

Global Gene Synthesis and Synthetic Biology Service Market Growth (Status and Outlook) 2026-2032

<https://marketpublishers.com/r/GDFF3B8879F8EN.html>

Date: October 2026

Pages: 134

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

ID: GDFF3B8879F8EN

Abstracts

The global Gene Synthesis and Synthetic Biology Service market size is predicted to grow from US\$ 3727 million in 2025 to US\$ 10209 million in 2032; it is expected to grow at a CAGR of 15.6% from 2026 to 2032.

Gene synthesis and synthetic biology services refer to professional research and development services that use artificial DNA design, chemical synthesis, molecular assembly, genome editing and cell engineering to construct genes, genetic circuits, engineered cells and production strains with specified biological functions. The service scope covers sequence design and codon optimization, oligonucleotide and gene-fragment synthesis, complete gene and long-DNA assembly, vector construction, mutation-library development, protein engineering, genome editing, cell-line engineering, metabolic-pathway construction, strain optimization, functional testing and process scale-up. Service outputs may take the form of synthetic DNA, sequence-verified plasmids, variant libraries, engineered cells, microbial strains, analytical reports or complete technology packages. This research focuses on commercial services supporting one or more stages of the design-build-test-learn cycle, ranging from standardized gene synthesis to integrated synthetic biology development. Major customers include pharmaceutical and biotechnology companies, vaccine and diagnostic developers, agricultural and food enterprises, industrial biotechnology companies, chemical and material manufacturers, energy and environmental organizations, and academic research institutions.

Key Findings

Gene synthesis remains the foundation of commercial service demand

Pharmaceutical biotechnology represents the most valuable downstream application

Long DNA and high-throughput libraries expand service complexity

Integrated DBTL delivery raises customer dependence and project value

Automation improves throughput while expert design remains essential

Market Trends

The Gene Synthesis and Synthetic Biology Services market is shifting from standardized DNA production toward integrated biological engineering. Customers increasingly require service providers to support sequence design, gene synthesis, vector construction, functional testing and iterative optimization within one coordinated workflow. Improvements in DNA synthesis accuracy, assembly technologies, automation and computational biology are enabling longer constructs, larger variant libraries and more complex genetic circuits. High-throughput oligonucleotide pools and gene libraries are becoming important tools for protein engineering, antibody discovery, regulatory-element screening and pathway optimization. At the same time, pharmaceutical, food, chemical and material companies are seeking engineered cells and strains rather than isolated DNA products. The long-term industry direction is toward automated biofoundries, data-driven design and recurring design-build-test-learn cycles that connect laboratory results with the next round of biological optimization.

Market Dynamics

Drivers

Market demand is driven by expanding research in biologic drugs, cell and gene therapies, mRNA technologies, molecular diagnostics, precision fermentation and industrial biotechnology. Gene synthesis allows customers to obtain designed DNA without relying on natural templates, shortening experimental preparation and enabling systematic sequence optimization. The increasing use of recombinant proteins, antibody libraries, genome editing and engineered microorganisms raises demand for custom genes, plasmids and variant libraries. Food, chemical and material companies are also exploring biological production routes to reduce dependence on petrochemical processes and scarce natural resources. Advances in laboratory automation, sequencing and computational design are improving project throughput and supporting

more complex synthetic biology programs.

Restraints

Market growth is constrained by synthesis difficulty, project failure risk, high costs for complex engineering and limited scalability between laboratory and industrial production. Sequences with extreme GC content, repetitive regions, stable secondary structures or host toxicity may require extensive redesign and longer delivery times. Constructing a functional gene or pathway does not guarantee stable expression, desired biological activity or commercially viable yield. Cell and strain engineering projects often require multiple design and testing rounds, increasing labor, equipment and consumable costs. Intellectual-property restrictions, biosafety controls and DNA screening requirements may also affect project acceptance and delivery. For industrial customers, the economics of fermentation feedstock, purification and scale-up can be more important than the initial gene design.

Opportunities

Growth opportunities are concentrated in long-DNA synthesis, high-throughput libraries, protein engineering, cell programming, precision fermentation and end-to-end strain development. Pharmaceutical customers require increasingly complex antibody, receptor and therapeutic-protein libraries, while cell and gene therapy developers need optimized vectors, templates and engineered cell systems. Food and nutrition companies provide opportunities for strains producing alternative proteins, enzymes, vitamins, flavors and functional ingredients. Chemical and material manufacturers need improved enzymes and microbial factories for specialty chemicals, polymers and bio-based intermediates. Providers with automated laboratories, computational design, multi-host engineering and pilot-scale fermentation capabilities can extend their role from DNA suppliers to long-term research and development partners.

Challenges

The industry faces long-term challenges in standardizing service quality, protecting intellectual property and demonstrating reproducible biological performance. Sequence accuracy can be verified directly, but the performance of engineered cells and pathways depends on host biology, culture conditions and interactions among multiple genetic elements. Results obtained at microscale may not remain stable during fermentation scale-up. Providers must manage confidential customer sequences, proprietary strains and sensitive biological data while maintaining secure global collaboration. Increasing

automation requires substantial capital investment and highly standardized laboratory operations. Competition from internal research teams and lower-cost standardized synthesis suppliers also pressures service providers to demonstrate faster cycles, higher success rates and measurable improvements in biological productivity.

Value Chain Analysis

The upstream portion of the Gene Synthesis and Synthetic Biology Services value chain includes nucleotide and reagent suppliers, synthesis instruments, laboratory automation equipment, sequencing platforms, bioinformatics software, biological databases, cloning vectors, enzymes, cell lines, microbial hosts and laboratory consumables.

Computational tools support sequence design, codon optimization, pathway modeling and experimental planning, while DNA synthesis and assembly technologies convert digital sequences into physical biological material. Major upstream costs include reagents, sequencing verification, automation equipment, skilled scientific labor, laboratory facilities and quality systems. Sequence complexity, construct length, throughput and the required quality grade directly affect project cost and delivery time.

Midstream service providers conduct sequence design, synthesis, assembly, cloning, library construction, genome editing, cell or strain development, functional testing and fermentation optimization. Value creation increases as providers move from delivering individual DNA constructs to solving biological performance problems. Downstream customers include pharmaceutical and biotechnology companies, vaccine and diagnostic developers, agricultural enterprises, food and nutrition companies, chemical and material manufacturers, energy and environmental organizations, and research institutions. Standardized short-gene synthesis faces relatively strong price competition, while long DNA, high-throughput libraries, expert protein engineering, integrated DBTL programs and engineered-strain delivery generate higher technical value and stronger customer relationships.

