

Global Oligonucleotide Purification Consumables Market Growth 2026-2032

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Abstracts

The global Oligonucleotide Purification Consumables market size is predicted to grow from US\$ 450 million in 2025 to US\$ 1129 million in 2032; it is expected to grow at a CAGR of 14.1% from 2026 to 2032.

Oligonucleotide purification consumables are used for post-synthesis purification, desalting, concentration, and sample cleanup of DNA, RNA, antisense oligonucleotides, siRNA, probes, and aptamers. Common formats include reversed-phase purification mini-columns, desalting columns and plates, preparative liquid chromatography columns, ion exchange or hydrophobic resins, solid-phase extraction plates, and spin columns. Their function is to remove truncated failure sequences, salts, protecting group by-products, coupling by-products, proteins and lipid matrix contaminants, as well as solvent residues, thereby improving purity, recovery yield, and downstream analytical or formulation compatibility. The overall gross margin is approximately 60%.

Demand for oligonucleotide purification consumables is gradually shifting from research and small-scale applications toward clinical sample preparation and commercial-scale manufacturing. The development of antisense oligonucleotides, small interfering RNA, aptamers, mRNA key raw materials, and gene therapy-related nucleic acid fragments has increased the requirement for high-loading capacity, high-resolution separation, low residual impurities, and scalable purification materials. As nucleic acid drug pipelines expand, purification steps play an increasingly important role in impurity removal, salt exchange, truncated sequence control, and batch consistency. From a product structure perspective, ion exchange, reversed-phase, hydrophilic interaction, and size exclusion chromatography resins and prepacked columns remain the core consumables for high-purity oligonucleotide production. Ultrafiltration membranes, desalting columns, solid-phase extraction consumables, and single-use flow path components support

concentration, buffer exchange, and process integration. Customers typically focus on binding capacity, separation efficiency, chemical compatibility, cleanability, batch-to-batch consistency, and regulatory documentation support, and manufacturers increasingly prefer platform-based consumables that can be used from R&D through scale-up. In terms of competition, international suppliers still hold advantages in high-end resins, process validation, and global supply stability, while domestic manufacturers mainly enter through research-grade consumables, prepacked columns, localized delivery, and customized services. Future opportunities lie not only in single-product substitution but in providing integrated purification consumable solutions across nucleic acid drug workflows, including capture, polishing, desalting and concentration, and single-use process connectivity systems. Suppliers with strong batch consistency, application data, and regulatory support capabilities are more likely to penetrate pilot and commercial manufacturing customers.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Oligonucleotide Purification Consumables 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 Oligonucleotide Purification Consumables.

This report presents a comprehensive overview, market shares, and growth opportunities of Oligonucleotide Purification Consumables market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Purification Cartridges

Desalting Columns and Plates

Preparative HPLC Columns

Chromatography Resins

SPE Plates and Cartridges

Spin Columns

Segmentation by Separation Mode:

DMT-On Hydrophobic Capture

Ion-Pair Reversed-Phase

Anion Exchange

Hydrophobic Interaction

Size Exclusion and Desalting

Mixed-Mode WAX SPE

Segmentation by Target Oligonucleotide:

DNA Oligonucleotides

RNA Oligonucleotides

Antisense Oligonucleotides

siRNA and Duplex Oligos

Aptamers and Probes

Long Oligos and sgRNA

Segmentation by Compatible Platform:

HPLC Systems

FPLC and Bioprocess Columns

Vacuum Manifolds

Centrifuges

Liquid Handling Workstations

LC-MS Sample Prep Workflows

Segmentation by Application:

Research Oligo Cleanup

Diagnostic Primer and Probe Production

Therapeutic Oligo Process Development

GMP Oligo Manufacturing

Bioanalytical Sample Preparation

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 analysing the company's coverage, product portfolio, its market penetration.

Waters

Agilent

Thermo Fisher Scientific

Glen Research

DuPont

Bio-Rad

Tosoh Bioscience

YMC

Phenomenex

Biotage

Biocomma

Bio-Works

ADS Biotec

Key Questions Addressed in this Report

What is the 10-year outlook for the global Oligonucleotide Purification Consumables market?

What factors are driving Oligonucleotide Purification Consumables market growth, globally and by region?

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

How do Oligonucleotide Purification Consumables market opportunities vary by end market size?

How does Oligonucleotide Purification Consumables break out by Type, by Application?

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 Oligonucleotide Purification Consumables Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for Oligonucleotide Purification Consumables by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for Oligonucleotide Purification Consumables by Country/Region, 2021, 2025 & 2032
- 2.2 Oligonucleotide Purification Consumables Segment by Type
 - 2.2.1 Purification Cartridges
 - 2.2.2 Desalting Columns and Plates
 - 2.2.3 Preparative HPLC Columns
 - 2.2.4 Chromatography Resins
 - 2.2.5 SPE Plates and Cartridges
 - 2.2.6 Spin Columns
 - 2.2.7 Oligonucleotide Purification Consumables Sales by Type
 - 2.2.7.1 Global Oligonucleotide Purification Consumables Sales Market Share by Type (2021-2026)
 - 2.2.7.2 Global Oligonucleotide Purification Consumables Revenue and Market Share by Type (2021-2026)
 - 2.2.7.3 Global Oligonucleotide Purification Consumables Sale Price by Type (2021-2026)
- 2.3 Oligonucleotide Purification Consumables Segment by Separation Mode
 - 2.3.1 DMT-On Hydrophobic Capture
 - 2.3.2 Ion-Pair Reversed-Phase
 - 2.3.3 Anion Exchange

