

Global Oligonucleotide Purification Media Market Growth 2026-2032

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Abstracts

The global Oligonucleotide Purification Media market size is predicted to grow from US\$ 122 million in 2025 to US\$ 359 million in 2032; it is expected to grow at a CAGR of 16.6% from 2026 to 2032.

Oligonucleotide purification media are chromatographic stationary phases based on agarose, polymer beads, silica, or hybrid silica microspheres. These media are functionalized with quaternary ammonium (Q), DEAE, C18, hydrophobic interaction ligands, or mixed-mode chemistries to enable separation and purification of synthetic oligonucleotides such as DNA/RNA fragments, ASOs (antisense oligonucleotides), siRNA, and aptamers. They are used to remove truncated sequences, salts, protecting group residues, and related synthesis impurities. Key process modes include DMT-off anion exchange, DMT-on reversed-phase or hydrophobic purification, desalting, process scale-up purification, and quality control analytics. The estimated gross margin is approximately 60%.

Oligonucleotide purification media represent a high-barrier sub-segment within chromatography materials. Although the market size is smaller than Protein A resins and general ion-exchange media, it imposes significantly higher requirements on resolution, alkali stability, batch-to-batch consistency, process scalability under pressure constraints, and regulatory documentation. As small nucleic acid therapeutics transition from clinical development to commercial production, purification workflows are evolving from laboratory-scale methods toward scalable low-pressure chromatography, preparative liquid chromatography, and even continuous processing systems. This transition is driving the shift of specialized media from method-development consumables to critical manufacturing materials.

Demand is primarily driven by ASOs, siRNA, RNA fragments, aptamers, and diagnostic oligonucleotides. Customers evaluate these media not only based on particle size and cost, but more importantly on separation efficiency between target sequences and N-1/N+1 impurities, compatibility with DMT-on or DMT-off workflows, cleaning and regeneration stability, solvent compatibility, and yield after scale-up. As a result, strong anion-exchange, polymer-based reversed-phase, hydrophobic interaction, and mixed-mode media all coexist, as no single platform can cover all sequence lengths and chemical modifications.

The competitive landscape remains dominated by global chromatography and life science tool companies. Domestic manufacturers are gradually entering through monodisperse polymer microspheres, ion-exchange platforms, and integrated workflow solutions. In the short term, international suppliers maintain advantages in commercial manufacturing projects and validated regulatory documentation. In the long term, domestic players that can demonstrate kilogram-scale batch production, DMT workflow compatibility, salt-form conversion stability, and customer-validated manufacturing case studies may increase penetration in development and pilot-scale production segments.

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

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

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

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

Segmentation by Type:

Strong Anion Exchange Media

Weak Anion Exchange Media

Reversed-Phase Media

Hydrophobic Interaction Media

Mixed-Mode Media

Size Exclusion Media

Segmentation by Base Matrix:

Agarose-Based Media

Polymer-Based Media

Silica and Hybrid Silica-Based Media

Dextran-Based Media

Other Base Matrix Media

Segmentation by Particle Size Range:

Sub-10 μ m Media

10-40 µm Media

40-90 µm Media

Above 90 µm Media

Segmentation by Ligand and Surface Chemistry:

Quaternary Amine Ligand Media

Tertiary Amine and DEAE Ligand Media

Hydrophobic Polymer Media

C18 Bonded Media

Multimodal Ligand Media

Unfunctionalized Desalting Media

Segmentation by Application:

Therapeutic Oligonucleotide Manufacturing

Diagnostic and Research Oligo Purification

Process Development and Scale-Up

Impurity Removal and Polishing

Desalting and Buffer Exchange

Quality Control and Analytical Fractionation

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.

Cytiva

DuPont

Bio-Rad

Bio-Works

YMC

Tosoh Bioscience

Agilent

Thermo Fisher Scientific

Waters

NanoMicro

Bestchrom

Smart Lifesciences

Key Questions Addressed in this Report

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

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

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

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

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

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