Segment Insights

By service type, gene synthesis and DNA assembly form the broadest foundation because they support nearly all downstream synthetic biology workflows. Cloning, plasmid construction and sequence verification are frequently bundled with synthesis services to provide experiment-ready materials. Gene libraries and protein-engineering services have higher project complexity and are widely used in antibody discovery, enzyme optimization and variant screening. Genome editing, cell engineering and strain development represent deeper service categories because providers must demonstrate

functional performance rather than sequence accuracy alone. End-to-end synthetic biology services combine design, construction, testing, learning and scale-up, creating stronger customer dependence but requiring broader technical infrastructure.

By DNA length, gene fragments and standard genes account for most routine orders, while long and ultra-long DNA projects provide greater technical differentiation. By throughput, low- and medium-throughput projects remain common in academic and early-stage pharmaceutical research, whereas high-throughput gene and oligonucleotide libraries are increasingly used in platform-based discovery. By DBTL coverage, single-stage services are easier to standardize, while integrated and full-cycle services have longer delivery periods and higher project values. Automated biofoundry services are most effective for repetitive construction and screening, but expert intervention remains necessary for difficult sequences, biological interpretation, host selection and process optimization.

Downstream Market Opportunities

Pharmaceuticals and biotechnology represent the most valuable application group because gene synthesis supports antibody drugs, recombinant proteins, vaccines, molecular diagnostics, gene therapies and engineered cell products. Agriculture and animal health create demand for trait-related genes, edited organisms, microbial products and animal vaccines. Food and nutrition companies use engineered microorganisms and enzymes to produce proteins, amino acids, vitamins, flavors, sweeteners and functional ingredients. Industrial biotechnology, chemical and material customers require enzyme engineering, pathway design and production-strain optimization. Energy and environmental applications include biofuels, carbon conversion, pollutant degradation and biological sensing. Academic institutions remain an important customer base for standardized genes, vectors, libraries and experimental constructs.

Report Scope

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

Biology Service industry.

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

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

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

Market Segmentation

Segmentation by Type:

Single-Gene Engineering Service (1 Gene)

Small-Scale Multi-Gene Engineering Service (2–5 Genes)

Metabolic Pathway Engineering Service (6–20 Genes)

Complex Pathway Engineering Service (21–50 Genes)

Genome-Scale Engineering Service (>50 Genes)

Segmentation by Sequence Optimization Depth:

Basic Sequence Optimization

Standard Sequence Optimization

Advanced Sequence Optimization

Multi-Objective Sequence Design

Segmentation by Level of Automation:

Manual Laboratory Services

Automation-Assisted Services

Integrated Automation Services

Biofoundry Services

Segmentation by Application:

Pharmaceutical Industry

Healthcare Industry

Agricultural Industry

Food Industry

Energy Industry

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.

Twist Bioscience

Thermo Fisher Scientific

Integrated DNA Technologies

Azenta Life Sciences

ATUM

Ginkgo Bioworks

OriGene Technologies

Eurofins Genomics

ProteoGenix

GeneCust

BaseClear

Kaneka Corporation

GenScript

Tsingke Biotechnology

Sangon Biotech

General Biol

FASMAC

Takara Bio

Synplogen

Hokkaido System Science

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 Gene Synthesis and Synthetic Biology Service Market Size (2021-2032)
- 2.1.2 Gene Synthesis and Synthetic Biology Service Market Size CAGR by Region (2021 VS 2025 VS 2032)
- 2.1.3 World Current & Future Analysis for Gene Synthesis and Synthetic Biology Service by Country/Region (2021, 2025 & 2032)

2.2 Gene Synthesis and Synthetic Biology Service Segment by Type

- 2.2.1 Single-Gene Engineering Service (1 Gene)
- 2.2.2 Small-Scale Multi-Gene Engineering Service (2–5 Genes)
- 2.2.3 Metabolic Pathway Engineering Service (6–20 Genes)
- 2.2.4 Complex Pathway Engineering Service (21–50 Genes)
- 2.2.5 Genome-Scale Engineering Service (>50 Genes)
- 2.2.6 Gene Synthesis and Synthetic Biology Service Market Size by Type
 - 2.2.6.1 Gene Synthesis and Synthetic Biology Service Market Size CAGR by Type (2021 VS 2025 VS 2032)
 - 2.2.6.2 Global Gene Synthesis and Synthetic Biology Service Market Size Market Share by Type (2021-2026)

2.3 Gene Synthesis and Synthetic Biology Service Segment by Sequence Optimization Depth

- 2.3.1 Basic Sequence Optimization
- 2.3.2 Standard Sequence Optimization
- 2.3.3 Advanced Sequence Optimization
- 2.3.4 Multi-Objective Sequence Design
- 2.3.5 Gene Synthesis and Synthetic Biology Service Market Size by Sequence

Optimization Depth

2.3.5.1 Gene Synthesis and Synthetic Biology Service Market Size CAGR by Sequence Optimization Depth (2021 VS 2025 VS 2032)

2.3.5.2 Global Gene Synthesis and Synthetic Biology Service Market Size Market Share by Sequence Optimization Depth (2021-2026)

2.4 Gene Synthesis and Synthetic Biology Service Segment by Level of Automation

2.4.1 Manual Laboratory Services

2.4.2 Automation-Assisted Services

2.4.3 Integrated Automation Services

2.4.4 Biofoundry Services

2.4.5 Gene Synthesis and Synthetic Biology Service Market Size by Level of Automation

2.4.5.1 Gene Synthesis and Synthetic Biology Service Market Size CAGR by Level of Automation (2021 VS 2025 VS 2032)

2.4.5.2 Global Gene Synthesis and Synthetic Biology Service Market Size Market Share by Level of Automation (2021-2026)

2.5 Gene Synthesis and Synthetic Biology Service Segment by Application

2.5.1 Pharmaceutical Industry

2.5.2 Healthcare Industry

2.5.3 Agricultural Industry

2.5.4 Food Industry

2.5.5 Energy Industry

2.5.6 Others

2.5.7 Gene Synthesis and Synthetic Biology Service Market Size by Application

2.5.7.1 Gene Synthesis and Synthetic Biology Service Market Size CAGR by Application (2021 VS 2025 VS 2032)

2.5.7.2 Global Gene Synthesis and Synthetic Biology Service Market Size Market Share by Application (2021-2026)

3 GENE SYNTHESIS AND SYNTHETIC BIOLOGY SERVICE MARKET SIZE BY PLAYER

3.1 Gene Synthesis and Synthetic Biology Service Market Size Market Share by Player

3.1.1 Global Gene Synthesis and Synthetic Biology Service Revenue by Player (2021-2026)

3.1.2 Global Gene Synthesis and Synthetic Biology Service Revenue Market Share by Player (2021-2026)

3.2 Global Gene Synthesis and Synthetic Biology Service 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 GENE SYNTHESIS AND SYNTHETIC BIOLOGY SERVICE BY REGION