2.3.4 Hydrophobic Interaction

2.3.5 Size Exclusion and Desalting

2.3.6 Mixed-Mode WAX SPE

2.3.7 Oligonucleotide Purification Consumables Sales by Separation Mode

2.3.7.1 Global Oligonucleotide Purification Consumables Sales Market Share by Separation Mode (2021-2026)

2.3.7.2 Global Oligonucleotide Purification Consumables Revenue and Market Share by Separation Mode (2021-2026)

2.3.7.3 Global Oligonucleotide Purification Consumables Sale Price by Separation Mode (2021-2026)

2.4 Oligonucleotide Purification Consumables Segment by Target Oligonucleotide

2.4.1 DNA Oligonucleotides

2.4.2 RNA Oligonucleotides

2.4.3 Antisense Oligonucleotides

2.4.4 siRNA and Duplex Oligos

2.4.5 Aptamers and Probes

2.4.6 Long Oligos and sgRNA

2.4.7 Oligonucleotide Purification Consumables Sales by Target Oligonucleotide

2.4.7.1 Global Oligonucleotide Purification Consumables Sales Market Share by Target Oligonucleotide (2021-2026)

2.4.7.2 Global Oligonucleotide Purification Consumables Revenue and Market Share by Target Oligonucleotide (2021-2026)

2.4.7.3 Global Oligonucleotide Purification Consumables Sale Price by Target Oligonucleotide (2021-2026)

2.5 Oligonucleotide Purification Consumables Segment by Compatible Platform

2.5.1 HPLC Systems

2.5.2 FPLC and Bioprocess Columns

2.5.3 Vacuum Manifolds

2.5.4 Centrifuges

2.5.5 Liquid Handling Workstations

2.5.6 LC-MS Sample Prep Workflows

2.5.7 Oligonucleotide Purification Consumables Sales by Compatible Platform

2.5.7.1 Global Oligonucleotide Purification Consumables Sales Market Share by Compatible Platform (2021-2026)

2.5.7.2 Global Oligonucleotide Purification Consumables Revenue and Market Share by Compatible Platform (2021-2026)

2.5.7.3 Global Oligonucleotide Purification Consumables Sale Price by Compatible Platform (2021-2026)

2.6 Oligonucleotide Purification Consumables Segment by Application

- 2.6.1 Research Oligo Cleanup
- 2.6.2 Diagnostic Primer and Probe Production
- 2.6.3 Therapeutic Oligo Process Development
- 2.6.4 GMP Oligo Manufacturing
- 2.6.5 Bioanalytical Sample Preparation
- 2.6.6 Other
- 2.6.7 Oligonucleotide Purification Consumables Sales by Application
 - 2.6.7.1 Global Oligonucleotide Purification Consumables Sale Market Share by Application (2021-2026)
 - 2.6.7.2 Global Oligonucleotide Purification Consumables Revenue and Market Share by Application (2021-2026)
 - 2.6.7.3 Global Oligonucleotide Purification Consumables Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

- 3.1 Global Oligonucleotide Purification Consumables Breakdown Data by Company
 - 3.1.1 Global Oligonucleotide Purification Consumables Annual Sales by Company (2021-2026)
 - 3.1.2 Global Oligonucleotide Purification Consumables Sales Market Share by Company (2021-2026)
- 3.2 Global Oligonucleotide Purification Consumables Annual Revenue by Company (2021-2026)
 - 3.2.1 Global Oligonucleotide Purification Consumables Revenue by Company (2021-2026)
 - 3.2.2 Global Oligonucleotide Purification Consumables Revenue Market Share by Company (2021-2026)
- 3.3 Global Oligonucleotide Purification Consumables Sale Price by Company
- 3.4 Key Manufacturers Oligonucleotide Purification Consumables Producing Area Distribution, Sales Area, Product Type
 - 3.4.1 Key Manufacturers Oligonucleotide Purification Consumables Product Location Distribution
 - 3.4.2 Players Oligonucleotide Purification Consumables Products Offered
- 3.5 Market Concentration Rate Analysis
 - 3.5.1 Competition Landscape Analysis
 - 3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- 3.6 New Products and Potential Entrants
- 3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR OLIGONUCLEOTIDE PURIFICATION CONSUMABLES BY GEOGRAPHIC REGION

4.1 World Historic Oligonucleotide Purification Consumables Market Size by Geographic Region (2021-2026)

4.1.1 Global Oligonucleotide Purification Consumables Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Oligonucleotide Purification Consumables Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Oligonucleotide Purification Consumables Market Size by Country/Region (2021-2026)

4.2.1 Global Oligonucleotide Purification Consumables Annual Sales by Country/Region (2021-2026)

4.2.2 Global Oligonucleotide Purification Consumables Annual Revenue by Country/Region (2021-2026)

4.3 Americas Oligonucleotide Purification Consumables Sales Growth

4.4 APAC Oligonucleotide Purification Consumables Sales Growth

4.5 Europe Oligonucleotide Purification Consumables Sales Growth

4.6 Middle East & Africa Oligonucleotide Purification Consumables Sales Growth

5 AMERICAS

5.1 Americas Oligonucleotide Purification Consumables Sales by Country

5.1.1 Americas Oligonucleotide Purification Consumables Sales by Country (2021-2026)

5.1.2 Americas Oligonucleotide Purification Consumables Revenue by Country (2021-2026)

5.2 Americas Oligonucleotide Purification Consumables Sales by Type (2021-2026)

5.3 Americas Oligonucleotide Purification Consumables Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Oligonucleotide Purification Consumables Sales by Region

