

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

<https://marketpublishers.com/r/GC75528AFB27EN.html>

Date: July 2026

Pages: 85

Price: US\$ 3,660.00 (Single User License)

ID: GC75528AFB27EN

Abstracts

The global Exogenous Circular RNA Synthesis Service market size is predicted to grow from US\$ 42.06 million in 2025 to US\$ 218 million in 2032; it is expected to grow at a CAGR of 26.2% from 2026 to 2032.

Exogenous circular RNA synthesis services refer to specialized technical services that produce artificial circular RNA outside living cells based on customer-provided or jointly optimized sequences. The workflow typically includes DNA template construction, in vitro transcription, precursor RNA circularization, purification, analytical testing, and optional lipid nanoparticle formulation and clinical-grade manufacturing. The delivered RNA has already formed a covalently closed circular structure before being introduced into cells, tissues, or living organisms. Major circularization routes include PIE self-splicing, modified scarless PIE methods, and T4 RNA ligase-mediated enzymatic ligation. Deliverables include research-grade circRNA samples, preclinical drug substance, formulated samples, process-development packages, and GMP-compliant 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. Downstream customers primarily include RNA drug developers, vaccine companies, gene and cell therapy companies, pharmaceutical companies, universities, research institutes, and hospital research centers. Pricing is generally determined by sequence length, delivery scale, circularization method, purity grade, analytical requirements, formulation needs, and quality-system requirements. Research-grade projects are usually priced by sequence and quantity, while clinical and industrial projects are priced through process-development and batch-manufacturing contracts. The industry's overall gross margin in 2025 is estimated at approximately 40%-60%.

The exogenous circular RNA synthesis services market is still dominated by research-grade and preclinical projects, although customer demand is expanding from basic circRNA sample preparation to sequence optimization, circularization screening, impurity removal, analytical method development, and delivery formulation. Early suppliers mainly delivered microgram- to milligram-scale research samples, while several integrated service providers have developed larger-scale production, LNP formulation, and clinical-grade quality systems. Global supply is concentrated mainly in China and the United States. Chinese providers have developed broad capabilities in circularization processes, research services, and integrated CRDMO support, while U.S.-based providers generally benefit from international customer coverage, standardized service models, and established nucleic acid development infrastructure. The market remains characterized by a limited supplier base, highly customized projects, and revenues concentrated in the development stage.

Future competition will shift from basic circularization capability toward high purity, scarless products, long-sequence compatibility, low immunogenicity, and reproducible scale-up. Conventional PIE methods have a relatively established application base but may face challenges involving junction scars, sequence restrictions, and by-product control. Modified scarless PIE and ligase-based approaches offer greater sequence flexibility but impose additional requirements on terminal structure, splint design, enzyme cost, and downstream purification. As customer programs enter clinical development, residual linear RNA, double-stranded RNA, truncated transcripts, free intron fragments, and residual DNA will become increasingly important quality attributes. Suppliers with proprietary analytical methods and biological potency testing capabilities will gain a stronger competitive position.

Market growth is being driven by expanding development activity in circular RNA therapeutics, therapeutic vaccines, protein-expression therapies, in vivo cell therapies, and gene-editing research. Compared with building internal in vitro transcription and circularization platforms, outsourcing gives developers access to validated templates, circularization elements, purification processes, and analytical systems, reducing development risk and shortening timelines to animal studies and regulatory submissions. As programs move from discovery to preclinical and clinical stages, additional testing for circularization efficiency, purity, integrity, residual DNA, double-stranded RNA, endotoxin, sterility, and potency expands the service scope and contract value. Providers offering integrated template production, circRNA drug substance, LNP formulation, and quality studies will be better positioned to secure long-term projects.

The main barriers are the lack of harmonized quality and regulatory standards and differences in how suppliers measure circularization efficiency, purity, integrity, and expression activity. A high apparent circularization rate does not necessarily indicate high functional purity, because mis-ligated products, uncircularized precursors, double-stranded RNA, and truncated transcripts may affect expression and immune responses. Long-sequence circularization efficiency, purification recovery, and batch consistency remain technical challenges. Clinical-grade production also involves significant costs related to high-grade raw materials, quality validation, facility maintenance, and regulatory documentation. Because the number of clinical-stage exogenous circRNA programs remains limited, GMP capacity utilization and order continuity also constrain the stability of supplier profitability.

LPI (LP Information)' newest research report, the 'Exogenous Circular RNA Synthesis Service Industry Forecast' looks at past sales and reviews total world Exogenous Circular RNA Synthesis Service sales in 2025, providing a comprehensive analysis by region and market sector of projected Exogenous Circular RNA Synthesis Service sales for 2026 through 2032. With Exogenous 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 Exogenous Circular RNA Synthesis Service industry.

This Insight Report provides a comprehensive analysis of the global Exogenous 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 Exogenous 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 Exogenous Circular RNA Synthesis Service market.

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

This report presents a comprehensive overview, market shares, and growth opportunities of Exogenous 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

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