4.1 Gene Synthesis and Synthetic Biology Service Market Size by Region (2021-2026)

4.2 Global Gene Synthesis and Synthetic Biology Service Annual Revenue by Country/Region (2021-2026)

4.3 Americas Gene Synthesis and Synthetic Biology Service Market Size Growth (2021-2026)

4.4 APAC Gene Synthesis and Synthetic Biology Service Market Size Growth (2021-2026)

4.5 Europe Gene Synthesis and Synthetic Biology Service Market Size Growth (2021-2026)

4.6 Middle East & Africa Gene Synthesis and Synthetic Biology Service Market Size Growth (2021-2026)

5 AMERICAS

5.1 Americas Gene Synthesis and Synthetic Biology Service Market Size by Country (2021-2026)

5.2 Americas Gene Synthesis and Synthetic Biology Service Market Size by Type (2021-2026)

5.3 Americas Gene Synthesis and Synthetic Biology Service Market Size by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Gene Synthesis and Synthetic Biology Service Market Size by Region (2021-2026)

6.2 APAC Gene Synthesis and Synthetic Biology Service Market Size by Type (2021-2026)

6.3 APAC Gene Synthesis and Synthetic Biology Service 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 Gene Synthesis and Synthetic Biology Service Market Size by Country (2021-2026)

7.2 Europe Gene Synthesis and Synthetic Biology Service Market Size by Type (2021-2026)

7.3 Europe Gene Synthesis and Synthetic Biology Service 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 Gene Synthesis and Synthetic Biology Service by Region (2021-2026)

8.2 Middle East & Africa Gene Synthesis and Synthetic Biology Service Market Size by Type (2021-2026)

8.3 Middle East & Africa Gene Synthesis and Synthetic Biology Service 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 GENE SYNTHESIS AND SYNTHETIC BIOLOGY SERVICE MARKET FORECAST

10.1 Global Gene Synthesis and Synthetic Biology Service Forecast by Region (2027-2032)

10.1.1 Global Gene Synthesis and Synthetic Biology Service Forecast by Region (2027-2032)

10.1.2 Americas Gene Synthesis and Synthetic Biology Service Forecast

10.1.3 APAC Gene Synthesis and Synthetic Biology Service Forecast

10.1.4 Europe Gene Synthesis and Synthetic Biology Service Forecast

10.1.5 Middle East & Africa Gene Synthesis and Synthetic Biology Service Forecast

10.2 Americas Gene Synthesis and Synthetic Biology Service Forecast by Country (2027-2032)

10.2.1 United States Market Gene Synthesis and Synthetic Biology Service Forecast

10.2.2 Canada Market Gene Synthesis and Synthetic Biology Service Forecast

10.2.3 Mexico Market Gene Synthesis and Synthetic Biology Service Forecast

10.2.4 Brazil Market Gene Synthesis and Synthetic Biology Service Forecast

10.3 APAC Gene Synthesis and Synthetic Biology Service Forecast by Region (2027-2032)

10.3.1 China Gene Synthesis and Synthetic Biology Service Market Forecast

10.3.2 Japan Market Gene Synthesis and Synthetic Biology Service Forecast

10.3.3 Korea Market Gene Synthesis and Synthetic Biology Service Forecast

10.3.4 Southeast Asia Market Gene Synthesis and Synthetic Biology Service Forecast

10.3.5 India Market Gene Synthesis and Synthetic Biology Service Forecast

10.3.6 Australia Market Gene Synthesis and Synthetic Biology Service Forecast

10.4 Europe Gene Synthesis and Synthetic Biology Service Forecast by Country (2027-2032)

10.4.1 Germany Market Gene Synthesis and Synthetic Biology Service Forecast

10.4.2 France Market Gene Synthesis and Synthetic Biology Service Forecast

10.4.3 UK Market Gene Synthesis and Synthetic Biology Service Forecast

10.4.4 Italy Market Gene Synthesis and Synthetic Biology Service Forecast

10.4.5 Russia Market Gene Synthesis and Synthetic Biology Service Forecast

10.5 Middle East & Africa Gene Synthesis and Synthetic Biology Service Forecast by Region (2027-2032)

10.5.1 Egypt Market Gene Synthesis and Synthetic Biology Service Forecast

- 10.5.2 South Africa Market Gene Synthesis and Synthetic Biology Service Forecast
- 10.5.3 Israel Market Gene Synthesis and Synthetic Biology Service Forecast
- 10.5.4 Turkey Market Gene Synthesis and Synthetic Biology Service Forecast
- 10.6 Global Gene Synthesis and Synthetic Biology Service Forecast by Type (2027-2032)
- 10.7 Global Gene Synthesis and Synthetic Biology Service Forecast by Application (2027-2032)
 - 10.7.1 GCC Countries Market Gene Synthesis and Synthetic Biology Service Forecast

11 KEY PLAYERS ANALYSIS

11.1 Twist Bioscience

- 11.1.1 Twist Bioscience Company Information
- 11.1.2 Twist Bioscience Gene Synthesis and Synthetic Biology Service Product Offered
- 11.1.3 Twist Bioscience Gene Synthesis and Synthetic Biology Service Revenue, Gross Margin and Market Share (2021-2026)
- 11.1.4 Twist Bioscience Main Business Overview
- 11.1.5 Twist Bioscience Latest Developments
- 11.2 Thermo Fisher Scientific
 - 11.2.1 Thermo Fisher Scientific Company Information
 - 11.2.2 Thermo Fisher Scientific Gene Synthesis and Synthetic Biology Service Product Offered
 - 11.2.3 Thermo Fisher Scientific Gene Synthesis and Synthetic Biology Service Revenue, Gross Margin and Market Share (2021-2026)
 - 11.2.4 Thermo Fisher Scientific Main Business Overview
 - 11.2.5 Thermo Fisher Scientific Latest Developments
- 11.3 Integrated DNA Technologies
 - 11.3.1 Integrated DNA Technologies Company Information
 - 11.3.2 Integrated DNA Technologies Gene Synthesis and Synthetic Biology Service Product Offered
 - 11.3.3 Integrated DNA Technologies Gene Synthesis and Synthetic Biology Service Revenue, Gross Margin and Market Share (2021-2026)
 - 11.3.4 Integrated DNA Technologies Main Business Overview
 - 11.3.5 Integrated DNA Technologies Latest Developments
- 11.4 Azenta Life Sciences
 - 11.4.1 Azenta Life Sciences Company Information
 - 11.4.2 Azenta Life Sciences Gene Synthesis and Synthetic Biology Service Product Offered