6.1.1 APAC Oligonucleotide Purification Consumables Sales by Region (2021-2026)

- 6.1.2 APAC Oligonucleotide Purification Consumables Revenue by Region (2021-2026)
- 6.2 APAC Oligonucleotide Purification Consumables Sales by Type (2021-2026)
- 6.3 APAC Oligonucleotide Purification Consumables Sales by Application (2021-2026)
- 6.4 China
- 6.5 Japan
- 6.6 South Korea
- 6.7 Southeast Asia
- 6.8 India
- 6.9 Australia
- 6.10 China Taiwan

7 EUROPE

- 7.1 Europe Oligonucleotide Purification Consumables by Country
 - 7.1.1 Europe Oligonucleotide Purification Consumables Sales by Country (2021-2026)
 - 7.1.2 Europe Oligonucleotide Purification Consumables Revenue by Country (2021-2026)
- 7.2 Europe Oligonucleotide Purification Consumables Sales by Type (2021-2026)
- 7.3 Europe Oligonucleotide Purification Consumables Sales 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 Oligonucleotide Purification Consumables by Country
 - 8.1.1 Middle East & Africa Oligonucleotide Purification Consumables Sales by Country (2021-2026)
 - 8.1.2 Middle East & Africa Oligonucleotide Purification Consumables Revenue by Country (2021-2026)
- 8.2 Middle East & Africa Oligonucleotide Purification Consumables Sales by Type (2021-2026)
- 8.3 Middle East & Africa Oligonucleotide Purification Consumables Sales 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 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Oligonucleotide Purification Consumables

10.3 Manufacturing Process Analysis of Oligonucleotide Purification Consumables

10.4 Industry Chain Structure of Oligonucleotide Purification Consumables

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Oligonucleotide Purification Consumables Distributors

11.3 Oligonucleotide Purification Consumables Customer

12 WORLD FORECAST REVIEW FOR OLIGONUCLEOTIDE PURIFICATION CONSUMABLES BY GEOGRAPHIC REGION

12.1 Global Oligonucleotide Purification Consumables Market Size Forecast by Region

12.1.1 Global Oligonucleotide Purification Consumables Forecast by Region (2027-2032)

12.1.2 Global Oligonucleotide Purification Consumables Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Oligonucleotide Purification Consumables Forecast by Type (2027-2032)

12.7 Global Oligonucleotide Purification Consumables Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Waters

13.1.1 Waters Company Information

13.1.2 Waters Oligonucleotide Purification Consumables Product Portfolios and Specifications

13.1.3 Waters Oligonucleotide Purification Consumables Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Waters Main Business Overview

13.1.5 Waters Latest Developments

13.2 Agilent

13.2.1 Agilent Company Information

13.2.2 Agilent Oligonucleotide Purification Consumables Product Portfolios and Specifications

13.2.3 Agilent Oligonucleotide Purification Consumables Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Agilent Main Business Overview

13.2.5 Agilent Latest Developments

13.3 Thermo Fisher Scientific

13.3.1 Thermo Fisher Scientific Company Information

13.3.2 Thermo Fisher Scientific Oligonucleotide Purification Consumables Product Portfolios and Specifications

13.3.3 Thermo Fisher Scientific Oligonucleotide Purification Consumables Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 Thermo Fisher Scientific Main Business Overview

13.3.5 Thermo Fisher Scientific Latest Developments

13.4 Glen Research

13.4.1 Glen Research Company Information

13.4.2 Glen Research Oligonucleotide Purification Consumables Product Portfolios and Specifications

13.4.3 Glen Research Oligonucleotide Purification Consumables Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 Glen Research Main Business Overview

13.4.5 Glen Research Latest Developments

13.5 DuPont

13.5.1 DuPont Company Information

13.5.2 DuPont Oligonucleotide Purification Consumables Product Portfolios and Specifications

13.5.3 DuPont Oligonucleotide Purification Consumables Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 DuPont Main Business Overview

13.5.5 DuPont Latest Developments

13.6 Bio-Rad

13.6.1 Bio-Rad Company Information

13.6.2 Bio-Rad Oligonucleotide Purification Consumables Product Portfolios and Specifications

13.6.3 Bio-Rad Oligonucleotide Purification Consumables Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 Bio-Rad Main Business Overview

13.6.5 Bio-Rad Latest Developments

13.7 Tosoh Bioscience

13.7.1 Tosoh Bioscience Company Information

13.7.2 Tosoh Bioscience Oligonucleotide Purification Consumables Product Portfolios and Specifications

13.7.3 Tosoh Bioscience Oligonucleotide Purification Consumables Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 Tosoh Bioscience Main Business Overview

13.7.5 Tosoh Bioscience Latest Developments

13.8 YMC

13.8.1 YMC Company Information

13.8.2 YMC Oligonucleotide Purification Consumables Product Portfolios and Specifications

13.8.3 YMC Oligonucleotide Purification Consumables Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 YMC Main Business Overview

13.8.5 YMC Latest Developments

13.9 Phenomenex

13.9.1 Phenomenex Company Information

13.9.2 Phenomenex Oligonucleotide Purification Consumables Product Portfolios and Specifications

13.9.3 Phenomenex Oligonucleotide Purification Consumables Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 Phenomenex Main Business Overview

