

Global GMP Grade High Salt-Active Nuclease (SAN) Market Growth 2026-2032

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Abstracts

The global GMP Grade High Salt-Active Nuclease (SAN) market size is predicted to grow from US\$ 16.50 million in 2025 to US\$ 90.27 million in 2032; it is expected to grow at a CAGR of 24.7% from 2026 to 2032.

In 2025, global GMP Grade High Salt-Active Nuclease (SAN) production reached approximately 16.9 K MU, with an average global market price of around 998 USD per MU.

GMP Grade High Salt-Active Nuclease (SAN) refers to a GMP-grade, recombinant, non-specific endonuclease that is designed to efficiently degrade residual nucleic acids, including single-stranded and double-stranded DNA and RNA, under high-salt bioprocessing conditions. Unlike conventional nucleases that may show reduced activity in elevated salt environments, high salt-active SAN maintains strong enzymatic activity in salt-containing process streams and is mainly used for host-cell nucleic acid removal, lysate viscosity reduction, chromatin degradation and downstream purification support in viral vector, vaccine, recombinant protein and other biologics manufacturing.

The core value of GMP Grade High Salt-Active Nuclease (SAN) lies in its ability to maintain strong nucleic acid degradation performance under medium- to high-salt bioprocessing conditions, addressing the limitation of conventional nucleases whose activity may decline in high-salt environments. In the manufacturing of AAV, lentiviral vectors, adenoviral vectors, vaccines and recombinant proteins, residual host-cell DNA/RNA, high lysate viscosity and heavy downstream purification burden remain major process challenges. By directly degrading residual nucleic acids in salt-containing process streams, SAN can reduce the need for additional desalting, buffer exchange or process redesign, helping manufacturers improve purification efficiency, simplify

workflows and strengthen consistency in GMP production.

As cell and gene therapy, viral vector manufacturing, vaccines and next-generation biologics move further toward scale-up, regulatory compliance and commercial production, demand is increasing for GMP-grade process enzymes with robust quality systems, batch-to-batch consistency, regulatory documentation and broad process compatibility. Compared with research-grade nucleases, GMP Grade SAN is not merely an enzyme reagent, but a critical biomanufacturing tool that supports process efficiency, impurity control and regulatory readiness. Looking ahead, as high-salt purification strategies become more widely adopted in AAV and related biologics workflows, and as CDMOs and biopharma companies place greater emphasis on residual nucleic acid control, GMP Grade Salt-Active Nuclease is well positioned to become an important enabling material in advanced biomanufacturing.

The upstream raw materials for GMP Grade High Salt-Active Nuclease (SAN) mainly include recombinant expression systems, microbial fermentation media, GMP-grade buffer salts and stabilizers, chromatography packing materials, filtration/ultrafiltration consumables, quality control reagents, and pharmaceutical packaging materials. Representative suppliers include Thermo Fisher Scientific, Merck KGaA/MilliporeSigma, Avantor, Cytiva, Sartorius, Repligen, Kerry, BD Difco, Organotechnie/Solabia, SCHOTT Pharma, Stevanato Group, and West Pharmaceutical. Downstream applications are primarily in recombinant proteins, viral vaccines, and viral vectors. Typical customers include Thermo Fisher, Lonza, Oxford Biomedica, Sanofi, GSK, Merck, Pfizer, AstraZeneca, SK Bioscience, Sinopharm Group, and Sinovac Biotech, among others.

GMP Grade High Salt-Active Nuclease (SAN) varies greatly depending on product type, process path, and degree of automation, with industry gross margins typically ranging from 70% to 80%.

United States market for GMP Grade High Salt-Active Nuclease (SAN) is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

China market for GMP Grade High Salt-Active Nuclease (SAN) is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Europe market for GMP Grade High Salt-Active Nuclease (SAN) is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026

through 2032.

Global key GMP Grade High Salt-Active Nuclease (SAN) players cover ArcticZymes Technologies, New England Biolabs, QIAGEN N.V., Merck KGaA, c-LEcta GmbH, etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

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

This Insight Report provides a comprehensive analysis of the global GMP Grade High Salt-Active Nuclease (SAN) landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on GMP Grade High Salt-Active Nuclease (SAN) portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global GMP Grade High Salt-Active Nuclease (SAN) market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for GMP Grade High Salt-Active Nuclease (SAN) and breaks down the forecast by Target Impurity, 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 GMP Grade High Salt-Active Nuclease (SAN).

This report presents a comprehensive overview, market shares, and growth opportunities of GMP Grade High Salt-Active Nuclease (SAN) market by product type, application, key manufacturers and key regions and countries.

Segmentation by Target Impurity:

Host DNA Clearance Nuclease

Host RNA Clearance Nuclease

Others

Segmentation by Form:

Liquid

Lyophilized Powder

Segmentation by Application:

Recombinant Protein

Viral Vaccine

Viral Vector

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 analysing the company's coverage, product portfolio, its

market penetration.

ArcticZymes Technologies

New England Biolabs

QIAGEN N.V.

Merck KGaA

c-LEcta GmbH

Sino Biological

ACRO Biosystems

Yeasen Biotechnology (Shanghai) Co., Ltd.

TransGen Biotech

Key Questions Addressed in this Report

What is the 10-year outlook for the global GMP Grade High Salt-Active Nuclease (SAN) market?

What factors are driving GMP Grade High Salt-Active Nuclease (SAN) market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do GMP Grade High Salt-Active Nuclease (SAN) market opportunities vary by end market size?

How does GMP Grade High Salt-Active Nuclease (SAN) break out by Target Impurity, by Application?

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