11.4.3 Azenta Life Sciences Gene Synthesis and Synthetic Biology Service Revenue, Gross Margin and Market Share (2021-2026)

11.4.4 Azenta Life Sciences Main Business Overview

11.4.5 Azenta Life Sciences Latest Developments

11.5 ATUM

11.5.1 ATUM Company Information

11.5.2 ATUM Gene Synthesis and Synthetic Biology Service Product Offered

11.5.3 ATUM Gene Synthesis and Synthetic Biology Service Revenue, Gross Margin and Market Share (2021-2026)

11.5.4 ATUM Main Business Overview

11.5.5 ATUM Latest Developments

11.6 Ginkgo Bioworks

11.6.1 Ginkgo Bioworks Company Information

11.6.2 Ginkgo Bioworks Gene Synthesis and Synthetic Biology Service Product Offered

11.6.3 Ginkgo Bioworks Gene Synthesis and Synthetic Biology Service Revenue, Gross Margin and Market Share (2021-2026)

11.6.4 Ginkgo Bioworks Main Business Overview

11.6.5 Ginkgo Bioworks Latest Developments

11.7 OriGene Technologies

11.7.1 OriGene Technologies Company Information

11.7.2 OriGene Technologies Gene Synthesis and Synthetic Biology Service Product Offered

11.7.3 OriGene Technologies Gene Synthesis and Synthetic Biology Service Revenue, Gross Margin and Market Share (2021-2026)

11.7.4 OriGene Technologies Main Business Overview

11.7.5 OriGene Technologies Latest Developments

11.8 Eurofins Genomics

11.8.1 Eurofins Genomics Company Information

11.8.2 Eurofins Genomics Gene Synthesis and Synthetic Biology Service Product Offered

11.8.3 Eurofins Genomics Gene Synthesis and Synthetic Biology Service Revenue, Gross Margin and Market Share (2021-2026)

11.8.4 Eurofins Genomics Main Business Overview

11.8.5 Eurofins Genomics Latest Developments

11.9 ProteoGenix

11.9.1 ProteoGenix Company Information

11.9.2 ProteoGenix Gene Synthesis and Synthetic Biology Service Product Offered

11.9.3 ProteoGenix Gene Synthesis and Synthetic Biology Service Revenue, Gross

Margin and Market Share (2021-2026)

11.9.4 ProteoGenix Main Business Overview

11.9.5 ProteoGenix Latest Developments

11.10 GeneCust

11.10.1 GeneCust Company Information

11.10.2 GeneCust Gene Synthesis and Synthetic Biology Service Product Offered

11.10.3 GeneCust Gene Synthesis and Synthetic Biology Service Revenue, Gross

Margin and Market Share (2021-2026)

11.10.4 GeneCust Main Business Overview

11.10.5 GeneCust Latest Developments

11.11 BaseClear

11.11.1 BaseClear Company Information

11.11.2 BaseClear Gene Synthesis and Synthetic Biology Service Product Offered

11.11.3 BaseClear Gene Synthesis and Synthetic Biology Service Revenue, Gross

Margin and Market Share (2021-2026)

11.11.4 BaseClear Main Business Overview

11.11.5 BaseClear Latest Developments

11.12 Kaneka Corporation

11.12.1 Kaneka Corporation Company Information

11.12.2 Kaneka Corporation Gene Synthesis and Synthetic Biology Service Product Offered

11.12.3 Kaneka Corporation Gene Synthesis and Synthetic Biology Service Revenue, Gross Margin and Market Share (2021-2026)

11.12.4 Kaneka Corporation Main Business Overview

11.12.5 Kaneka Corporation Latest Developments

11.13 GenScript

11.13.1 GenScript Company Information

11.13.2 GenScript Gene Synthesis and Synthetic Biology Service Product Offered

11.13.3 GenScript Gene Synthesis and Synthetic Biology Service Revenue, Gross

Margin and Market Share (2021-2026)

11.13.4 GenScript Main Business Overview

11.13.5 GenScript Latest Developments

11.14 Tsingke Biotechnology

11.14.1 Tsingke Biotechnology Company Information

11.14.2 Tsingke Biotechnology Gene Synthesis and Synthetic Biology Service Product Offered

11.14.3 Tsingke Biotechnology Gene Synthesis and Synthetic Biology Service Revenue, Gross Margin and Market Share (2021-2026)

11.14.4 Tsingke Biotechnology Main Business Overview

- 11.14.5 Tsingke Biotechnology Latest Developments
- 11.15 Sangon Biotech
 - 11.15.1 Sangon Biotech Company Information
 - 11.15.2 Sangon Biotech Gene Synthesis and Synthetic Biology Service Product Offered
 - 11.15.3 Sangon Biotech Gene Synthesis and Synthetic Biology Service Revenue, Gross Margin and Market Share (2021-2026)
 - 11.15.4 Sangon Biotech Main Business Overview
 - 11.15.5 Sangon Biotech Latest Developments
- 11.16 General Biol
 - 11.16.1 General Biol Company Information
 - 11.16.2 General Biol Gene Synthesis and Synthetic Biology Service Product Offered
 - 11.16.3 General Biol Gene Synthesis and Synthetic Biology Service Revenue, Gross Margin and Market Share (2021-2026)
 - 11.16.4 General Biol Main Business Overview
 - 11.16.5 General Biol Latest Developments
- 11.17 FASMAC
 - 11.17.1 FASMAC Company Information
 - 11.17.2 FASMAC Gene Synthesis and Synthetic Biology Service Product Offered
 - 11.17.3 FASMAC Gene Synthesis and Synthetic Biology Service Revenue, Gross Margin and Market Share (2021-2026)
 - 11.17.4 FASMAC Main Business Overview
 - 11.17.5 FASMAC Latest Developments
- 11.18 Takara Bio
 - 11.18.1 Takara Bio Company Information
 - 11.18.2 Takara Bio Gene Synthesis and Synthetic Biology Service Product Offered
 - 11.18.3 Takara Bio Gene Synthesis and Synthetic Biology Service Revenue, Gross Margin and Market Share (2021-2026)
 - 11.18.4 Takara Bio Main Business Overview
 - 11.18.5 Takara Bio Latest Developments
- 11.19 Synplogen
 - 11.19.1 Synplogen Company Information
 - 11.19.2 Synplogen Gene Synthesis and Synthetic Biology Service Product Offered
 - 11.19.3 Synplogen Gene Synthesis and Synthetic Biology Service Revenue, Gross Margin and Market Share (2021-2026)
 - 11.19.4 Synplogen Main Business Overview
 - 11.19.5 Synplogen Latest Developments
- 11.20 Hokkaido System Science
 - 11.20.1 Hokkaido System Science Company Information