13.9.5 Phenomenex Latest Developments

13.10 Biotage

- 13.10.1 Biotage Company Information
- 13.10.2 Biotage Oligonucleotide Purification Consumables Product Portfolios and Specifications
- 13.10.3 Biotage Oligonucleotide Purification Consumables Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.10.4 Biotage Main Business Overview
- 13.10.5 Biotage Latest Developments
- 13.11 Biocomma
 - 13.11.1 Biocomma Company Information
 - 13.11.2 Biocomma Oligonucleotide Purification Consumables Product Portfolios and Specifications
 - 13.11.3 Biocomma Oligonucleotide Purification Consumables Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.11.4 Biocomma Main Business Overview
 - 13.11.5 Biocomma Latest Developments
- 13.12 Bio-Works
 - 13.12.1 Bio-Works Company Information
 - 13.12.2 Bio-Works Oligonucleotide Purification Consumables Product Portfolios and Specifications
 - 13.12.3 Bio-Works Oligonucleotide Purification Consumables Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.12.4 Bio-Works Main Business Overview
 - 13.12.5 Bio-Works Latest Developments
- 13.13 ADS Biotec
 - 13.13.1 ADS Biotec Company Information
 - 13.13.2 ADS Biotec Oligonucleotide Purification Consumables Product Portfolios and Specifications
 - 13.13.3 ADS Biotec Oligonucleotide Purification Consumables Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.13.4 ADS Biotec Main Business Overview
 - 13.13.5 ADS Biotec Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

- Table 1. Oligonucleotide Purification Consumables Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Table 2. Oligonucleotide Purification Consumables Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of Purification Cartridges
- Table 4. Major Players of Desalting Columns and Plates
- Table 5. Major Players of Preparative HPLC Columns
- Table 6. Major Players of Chromatography Resins
- Table 7. Major Players of SPE Plates and Cartridges
- Table 8. Major Players of Spin Columns
- Table 9. Global Oligonucleotide Purification Consumables Sales by Type (2021-2026) & (Units)
- Table 10. Global Oligonucleotide Purification Consumables Sales Market Share by Type (2021-2026)
- Table 11. Global Oligonucleotide Purification Consumables Revenue by Type (2021-2026) & (\$ million)
- Table 12. Global Oligonucleotide Purification Consumables Revenue Market Share by Type (2021-2026)
- Table 13. Global Oligonucleotide Purification Consumables Sale Price by Type (2021-2026) & (US\$/Unit)
- Table 14. Major Players of DMT-On Hydrophobic Capture
- Table 15. Major Players of Ion-Pair Reversed-Phase
- Table 16. Major Players of Anion Exchange
- Table 17. Major Players of Hydrophobic Interaction
- Table 18. Major Players of Size Exclusion and Desalting
- Table 19. Major Players of Mixed-Mode WAX SPE
- Table 20. Global Oligonucleotide Purification Consumables Sales by Separation Mode (2021-2026) & (Units)
- Table 21. Global Oligonucleotide Purification Consumables Sales Market Share by Separation Mode (2021-2026)
- Table 22. Global Oligonucleotide Purification Consumables Revenue by Separation Mode (2021-2026) & (\$ million)
- Table 23. Global Oligonucleotide Purification Consumables Revenue Market Share by Separation Mode (2021-2026)
- Table 24. Global Oligonucleotide Purification Consumables Sale Price by Separation

Mode (2021-2026) & (US\$/Unit)

Table 25. Major Players of DNA Oligonucleotides

Table 26. Major Players of RNA Oligonucleotides

Table 27. Major Players of Antisense Oligonucleotides

Table 28. Major Players of siRNA and Duplex Oligos

Table 29. Major Players of Aptamers and Probes

Table 30. Major Players of Long Oligos and sgRNA

Table 31. Global Oligonucleotide Purification Consumables Sales by Target Oligonucleotide (2021-2026) & (Units)

Table 32. Global Oligonucleotide Purification Consumables Sales Market Share by Target Oligonucleotide (2021-2026)

Table 33. Global Oligonucleotide Purification Consumables Revenue by Target Oligonucleotide (2021-2026) & (\$ million)

Table 34. Global Oligonucleotide Purification Consumables Revenue Market Share by Target Oligonucleotide (2021-2026)

Table 35. Global Oligonucleotide Purification Consumables Sale Price by Target Oligonucleotide (2021-2026) & (US\$/Unit)

Table 36. Major Players of HPLC Systems

Table 37. Major Players of FPLC and Bioprocess Columns

Table 38. Major Players of Vacuum Manifolds

Table 39. Major Players of Centrifuges

Table 40. Major Players of Liquid Handling Workstations

Table 41. Major Players of LC-MS Sample Prep Workflows

Table 42. Global Oligonucleotide Purification Consumables Sales by Compatible Platform (2021-2026) & (Units)

Table 43. Global Oligonucleotide Purification Consumables Sales Market Share by Compatible Platform (2021-2026)

Table 44. Global Oligonucleotide Purification Consumables Revenue by Compatible Platform (2021-2026) & (\$ million)

Table 45. Global Oligonucleotide Purification Consumables Revenue Market Share by Compatible Platform (2021-2026)

Table 46. Global Oligonucleotide Purification Consumables Sale Price by Compatible Platform (2021-2026) & (US\$/Unit)

Table 47. Global Oligonucleotide Purification Consumables Sale by Application (2021-2026) & (Units)

