

Global Circular RNA Synthesis Service Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Circular RNA Synthesis Service market size is predicted to grow from US\$ 45.00 million in 2025 to US\$ 239 million in 2032; it is expected to grow at a CAGR of 26.8% from 2026 to 2032.

Circular RNA synthesis services provide integrated technical support for the design, production, purification, and quality control of customized circular RNA molecules based on customer-defined or jointly optimized target sequences. The typical service workflow includes circular RNA sequence design, DNA template construction, in vitro transcription, RNA circularization, purification, analytical testing, and optional lipid nanoparticle formulation and clinical-grade manufacturing. Major circularization routes include PIE self-splicing, modified scarless PIE methods, and T4 RNA ligase-mediated enzymatic ligation. Deliverables include research-grade circular RNA samples, preclinical drug substance, process-development packages, and GMP clinical batches. Upstream inputs mainly include nucleotide triphosphates, modified nucleosides, DNA and plasmid templates, RNA polymerases, RNA ligases, ribozyme elements, nucleases, buffers, chromatography media, ultrafiltration consumables, single-use bioprocessing materials, analytical reagents, and lipid materials, while downstream customers primarily include RNA drug developers, vaccine companies, gene and cell therapy companies, pharmaceutical companies, universities, research institutions, and hospital research centers. The overall industry gross margin typically around 40%-60%.

The circular RNA synthesis services market is still dominated by research-grade and preclinical projects, although demand is shifting from basic sample preparation toward sequence optimization, circularization process development, impurity control, analytical method establishment, and clinical manufacturing. The early market was primarily served by life-science tools and gene-synthesis companies supplying microgram- to

milligram-scale customized samples. As circular RNA drugs, vaccines, and in vivo cell therapy programs advance, several integrated RNA service providers are developing gram-scale production, lipid nanoparticle formulation, and GMP-compliant manufacturing capabilities. Global supply is currently concentrated in China and the United States. Chinese providers have established broad capabilities in research services, sequence analysis, circularization process development, and integrated CRDMO support, while U.S.-based providers generally benefit from broader international customer coverage and established nucleic acid manufacturing infrastructure.

Future competition will shift from demonstrating basic circularization capability toward reliably delivering high-purity, translatable, low-immunogenicity products that meet regulatory requirements. Competitive differentiation will increasingly depend on scarless circularization, long-sequence compatibility, process robustness across different payloads, removal of double-stranded RNA and linear precursors, batch reproducibility, and biological potency testing. Research-grade projects will continue to account for a large number of orders, but most value growth is expected to come from preclinical process development, GMP manufacturing, analytical validation, and LNP formulation. Suppliers with integrated capabilities covering sequence design, template preparation, circularization, purification, analytics, and formulation will be better positioned to retain projects as they progress toward clinical development.

Market growth is being driven by the expanding development of circular RNA therapeutics, therapeutic vaccines, protein-expression therapies, in vivo CAR-T, and other gene and cell therapy applications. Compared with building an internal small-scale production platform, outsourcing to specialized providers gives developers access to validated circularization elements, process expertise, analytical methods, and scale-up equipment, helping reduce development risk and shorten timelines to animal studies and regulatory submissions. As projects move from discovery into preclinical and clinical stages, additional testing for purity, integrity, residual DNA, double-stranded RNA, endotoxin, sterility, and potency increases the value of individual service contracts. Continued interest from large pharmaceutical companies in next-generation RNA technologies may also support greater demand for platform collaboration and outsourced manufacturing.

The main barriers are the lack of harmonized technical standards and differences in how suppliers measure circularization rate, purity, integrity, and expression activity, which make direct service comparison difficult. Conventional PIE methods may introduce residual sequences, sequence restrictions, and unwanted by-products, while

ligase-based methods face challenges related to enzyme cost, terminal design, and scale-up. Circularization efficiency, purification recovery, and batch consistency for long RNA sequences still require improvement. Clinical-grade production also requires more stringent raw-material controls, validated analytical methods, and quality standards. In addition, the limited number of clinical-stage downstream programs results in low GMP capacity utilization, exposing suppliers to high capital requirements, uneven order flow, and project cancellation risks.

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

This Insight Report provides a comprehensive analysis of the global Circular RNA Synthesis Service 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 Circular RNA Synthesis Service portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Circular RNA Synthesis Service market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Circular RNA Synthesis Service 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 Circular RNA Synthesis Service.

This report presents a comprehensive overview, market shares, and growth opportunities of Circular RNA Synthesis Service market by product type, application, key players and key regions and countries.

Segmentation by Type:

Custom Synthesis

Process Development

Analytical and QC Services

Other

Segmentation by Circularization Method:

PIE Circularization

Enzymatic Ligation

Other

Segmentation by Product Format:

Naked circRNA

circRNA-LNP

Other

Segmentation by Application:

Pharmaceutical and Biotechnology Companies

CRO and CDMO Companies

Other

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.

GenScript Biotech Corporation

VectorBuilder

Guangzhou Geneseed Biotech

uBriGene Biosciences

Yaohai Bio-Pharma

Creative Biogene

Creative Biolabs

BOC Sciences

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