11.20.2 Hokkaido System Science Gene Synthesis and Synthetic Biology Service
Product Offered

11.20.3 Hokkaido System Science Gene Synthesis and Synthetic Biology Service
Revenue, Gross Margin and Market Share (2021-2026)

11.20.4 Hokkaido System Science Main Business Overview

11.20.5 Hokkaido System Science Latest Developments

12 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Gene Synthesis and Synthetic Biology Service Market Size CAGR by Region (2021 VS 2025 VS 2032) & (\$ millions)

Table 2. Gene Synthesis and Synthetic Biology Service Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Single-Gene Engineering Service (1 Gene)

Table 4. Major Players of Small-Scale Multi-Gene Engineering Service (2–5 Genes)

Table 5. Major Players of Metabolic Pathway Engineering Service (6–20 Genes)

Table 6. Major Players of Complex Pathway Engineering Service (21–50 Genes)

Table 7. Major Players of Genome-Scale Engineering Service (>50 Genes)

Table 8. Gene Synthesis and Synthetic Biology Service Market Size CAGR by Type (2021 VS 2025 VS 2032) & (\$ millions)

Table 9. Global Gene Synthesis and Synthetic Biology Service Market Size by Type (2021-2026) & (\$ millions)

Table 10. Global Gene Synthesis and Synthetic Biology Service Market Size Market Share by Type (2021-2026)

Table 11. Major Players of Basic Sequence Optimization

Table 12. Major Players of Standard Sequence Optimization

Table 13. Major Players of Advanced Sequence Optimization

Table 14. Major Players of Multi-Objective Sequence Design

Table 15. Gene Synthesis and Synthetic Biology Service Market Size CAGR by Sequence Optimization Depth (2021 VS 2025 VS 2032) & (\$ millions)

Table 16. Global Gene Synthesis and Synthetic Biology Service Market Size by Sequence Optimization Depth (2021-2026) & (\$ millions)

Table 17. Global Gene Synthesis and Synthetic Biology Service Market Size Market Share by Sequence Optimization Depth (2021-2026)

Table 18. Major Players of Manual Laboratory Services

Table 19. Major Players of Automation-Assisted Services

Table 20. Major Players of Integrated Automation Services

Table 21. Major Players of Biofoundry Services

Table 22. Gene Synthesis and Synthetic Biology Service Market Size CAGR by Level of Automation (2021 VS 2025 VS 2032) & (\$ millions)

Table 23. Global Gene Synthesis and Synthetic Biology Service Market Size by Level of Automation (2021-2026) & (\$ millions)

Table 24. Global Gene Synthesis and Synthetic Biology Service Market Size Market Share by Level of Automation (2021-2026)

Table 25. Gene Synthesis and Synthetic Biology Service Market Size CAGR by Application (2021 VS 2025 VS 2032) & (\$ millions)

Table 26. Global Gene Synthesis and Synthetic Biology Service Market Size by Application (2021-2026) & (\$ millions)

Table 27. Global Gene Synthesis and Synthetic Biology Service Market Size Market Share by Application (2021-2026)

Table 28. Global Gene Synthesis and Synthetic Biology Service Revenue by Player (2021-2026) & (\$ millions)

Table 29. Global Gene Synthesis and Synthetic Biology Service Revenue Market Share by Player (2021-2026)

Table 30. Gene Synthesis and Synthetic Biology Service Key Players Head office and Products Offered

Table 31. Gene Synthesis and Synthetic Biology Service Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 32. New Products and Potential Entrants

Table 33. Mergers & Acquisitions, Expansion

Table 34. Global Gene Synthesis and Synthetic Biology Service Market Size by Region (2021-2026) & (\$ millions)

Table 35. Global Gene Synthesis and Synthetic Biology Service Market Size Market Share by Region (2021-2026)

Table 36. Global Gene Synthesis and Synthetic Biology Service Revenue by Country/Region (2021-2026) & (\$ millions)

Table 37. Global Gene Synthesis and Synthetic Biology Service Revenue Market Share by Country/Region (2021-2026)

Table 38. Americas Gene Synthesis and Synthetic Biology Service Market Size by Country (2021-2026) & (\$ millions)

Table 39. Americas Gene Synthesis and Synthetic Biology Service Market Size Market Share by Country (2021-2026)

Table 40. Americas Gene Synthesis and Synthetic Biology Service Market Size by Type (2021-2026) & (\$ millions)

Table 41. Americas Gene Synthesis and Synthetic Biology Service Market Size Market Share by Type (2021-2026)

Table 42. Americas Gene Synthesis and Synthetic Biology Service Market Size by Application (2021-2026) & (\$ millions)

Table 43. Americas Gene Synthesis and Synthetic Biology Service Market Size Market Share by Application (2021-2026)

Table 44. APAC Gene Synthesis and Synthetic Biology Service Market Size by Region (2021-2026) & (\$ millions)

Table 45. APAC Gene Synthesis and Synthetic Biology Service Market Size Market

Share by Region (2021-2026)

Table 46. APAC Gene Synthesis and Synthetic Biology Service Market Size by Type (2021-2026) & (\$ millions)

Table 47. APAC Gene Synthesis and Synthetic Biology Service Market Size by Application (2021-2026) & (\$ millions)

Table 48. Europe Gene Synthesis and Synthetic Biology Service Market Size by Country (2021-2026) & (\$ millions)