Table 48. Global Oligonucleotide Purification Consumables Sale Market Share by Application (2021-2026)

Table 49. Global Oligonucleotide Purification Consumables Revenue by Application (2021-2026) & (\$ million)

Table 50. Global Oligonucleotide Purification Consumables Revenue Market Share by Application (2021-2026)

Table 51. Global Oligonucleotide Purification Consumables Sale Price by Application (2021-2026) & (US\$/Unit)

Table 52. Global Oligonucleotide Purification Consumables Sales by Company (2021-2026) & (Units)

Table 53. Global Oligonucleotide Purification Consumables Sales Market Share by Company (2021-2026)

Table 54. Global Oligonucleotide Purification Consumables Revenue by Company (2021-2026) & (\$ millions)

Table 55. Global Oligonucleotide Purification Consumables Revenue Market Share by Company (2021-2026)

Table 56. Global Oligonucleotide Purification Consumables Sale Price by Company (2021-2026) & (US\$/Unit)

Table 57. Key Manufacturers Oligonucleotide Purification Consumables Producing Area Distribution and Sales Area

Table 58. Players Oligonucleotide Purification Consumables Products Offered

Table 59. Oligonucleotide Purification Consumables Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 60. New Products and Potential Entrants

Table 61. Market M&A Activity & Strategy

Table 62. Global Oligonucleotide Purification Consumables Sales by Geographic Region (2021-2026) & (Units)

Table 63. Global Oligonucleotide Purification Consumables Sales Market Share Geographic Region (2021-2026)

Table 64. Global Oligonucleotide Purification Consumables Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 65. Global Oligonucleotide Purification Consumables Revenue Market Share by Geographic Region (2021-2026)

Table 66. Global Oligonucleotide Purification Consumables Sales by Country/Region (2021-2026) & (Units)

Table 67. Global Oligonucleotide Purification Consumables Sales Market Share by Country/Region (2021-2026)

Table 68. Global Oligonucleotide Purification Consumables Revenue by Country/Region (2021-2026) & (\$ millions)

Table 69. Global Oligonucleotide Purification Consumables Revenue Market Share by Country/Region (2021-2026)

Table 70. Americas Oligonucleotide Purification Consumables Sales by Country (2021-2026) & (Units)

Table 71. Americas Oligonucleotide Purification Consumables Sales Market Share by Country (2021-2026)

Table 72. Americas Oligonucleotide Purification Consumables Revenue by Country (2021-2026) & (\$ millions)

Table 73. Americas Oligonucleotide Purification Consumables Sales by Type (2021-2026) & (Units)

Table 74. Americas Oligonucleotide Purification Consumables Sales by Application (2021-2026) & (Units)

Table 75. APAC Oligonucleotide Purification Consumables Sales by Region (2021-2026) & (Units)

Table 76. APAC Oligonucleotide Purification Consumables Sales Market Share by Region (2021-2026)

Table 77. APAC Oligonucleotide Purification Consumables Revenue by Region (2021-2026) & (\$ millions)

Table 78. APAC Oligonucleotide Purification Consumables Sales by Type (2021-2026) & (Units)

Table 79. APAC Oligonucleotide Purification Consumables Sales by Application (2021-2026) & (Units)

Table 80. Europe Oligonucleotide Purification Consumables Sales by Country (2021-2026) & (Units)

Table 81. Europe Oligonucleotide Purification Consumables Revenue by Country (2021-2026) & (\$ millions)

Table 82. Europe Oligonucleotide Purification Consumables Sales by Type (2021-2026) & (Units)

Table 83. Europe Oligonucleotide Purification Consumables Sales by Application (2021-2026) & (Units)

Table 84. Middle East & Africa Oligonucleotide Purification Consumables Sales by Country (2021-2026) & (Units)

Table 85. Middle East & Africa Oligonucleotide Purification Consumables Revenue Market Share by Country (2021-2026)

Table 86. Middle East & Africa Oligonucleotide Purification Consumables Sales by Type (2021-2026) & (Units)

Table 87. Middle East & Africa Oligonucleotide Purification Consumables Sales by Application (2021-2026) & (Units)

Table 88. Key Market Drivers & Growth Opportunities of Oligonucleotide Purification Consumables

Table 89. Key Market Challenges & Risks of Oligonucleotide Purification Consumables

Table 90. Key Industry Trends of Oligonucleotide Purification Consumables

Table 91. Oligonucleotide Purification Consumables Raw Material

Table 92. Key Suppliers of Raw Materials
Table 93. Oligonucleotide Purification Consumables Distributors List
Table 94. Oligonucleotide Purification Consumables Customer List
Table 95. Global Oligonucleotide Purification Consumables Sales Forecast by Region (2027-2032) & (Units)
Table 96. Global Oligonucleotide Purification Consumables Revenue Forecast by Region (2027-2032) & (\$ millions)
Table 97. Americas Oligonucleotide Purification Consumables Sales Forecast by Country (2027-2032) & (Units)
Table 98. Americas Oligonucleotide Purification Consumables Annual Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 99. APAC Oligonucleotide Purification Consumables Sales Forecast by Region (2027-2032) & (Units)
Table 100. APAC Oligonucleotide Purification Consumables Annual Revenue Forecast by Region (2027-2032) & (\$ millions)
Table 101. Europe Oligonucleotide Purification Consumables Sales Forecast by Country (2027-2032) & (Units)
Table 102. Europe Oligonucleotide Purification Consumables Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 103. Middle East & Africa Oligonucleotide Purification Consumables Sales Forecast by Country (2027-2032) & (Units)
Table 104. Middle East & Africa Oligonucleotide Purification Consumables Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 105. Global Oligonucleotide Purification Consumables Sales Forecast by Type (2027-2032) & (Units)
Table 106. Global Oligonucleotide Purification Consumables Revenue Forecast by Type (2027-2032) & (\$ millions)
Table 107. Global Oligonucleotide Purification Consumables Sales Forecast by Application (2027-2032) & (Units)
Table 108. Global Oligonucleotide Purification Consumables Revenue Forecast by Application (2027-2032) & (\$ millions)
Table 109. Waters Basic Information, Oligonucleotide Purification Consumables Manufacturing Base, Sales Area and Its Competitors
Table 110. Waters Oligonucleotide Purification Consumables Product Portfolios and Specifications
Table 111. Waters Oligonucleotide Purification Consumables Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 112. Waters Main Business
Table 113. Waters Latest Developments

