$ millions)

Figure 35. APAC Chiral Biocatalysis Services Market Size Market Share by Region in 2025

Figure 36. APAC Chiral Biocatalysis Services Market Size Market Share by Type (2021-2026)

Figure 37. APAC Chiral Biocatalysis Services Market Size Market Share by Application (2021-2026)

Figure 38. China Chiral Biocatalysis Services Market Size Growth 2021-2026 (\$ millions)

Figure 39. Japan Chiral Biocatalysis Services Market Size Growth 2021-2026 (\$ millions)

Figure 40. South Korea Chiral Biocatalysis Services Market Size Growth 2021-2026 (\$ millions)

Figure 41. Southeast Asia Chiral Biocatalysis Services Market Size Growth 2021-2026 (\$ millions)

Figure 42. India Chiral Biocatalysis Services Market Size Growth 2021-2026 (\$ millions)

Figure 43. Australia Chiral Biocatalysis Services Market Size Growth 2021-2026 (\$ millions)

Figure 44. Europe Chiral Biocatalysis Services Market Size Market Share by Country in 2025

Figure 45. Europe Chiral Biocatalysis Services Market Size Market Share by Type (2021-2026)

Figure 46. Europe Chiral Biocatalysis Services Market Size Market Share by Application (2021-2026)

Figure 47. Germany Chiral Biocatalysis Services Market Size Growth 2021-2026 (\$ millions)

Figure 48. France Chiral Biocatalysis Services Market Size Growth 2021-2026 (\$ millions)

Figure 49. UK Chiral Biocatalysis Services Market Size Growth 2021-2026 (\$ millions)

Figure 50. Italy Chiral Biocatalysis Services Market Size Growth 2021-2026 (\$ millions)

Figure 51. Russia Chiral Biocatalysis Services Market Size Growth 2021-2026 (\$ millions)

Figure 52. Middle East & Africa Chiral Biocatalysis Services Market Size Market Share by Region (2021-2026)

Figure 53. Middle East & Africa Chiral Biocatalysis Services Market Size Market Share by Type (2021-2026)

Figure 54. Middle East & Africa Chiral Biocatalysis Services Market Size Market Share by Application (2021-2026)

Figure 55. Egypt Chiral Biocatalysis Services Market Size Growth 2021-2026 (\$ millions)

Figure 56. South Africa Chiral Biocatalysis Services Market Size Growth 2021-2026 (\$ millions)

Figure 57. Israel Chiral Biocatalysis Services Market Size Growth 2021-2026 (\$ millions)

Figure 58. Turkey Chiral Biocatalysis Services Market Size Growth 2021-2026 (\$ millions)

Figure 59. GCC Countries Chiral Biocatalysis Services Market Size Growth 2021-2026 (\$ millions)

Figure 60. Americas Chiral Biocatalysis Services Market Size 2027-2032 (\$ millions)

Figure 61. APAC Chiral Biocatalysis Services Market Size 2027-2032 (\$ millions)

Figure 62. Europe Chiral Biocatalysis Services Market Size 2027-2032 (\$ millions)

Figure 63. Middle East & Africa Chiral Biocatalysis Services Market Size 2027-2032 (\$ millions)

Figure 64. United States Chiral Biocatalysis Services Market Size 2027-2032 (\$ millions)

Figure 65. Canada Chiral Biocatalysis Services Market Size 2027-2032 (\$ millions)

Figure 66. Mexico Chiral Biocatalysis Services Market Size 2027-2032 (\$ millions)

Figure 67. Brazil Chiral Biocatalysis Services Market Size 2027-2032 (\$ millions)

Figure 68. China Chiral Biocatalysis Services Market Size 2027-2032 (\$ millions)

Figure 69. Japan Chiral Biocatalysis Services Market Size 2027-2032 (\$ millions)

Figure 70. Korea Chiral Biocatalysis Services Market Size 2027-2032 (\$ millions)

Figure 71. Southeast Asia Chiral Biocatalysis Services Market Size 2027-2032 (\$ millions)

- Figure 72. India Chiral Biocatalysis Services Market Size 2027-2032 (\$ millions)
- Figure 73. Australia Chiral Biocatalysis Services Market Size 2027-2032 (\$ millions)
- Figure 74. Germany Chiral Biocatalysis Services Market Size 2027-2032 (\$ millions)
- Figure 75. France Chiral Biocatalysis Services Market Size 2027-2032 (\$ millions)
- Figure 76. UK Chiral Biocatalysis Services Market Size 2027-2032 (\$ millions)
- Figure 77. Italy Chiral Biocatalysis Services Market Size 2027-2032 (\$ millions)
- Figure 78. Russia Chiral Biocatalysis Services Market Size 2027-2032 (\$ millions)
- Figure 79. Egypt Chiral Biocatalysis Services Market Size 2027-2032 (\$ millions)
- Figure 80. South Africa Chiral Biocatalysis Services Market Size 2027-2032 (\$ millions)
- Figure 81. Israel Chiral Biocatalysis Services Market Size 2027-2032 (\$ millions)
- Figure 82. Turkey Chiral Biocatalysis Services Market Size 2027-2032 (\$ millions)
- Figure 83. Global Chiral Biocatalysis Services Market Size Market Share Forecast by Type (2027-2032)
- Figure 84. Global Chiral Biocatalysis Services Market Size Market Share Forecast by Application (2027-2032)
- Figure 85. GCC Countries Chiral Biocatalysis Services Market Size 2027-2032 (\$ millions)

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