Table 49. Europe Gene Synthesis and Synthetic Biology Service Market Size Market Share by Country (2021-2026)

Table 50. Europe Gene Synthesis and Synthetic Biology Service Market Size by Type (2021-2026) & (\$ millions)

Table 51. Europe Gene Synthesis and Synthetic Biology Service Market Size by Application (2021-2026) & (\$ millions)

Table 52. Middle East & Africa Gene Synthesis and Synthetic Biology Service Market Size by Region (2021-2026) & (\$ millions)

Table 53. Middle East & Africa Gene Synthesis and Synthetic Biology Service Market Size by Type (2021-2026) & (\$ millions)

Table 54. Middle East & Africa Gene Synthesis and Synthetic Biology Service Market Size by Application (2021-2026) & (\$ millions)

Table 55. Key Market Drivers & Growth Opportunities of Gene Synthesis and Synthetic Biology Service

Table 56. Key Market Challenges & Risks of Gene Synthesis and Synthetic Biology Service

Table 57. Key Industry Trends of Gene Synthesis and Synthetic Biology Service

Table 58. Global Gene Synthesis and Synthetic Biology Service Market Size Forecast by Region (2027-2032) & (\$ millions)

Table 59. Global Gene Synthesis and Synthetic Biology Service Market Size Market Share Forecast by Region (2027-2032)

Table 60. Global Gene Synthesis and Synthetic Biology Service Market Size Forecast by Type (2027-2032) & (\$ millions)

Table 61. Global Gene Synthesis and Synthetic Biology Service Market Size Forecast by Application (2027-2032) & (\$ millions)

Table 62. Twist Bioscience Details, Company Type, Gene Synthesis and Synthetic Biology Service Area Served and Its Competitors

Table 63. Twist Bioscience Gene Synthesis and Synthetic Biology Service Product Offered

Table 64. Twist Bioscience Gene Synthesis and Synthetic Biology Service Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 65. Twist Bioscience Main Business

Table 66. Twist Bioscience Latest Developments

Table 67. Thermo Fisher Scientific Details, Company Type, Gene Synthesis and Synthetic Biology Service Area Served and Its Competitors

Table 68. Thermo Fisher Scientific Gene Synthesis and Synthetic Biology Service Product Offered

Table 69. Thermo Fisher Scientific Gene Synthesis and Synthetic Biology Service Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 70. Thermo Fisher Scientific Main Business

Table 71. Thermo Fisher Scientific Latest Developments

Table 72. Integrated DNA Technologies Details, Company Type, Gene Synthesis and Synthetic Biology Service Area Served and Its Competitors

Table 73. Integrated DNA Technologies Gene Synthesis and Synthetic Biology Service Product Offered

Table 74. Integrated DNA Technologies Gene Synthesis and Synthetic Biology Service Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 75. Integrated DNA Technologies Main Business

Table 76. Integrated DNA Technologies Latest Developments

Table 77. Azenta Life Sciences Details, Company Type, Gene Synthesis and Synthetic Biology Service Area Served and Its Competitors

Table 78. Azenta Life Sciences Gene Synthesis and Synthetic Biology Service Product Offered

Table 79. Azenta Life Sciences Gene Synthesis and Synthetic Biology Service Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 80. Azenta Life Sciences Main Business

Table 81. Azenta Life Sciences Latest Developments

Table 82. ATUM Details, Company Type, Gene Synthesis and Synthetic Biology Service Area Served and Its Competitors

Table 83. ATUM Gene Synthesis and Synthetic Biology Service Product Offered

Table 84. ATUM Gene Synthesis and Synthetic Biology Service Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 85. ATUM Main Business

Table 86. ATUM Latest Developments

Table 87. Ginkgo Bioworks Details, Company Type, Gene Synthesis and Synthetic Biology Service Area Served and Its Competitors

Table 88. Ginkgo Bioworks Gene Synthesis and Synthetic Biology Service Product Offered

Table 89. Ginkgo Bioworks Gene Synthesis and Synthetic Biology Service Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 90. Ginkgo Bioworks Main Business

Table 91. Ginkgo Bioworks Latest Developments

Table 92. OriGene Technologies Details, Company Type, Gene Synthesis and Synthetic Biology Service Area Served and Its Competitors

Table 93. OriGene Technologies Gene Synthesis and Synthetic Biology Service Product Offered

Table 94. OriGene Technologies Gene Synthesis and Synthetic Biology Service Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 95. OriGene Technologies Main Business

Table 96. OriGene Technologies Latest Developments

Table 97. Eurofins Genomics Details, Company Type, Gene Synthesis and Synthetic Biology Service Area Served and Its Competitors

Table 98. Eurofins Genomics Gene Synthesis and Synthetic Biology Service Product Offered

Table 99. Eurofins Genomics Gene Synthesis and Synthetic Biology Service Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 100. Eurofins Genomics Main Business

Table 101. Eurofins Genomics Latest Developments

Table 102. ProteoGenix Details, Company Type, Gene Synthesis and Synthetic Biology Service Area Served and Its Competitors

Table 103. ProteoGenix Gene Synthesis and Synthetic Biology Service Product Offered

Table 104. ProteoGenix Gene Synthesis and Synthetic Biology Service Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 105. ProteoGenix Main Business

Table 106. ProteoGenix Latest Developments

Table 107. GeneCust Details, Company Type, Gene Synthesis and Synthetic Biology Service Area Served and Its Competitors

Table 108. GeneCust Gene Synthesis and Synthetic Biology Service Product Offered

Table 109. GeneCust Gene Synthesis and Synthetic Biology Service Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 110. GeneCust Main Business

Table 111. GeneCust Latest Developments

Table 112. BaseClear Details, Company Type, Gene Synthesis and Synthetic Biology Service Area Served and Its Competitors

Table 113. BaseClear Gene Synthesis and Synthetic Biology Service Product Offered

Table 114. BaseClear Gene Synthesis and Synthetic Biology Service Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 115. BaseClear Main Business

Table 116. BaseClear Latest Developments

Table 117. Kaneka Corporation Details, Company Type, Gene Synthesis and Synthetic

Biology Service Area Served and Its Competitors

Table 118. Kaneka Corporation Gene Synthesis and Synthetic Biology Service Product Offered

Table 119. Kaneka Corporation Gene Synthesis and Synthetic Biology Service Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 120. Kaneka Corporation Main Business

Table 121. Kaneka Corporation Latest Developments

Table 122. GenScript Details, Company Type, Gene Synthesis and Synthetic Biology Service Area Served and Its Competitors