Table 114. Agilent Basic Information, Oligonucleotide Purification Consumables Manufacturing Base, Sales Area and Its Competitors

Table 115. Agilent Oligonucleotide Purification Consumables Product Portfolios and Specifications

Table 116. Agilent Oligonucleotide Purification Consumables Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 117. Agilent Main Business

Table 118. Agilent Latest Developments

Table 119. Thermo Fisher Scientific Basic Information, Oligonucleotide Purification Consumables Manufacturing Base, Sales Area and Its Competitors

Table 120. Thermo Fisher Scientific Oligonucleotide Purification Consumables Product Portfolios and Specifications

Table 121. Thermo Fisher Scientific Oligonucleotide Purification Consumables Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 122. Thermo Fisher Scientific Main Business

Table 123. Thermo Fisher Scientific Latest Developments

Table 124. Glen Research Basic Information, Oligonucleotide Purification Consumables Manufacturing Base, Sales Area and Its Competitors

Table 125. Glen Research Oligonucleotide Purification Consumables Product Portfolios and Specifications

Table 126. Glen Research Oligonucleotide Purification Consumables Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 127. Glen Research Main Business

Table 128. Glen Research Latest Developments

Table 129. DuPont Basic Information, Oligonucleotide Purification Consumables Manufacturing Base, Sales Area and Its Competitors

Table 130. DuPont Oligonucleotide Purification Consumables Product Portfolios and Specifications

Table 131. DuPont Oligonucleotide Purification Consumables Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 132. DuPont Main Business

Table 133. DuPont Latest Developments

Table 134. Bio-Rad Basic Information, Oligonucleotide Purification Consumables Manufacturing Base, Sales Area and Its Competitors

Table 135. Bio-Rad Oligonucleotide Purification Consumables Product Portfolios and Specifications

Table 136. Bio-Rad Oligonucleotide Purification Consumables Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 137. Bio-Rad Main Business

Table 138. Bio-Rad Latest Developments

Table 139. Tosoh Bioscience Basic Information, Oligonucleotide Purification Consumables Manufacturing Base, Sales Area and Its Competitors

Table 140. Tosoh Bioscience Oligonucleotide Purification Consumables Product Portfolios and Specifications

Table 141. Tosoh Bioscience Oligonucleotide Purification Consumables Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 142. Tosoh Bioscience Main Business

Table 143. Tosoh Bioscience Latest Developments

Table 144. YMC Basic Information, Oligonucleotide Purification Consumables Manufacturing Base, Sales Area and Its Competitors

Table 145. YMC Oligonucleotide Purification Consumables Product Portfolios and Specifications

Table 146. YMC Oligonucleotide Purification Consumables Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 147. YMC Main Business

Table 148. YMC Latest Developments

Table 149. Phenomenex Basic Information, Oligonucleotide Purification Consumables Manufacturing Base, Sales Area and Its Competitors

Table 150. Phenomenex Oligonucleotide Purification Consumables Product Portfolios and Specifications

Table 151. Phenomenex Oligonucleotide Purification Consumables Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 152. Phenomenex Main Business

Table 153. Phenomenex Latest Developments

Table 154. Biotage Basic Information, Oligonucleotide Purification Consumables Manufacturing Base, Sales Area and Its Competitors

Table 155. Biotage Oligonucleotide Purification Consumables Product Portfolios and Specifications

Table 156. Biotage Oligonucleotide Purification Consumables Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 157. Biotage Main Business

Table 158. Biotage Latest Developments

Table 159. Biocomma Basic Information, Oligonucleotide Purification Consumables Manufacturing Base, Sales Area and Its Competitors

Table 160. Biocomma Oligonucleotide Purification Consumables Product Portfolios and Specifications

Table 161. Biocomma Oligonucleotide Purification Consumables Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 162. Biocomma Main Business

Table 163. Biocomma Latest Developments

Table 164. Bio-Works Basic Information, Oligonucleotide Purification Consumables Manufacturing Base, Sales Area and Its Competitors

Table 165. Bio-Works Oligonucleotide Purification Consumables Product Portfolios and Specifications

Table 166. Bio-Works Oligonucleotide Purification Consumables Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 167. Bio-Works Main Business

Table 168. Bio-Works Latest Developments

Table 169. ADS Biotec Basic Information, Oligonucleotide Purification Consumables Manufacturing Base, Sales Area and Its Competitors

Table 170. ADS Biotec Oligonucleotide Purification Consumables Product Portfolios and Specifications