Table 123. GenScript Gene Synthesis and Synthetic Biology Service Product Offered

Table 124. GenScript Gene Synthesis and Synthetic Biology Service Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 125. GenScript Main Business

Table 126. GenScript Latest Developments

Table 127. Tsingke Biotechnology Details, Company Type, Gene Synthesis and Synthetic Biology Service Area Served and Its Competitors

Table 128. Tsingke Biotechnology Gene Synthesis and Synthetic Biology Service Product Offered

Table 129. Tsingke Biotechnology Gene Synthesis and Synthetic Biology Service Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 130. Tsingke Biotechnology Main Business

Table 131. Tsingke Biotechnology Latest Developments

Table 132. Sangon Biotech Details, Company Type, Gene Synthesis and Synthetic Biology Service Area Served and Its Competitors

Table 133. Sangon Biotech Gene Synthesis and Synthetic Biology Service Product Offered

Table 134. Sangon Biotech Gene Synthesis and Synthetic Biology Service Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 135. Sangon Biotech Main Business

Table 136. Sangon Biotech Latest Developments

Table 137. General Biol Details, Company Type, Gene Synthesis and Synthetic Biology Service Area Served and Its Competitors

Table 138. General Biol Gene Synthesis and Synthetic Biology Service Product Offered

Table 139. General Biol Gene Synthesis and Synthetic Biology Service Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 140. General Biol Main Business

Table 141. General Biol Latest Developments

Table 142. FASMAC Details, Company Type, Gene Synthesis and Synthetic Biology Service Area Served and Its Competitors

Table 143. FASMAC Gene Synthesis and Synthetic Biology Service Product Offered

Table 144. FASMAC Gene Synthesis and Synthetic Biology Service Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 145. FASMAC Main Business

Table 146. FASMAC Latest Developments

Table 147. Takara Bio Details, Company Type, Gene Synthesis and Synthetic Biology Service Area Served and Its Competitors

Table 148. Takara Bio Gene Synthesis and Synthetic Biology Service Product Offered

Table 149. Takara Bio Gene Synthesis and Synthetic Biology Service Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 150. Takara Bio Main Business

Table 151. Takara Bio Latest Developments

Table 152. Synplogen Details, Company Type, Gene Synthesis and Synthetic Biology Service Area Served and Its Competitors

Table 153. Synplogen Gene Synthesis and Synthetic Biology Service Product Offered

Table 154. Synplogen Gene Synthesis and Synthetic Biology Service Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 155. Synplogen Main Business

Table 156. Synplogen Latest Developments

Table 157. Hokkaido System Science Details, Company Type, Gene Synthesis and Synthetic Biology Service Area Served and Its Competitors

Table 158. Hokkaido System Science Gene Synthesis and Synthetic Biology Service Product Offered

Table 159. Hokkaido System Science Gene Synthesis and Synthetic Biology Service Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 160. Hokkaido System Science Main Business

Table 161. Hokkaido System Science Latest Developments

List Of Figures

LIST OF FIGURES

Figure 1. Gene Synthesis and Synthetic Biology Service Report Years Considered

Figure 2. Research Objectives

Figure 3. Research Methodology

Figure 4. Research Process and Data Source

Figure 5. Global Gene Synthesis and Synthetic Biology Service Market Size Growth Rate (2021-2032) (\$ millions)

Figure 6. Gene Synthesis and Synthetic Biology Service Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Figure 7. Gene Synthesis and Synthetic Biology Service Sales Market Share by Country/Region (2025)

Figure 8. Gene Synthesis and Synthetic Biology Service Sales Market Share by Country/Region (2021, 2025 & 2032)

Figure 9. Global Gene Synthesis and Synthetic Biology Service Market Size Market Share by Type in 2025

Figure 10. Global Gene Synthesis and Synthetic Biology Service Market Size Market Share by Sequence Optimization Depth in 2025

Figure 11. Global Gene Synthesis and Synthetic Biology Service Market Size Market Share by Level of Automation in 2025

Figure 12. Gene Synthesis and Synthetic Biology Service in Pharmaceutical Industry

Figure 13. Global Gene Synthesis and Synthetic Biology Service Market: Pharmaceutical Industry (2021-2026) & (\$ millions)

Figure 14. Gene Synthesis and Synthetic Biology Service in Healthcare Industry

Figure 15. Global Gene Synthesis and Synthetic Biology Service Market: Healthcare Industry (2021-2026) & (\$ millions)

Figure 16. Gene Synthesis and Synthetic Biology Service in Agricultural Industry

Figure 17. Global Gene Synthesis and Synthetic Biology Service Market: Agricultural Industry (2021-2026) & (\$ millions)

Figure 18. Gene Synthesis and Synthetic Biology Service in Food Industry

Figure 19. Global Gene Synthesis and Synthetic Biology Service Market: Food Industry (2021-2026) & (\$ millions)

Figure 20. Gene Synthesis and Synthetic Biology Service in Energy Industry

Figure 21. Global Gene Synthesis and Synthetic Biology Service Market: Energy Industry (2021-2026) & (\$ millions)

Figure 22. Gene Synthesis and Synthetic Biology Service in Others

Figure 23. Global Gene Synthesis and Synthetic Biology Service Market: Others

(2021-2026) & (\$ millions)

Figure 24. Global Gene Synthesis and Synthetic Biology Service Market Size Market Share by Application in 2025

Figure 25. Global Gene Synthesis and Synthetic Biology Service Revenue Market Share by Player in 2025

Figure 26. Global Gene Synthesis and Synthetic Biology Service Market Size Market Share by Region (2021-2026)

Figure 27. Americas Gene Synthesis and Synthetic Biology Service Market Size 2021-2026 (\$ millions)

Figure 28. APAC Gene Synthesis and Synthetic Biology Service Market Size 2021-2026 (\$ millions)

Figure 29. Europe Gene Synthesis and Synthetic Biology Service Market Size 2021-2026 (\$ millions)

Figure 30. Middle East & Africa Gene Synthesis and Synthetic Biology Service Market Size 2021-2026 (\$ millions)

Figure 31. Americas Gene Synthesis and Synthetic Biology Service Value Market Share by Country in 2025

Figure 32. United States Gene Synthesis and Synthetic Biology Service Market Size Growth 2021-2026 (\$ millions)

Figure 33. Canada Gene Synthesis and Synthetic Biology Service Market Size Growth 2021-2026 (\$ millions)