Table 171. ADS Biotec Oligonucleotide Purification Consumables Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 172. ADS Biotec Main Business

Table 173. ADS Biotec Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Oligonucleotide Purification Consumables
- Figure 2. Oligonucleotide Purification Consumables Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Oligonucleotide Purification Consumables Sales Growth Rate 2021-2032 (Units)
- Figure 7. Global Oligonucleotide Purification Consumables Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Oligonucleotide Purification Consumables Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Oligonucleotide Purification Consumables Sales Market Share by Country/Region (2025)
- Figure 10. Oligonucleotide Purification Consumables Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Purification Cartridges
- Figure 12. Product Picture of Desalting Columns and Plates
- Figure 13. Product Picture of Preparative HPLC Columns
- Figure 14. Product Picture of Chromatography Resins
- Figure 15. Product Picture of SPE Plates and Cartridges
- Figure 16. Product Picture of Spin Columns
- Figure 17. Global Oligonucleotide Purification Consumables Sales Market Share by Type in 2026
- Figure 18. Global Oligonucleotide Purification Consumables Revenue Market Share by Type (2021-2026)
- Figure 19. Product Picture of DMT-On Hydrophobic Capture
- Figure 20. Product Picture of Ion-Pair Reversed-Phase
- Figure 21. Product Picture of Anion Exchange
- Figure 22. Product Picture of Hydrophobic Interaction
- Figure 23. Product Picture of Size Exclusion and Desalting
- Figure 24. Product Picture of Mixed-Mode WAX SPE
- Figure 25. Global Oligonucleotide Purification Consumables Sales Market Share by Separation Mode in 2026
- Figure 26. Global Oligonucleotide Purification Consumables Revenue Market Share by Separation Mode (2021-2026)

Figure 27. Product Picture of DNA Oligonucleotides

Figure 28. Product Picture of RNA Oligonucleotides

Figure 29. Product Picture of Antisense Oligonucleotides

Figure 30. Product Picture of siRNA and Duplex Oligos

Figure 31. Product Picture of Aptamers and Probes

Figure 32. Product Picture of Long Oligos and sgRNA

Figure 33. Global Oligonucleotide Purification Consumables Sales Market Share by Target Oligonucleotide in 2026

Figure 34. Global Oligonucleotide Purification Consumables Revenue Market Share by Target Oligonucleotide (2021-2026)

Figure 35. Product Picture of HPLC Systems

Figure 36. Product Picture of FPLC and Bioprocess Columns

Figure 37. Product Picture of Vacuum Manifolds

Figure 38. Product Picture of Centrifuges

Figure 39. Product Picture of Liquid Handling Workstations

Figure 40. Product Picture of LC-MS Sample Prep Workflows

Figure 41. Global Oligonucleotide Purification Consumables Sales Market Share by Compatible Platform in 2026

Figure 42. Global Oligonucleotide Purification Consumables Revenue Market Share by Compatible Platform (2021-2026)

Figure 43. Oligonucleotide Purification Consumables Consumed in Research Oligo Cleanup

Figure 44. Global Oligonucleotide Purification Consumables Market: Research Oligo Cleanup (2021-2026) & (Units)

Figure 45. Oligonucleotide Purification Consumables Consumed in Diagnostic Primer and Probe Production

Figure 46. Global Oligonucleotide Purification Consumables Market: Diagnostic Primer and Probe Production (2021-2026) & (Units)

Figure 47. Oligonucleotide Purification Consumables Consumed in Therapeutic Oligo Process Development

Figure 48. Global Oligonucleotide Purification Consumables Market: Therapeutic Oligo Process Development (2021-2026) & (Units)

Figure 49. Oligonucleotide Purification Consumables Consumed in GMP Oligo Manufacturing

Figure 50. Global Oligonucleotide Purification Consumables Market: GMP Oligo Manufacturing (2021-2026) & (Units)

Figure 51. Oligonucleotide Purification Consumables Consumed in Bioanalytical Sample Preparation

Figure 52. Global Oligonucleotide Purification Consumables Market: Bioanalytical

Sample Preparation (2021-2026) & (Units)

Figure 53. Oligonucleotide Purification Consumables Consumed in Other

Figure 54. Global Oligonucleotide Purification Consumables Market: Other (2021-2026) & (Units)

Figure 55. Global Oligonucleotide Purification Consumables Sale Market Share by Application (2025)

Figure 56. Global Oligonucleotide Purification Consumables Revenue Market Share by Application in 2025

Figure 57. Oligonucleotide Purification Consumables Sales by Company in 2025 (Units)

Figure 58. Global Oligonucleotide Purification Consumables Sales Market Share by Company in 2025

Figure 59. Oligonucleotide Purification Consumables Revenue by Company in 2025 (\$ millions)

Figure 60. Global Oligonucleotide Purification Consumables Revenue Market Share by Company in 2025

Figure 61. Global Oligonucleotide Purification Consumables Sales Market Share by Geographic Region (2021-2026)

Figure 62. Global Oligonucleotide Purification Consumables Revenue Market Share by Geographic Region in 2025

Figure 63. Americas Oligonucleotide Purification Consumables Sales 2021-2026 (Units)

Figure 64. Americas Oligonucleotide Purification Consumables Revenue 2021-2026 (\$ millions)

Figure 65. APAC Oligonucleotide Purification Consumables Sales 2021-2026 (Units)

Figure 66. APAC Oligonucleotide Purification Consumables Revenue 2021-2026 (\$ millions)