Figure 34. Mexico Gene Synthesis and Synthetic Biology Service Market Size Growth 2021-2026 (\$ millions)

Figure 35. Brazil Gene Synthesis and Synthetic Biology Service Market Size Growth 2021-2026 (\$ millions)

Figure 36. APAC Gene Synthesis and Synthetic Biology Service Market Size Market Share by Region in 2025

Figure 37. APAC Gene Synthesis and Synthetic Biology Service Market Size Market Share by Type (2021-2026)

Figure 38. APAC Gene Synthesis and Synthetic Biology Service Market Size Market Share by Application (2021-2026)

Figure 39. China Gene Synthesis and Synthetic Biology Service Market Size Growth 2021-2026 (\$ millions)

Figure 40. Japan Gene Synthesis and Synthetic Biology Service Market Size Growth 2021-2026 (\$ millions)

Figure 41. South Korea Gene Synthesis and Synthetic Biology Service Market Size Growth 2021-2026 (\$ millions)

Figure 42. Southeast Asia Gene Synthesis and Synthetic Biology Service Market Size Growth 2021-2026 (\$ millions)

Figure 43. India Gene Synthesis and Synthetic Biology Service Market Size Growth 2021-2026 (\$ millions)

Figure 44. Australia Gene Synthesis and Synthetic Biology Service Market Size Growth 2021-2026 (\$ millions)

Figure 45. Europe Gene Synthesis and Synthetic Biology Service Market Size Market Share by Country in 2025

Figure 46. Europe Gene Synthesis and Synthetic Biology Service Market Size Market Share by Type (2021-2026)

Figure 47. Europe Gene Synthesis and Synthetic Biology Service Market Size Market Share by Application (2021-2026)

Figure 48. Germany Gene Synthesis and Synthetic Biology Service Market Size Growth 2021-2026 (\$ millions)

Figure 49. France Gene Synthesis and Synthetic Biology Service Market Size Growth 2021-2026 (\$ millions)

Figure 50. UK Gene Synthesis and Synthetic Biology Service Market Size Growth 2021-2026 (\$ millions)

Figure 51. Italy Gene Synthesis and Synthetic Biology Service Market Size Growth 2021-2026 (\$ millions)

Figure 52. Russia Gene Synthesis and Synthetic Biology Service Market Size Growth 2021-2026 (\$ millions)

Figure 53. Middle East & Africa Gene Synthesis and Synthetic Biology Service Market Size Market Share by Region (2021-2026)

Figure 54. Middle East & Africa Gene Synthesis and Synthetic Biology Service Market Size Market Share by Type (2021-2026)

Figure 55. Middle East & Africa Gene Synthesis and Synthetic Biology Service Market Size Market Share by Application (2021-2026)

Figure 56. Egypt Gene Synthesis and Synthetic Biology Service Market Size Growth 2021-2026 (\$ millions)

Figure 57. South Africa Gene Synthesis and Synthetic Biology Service Market Size Growth 2021-2026 (\$ millions)

Figure 58. Israel Gene Synthesis and Synthetic Biology Service Market Size Growth 2021-2026 (\$ millions)

Figure 59. Turkey Gene Synthesis and Synthetic Biology Service Market Size Growth 2021-2026 (\$ millions)

Figure 60. GCC Countries Gene Synthesis and Synthetic Biology Service Market Size Growth 2021-2026 (\$ millions)

Figure 61. Americas Gene Synthesis and Synthetic Biology Service Market Size 2027-2032 (\$ millions)

Figure 62. APAC Gene Synthesis and Synthetic Biology Service Market Size 2027-2032

(\$ millions)

Figure 63. Europe Gene Synthesis and Synthetic Biology Service Market Size
2027-2032 (\$ millions)

Figure 64. Middle East & Africa Gene Synthesis and Synthetic Biology Service Market
Size 2027-2032 (\$ millions)

Figure 65. United States Gene Synthesis and Synthetic Biology Service Market Size
2027-2032 (\$ millions)

Figure 66. Canada Gene Synthesis and Synthetic Biology Service Market Size
2027-2032 (\$ millions)

Figure 67. Mexico Gene Synthesis and Synthetic Biology Service Market Size
2027-2032 (\$ millions)

Figure 68. Brazil Gene Synthesis and Synthetic Biology Service Market Size 2027-2032
(\$ millions)

Figure 69. China Gene Synthesis and Synthetic Biology Service Market Size 2027-2032
(\$ millions)

Figure 70. Japan Gene Synthesis and Synthetic Biology Service Market Size 2027-2032
(\$ millions)

Figure 71. Korea Gene Synthesis and Synthetic Biology Service Market Size 2027-2032
(\$ millions)

Figure 72. Southeast Asia Gene Synthesis and Synthetic Biology Service Market Size
2027-2032 (\$ millions)

Figure 73. India Gene Synthesis and Synthetic Biology Service Market Size 2027-2032
(\$ millions)

Figure 74. Australia Gene Synthesis and Synthetic Biology Service Market Size
2027-2032 (\$ millions)

Figure 75. Germany Gene Synthesis and Synthetic Biology Service Market Size
2027-2032 (\$ millions)

Figure 76. France Gene Synthesis and Synthetic Biology Service Market Size
2027-2032 (\$ millions)

Figure 77. UK Gene Synthesis and Synthetic Biology Service Market Size 2027-2032 (\$
millions)

Figure 78. Italy Gene Synthesis and Synthetic Biology Service Market Size 2027-2032
(\$ millions)

Figure 79. Russia Gene Synthesis and Synthetic Biology Service Market Size
2027-2032 (\$ millions)

Figure 80. Egypt Gene Synthesis and Synthetic Biology Service Market Size 2027-2032
(\$ millions)

Figure 81. South Africa Gene Synthesis and Synthetic Biology Service Market Size
2027-2032 (\$ millions)

Figure 82. Israel Gene Synthesis and Synthetic Biology Service Market Size 2027-2032 (\$ millions)

Figure 83. Turkey Gene Synthesis and Synthetic Biology Service Market Size 2027-2032 (\$ millions)

Figure 84. Global Gene Synthesis and Synthetic Biology Service Market Size Market Share Forecast by Type (2027-2032)

Figure 85. Global Gene Synthesis and Synthetic Biology Service Market Size Market Share Forecast by Application (2027-2032)

Figure 86. GCC Countries Gene Synthesis and Synthetic Biology Service Market Size 2027-2032 (\$ millions)

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