Figure 67. Europe Oligonucleotide Purification Consumables Sales 2021-2026 (Units)

Figure 68. Europe Oligonucleotide Purification Consumables Revenue 2021-2026 (\$ millions)

Figure 69. Middle East & Africa Oligonucleotide Purification Consumables Sales 2021-2026 (Units)

Figure 70. Middle East & Africa Oligonucleotide Purification Consumables Revenue 2021-2026 (\$ millions)

Figure 71. Americas Oligonucleotide Purification Consumables Sales Market Share by Country in 2025

Figure 72. Americas Oligonucleotide Purification Consumables Revenue Market Share by Country (2021-2026)

Figure 73. Americas Oligonucleotide Purification Consumables Sales Market Share by Type (2021-2026)

Figure 74. Americas Oligonucleotide Purification Consumables Sales Market Share by

Application (2021-2026)

Figure 75. United States Oligonucleotide Purification Consumables Revenue Growth 2021-2026 (\$ millions)

Figure 76. Canada Oligonucleotide Purification Consumables Revenue Growth 2021-2026 (\$ millions)

Figure 77. Mexico Oligonucleotide Purification Consumables Revenue Growth 2021-2026 (\$ millions)

Figure 78. Brazil Oligonucleotide Purification Consumables Revenue Growth 2021-2026 (\$ millions)

Figure 79. APAC Oligonucleotide Purification Consumables Sales Market Share by Region in 2025

Figure 80. APAC Oligonucleotide Purification Consumables Revenue Market Share by Region (2021-2026)

Figure 81. APAC Oligonucleotide Purification Consumables Sales Market Share by Type (2021-2026)

Figure 82. APAC Oligonucleotide Purification Consumables Sales Market Share by Application (2021-2026)

Figure 83. China Oligonucleotide Purification Consumables Revenue Growth 2021-2026 (\$ millions)

Figure 84. Japan Oligonucleotide Purification Consumables Revenue Growth 2021-2026 (\$ millions)

Figure 85. South Korea Oligonucleotide Purification Consumables Revenue Growth 2021-2026 (\$ millions)

Figure 86. Southeast Asia Oligonucleotide Purification Consumables Revenue Growth 2021-2026 (\$ millions)

Figure 87. India Oligonucleotide Purification Consumables Revenue Growth 2021-2026 (\$ millions)

Figure 88. Australia Oligonucleotide Purification Consumables Revenue Growth 2021-2026 (\$ millions)

Figure 89. China Taiwan Oligonucleotide Purification Consumables Revenue Growth 2021-2026 (\$ millions)

Figure 90. Europe Oligonucleotide Purification Consumables Sales Market Share by Country in 2025

Figure 91. Europe Oligonucleotide Purification Consumables Revenue Market Share by Country (2021-2026)

Figure 92. Europe Oligonucleotide Purification Consumables Sales Market Share by Type (2021-2026)

Figure 93. Europe Oligonucleotide Purification Consumables Sales Market Share by Application (2021-2026)

Figure 94. Germany Oligonucleotide Purification Consumables Revenue Growth 2021-2026 (\$ millions)

Figure 95. France Oligonucleotide Purification Consumables Revenue Growth 2021-2026 (\$ millions)

Figure 96. UK Oligonucleotide Purification Consumables Revenue Growth 2021-2026 (\$ millions)

Figure 97. Italy Oligonucleotide Purification Consumables Revenue Growth 2021-2026 (\$ millions)

Figure 98. Russia Oligonucleotide Purification Consumables Revenue Growth 2021-2026 (\$ millions)

Figure 99. Middle East & Africa Oligonucleotide Purification Consumables Sales Market Share by Country (2021-2026)

Figure 100. Middle East & Africa Oligonucleotide Purification Consumables Sales Market Share by Type (2021-2026)

Figure 101. Middle East & Africa Oligonucleotide Purification Consumables Sales Market Share by Application (2021-2026)

Figure 102. Egypt Oligonucleotide Purification Consumables Revenue Growth 2021-2026 (\$ millions)

Figure 103. South Africa Oligonucleotide Purification Consumables Revenue Growth 2021-2026 (\$ millions)

Figure 104. Israel Oligonucleotide Purification Consumables Revenue Growth 2021-2026 (\$ millions)

Figure 105. Turkey Oligonucleotide Purification Consumables Revenue Growth 2021-2026 (\$ millions)

Figure 106. GCC Countries Oligonucleotide Purification Consumables Revenue Growth 2021-2026 (\$ millions)

Figure 107. Manufacturing Cost Structure Analysis of Oligonucleotide Purification Consumables in 2026

Figure 108. Manufacturing Process Analysis of Oligonucleotide Purification Consumables

Figure 109. Industry Chain Structure of Oligonucleotide Purification Consumables

Figure 110. Channels of Distribution

Figure 111. Global Oligonucleotide Purification Consumables Sales Market Forecast by Region (2027-2032)

Figure 112. Global Oligonucleotide Purification Consumables Revenue Market Share Forecast by Region (2027-2032)

Figure 113. Global Oligonucleotide Purification Consumables Sales Market Share Forecast by Type (2027-2032)

Figure 114. Global Oligonucleotide Purification Consumables Revenue Market Share

Forecast by Type (2027-2032)

Figure 115. Global Oligonucleotide Purification Consumables Sales Market Share

Forecast by Application (2027-2032)

Figure 116. Global Oligonucleotide Purification Consumables Revenue Market Share

Forecast by Application (2027-2032)

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