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Global Oligonucleotide Synthesis Reagents Market Growth 2026-2032

https://marketpublishers.com/r/GC4344084E8AEN.html
Date: October 2026
Pages: 125
Price: US$ 3,660.00 (Single User License)
ID: GC4344084E8AEN

Abstracts

The global Oligonucleotide Synthesis Reagents market size is predicted to grow from US$ 936 million in 2025 to US$ 1983 million in 2032; it is expected to grow at a CAGR of 11.3% from 2026 to 2032.

Oligonucleotide synthesis reagents are specialized chemical reagents and functional materials used in the stepwise chemical synthesis of DNA, RNA, and chemically modified oligonucleotides. The market is centered on solid-phase phosphoramidite chemistry, in which phosphoramidites serve as nucleotide building blocks and are used together with activators, capping reagents, oxidation reagents, sulfurizing reagents, deblocking reagents, and synthesis-grade solvents. Commercial products range from research-grade materials to production-grade and GMP-grade reagents designed for scale-up and therapeutic manufacturing. Key applications include research oligonucleotides, molecular diagnostics and genomics, therapeutic oligonucleotide manufacturing, and gene-editing or synthetic-biology workflows. The market is increasingly shaped by requirements for modified phosphoramidites, tighter impurity control, low-water solvent systems, scalable manufacturing, and consistent quality across clinical and commercial production. Thermo Fisher Scientific notes that phosphoramidites can be manufactured from gram scale to metric-ton scale, illustrating the transition of oligonucleotide chemistry from laboratory synthesis toward industrial-scale production.

Key FindingsThe global oligonucleotide synthesis reagents industry had an estimated gross margin of approximately 40%–50% in 2025.Phosphoramidites are the largest product category.Therapeutic oligonucleotide manufacturing is the fastest-growing high-value application.North America and Europe are major supply regions for high-specification products, while China continues to strengthen its large-scale supply

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capabilities.

Market Trends

The market is shifting from standard DNA and RNA synthesis reagents toward higher-value modified phosphoramidites and more tightly controlled production-grade and GMP-grade materials. Demand is increasing for 2'-modified chemistries, specialty linkers, functional modifiers, sulfurization systems, and customized reagent blends that support therapeutic oligonucleotide development and commercial manufacturing.

A second major trend is the transition from laboratory-scale reagent supply toward industrial-scale manufacturing systems. Large-volume customers increasingly require tighter control of moisture, impurities, lot-to-lot consistency, documentation, packaging, and supply continuity. Thermo Fisher identifies extra-dry solvents, deblocking agents, CAP A and CAP B, activators, oxidizers, and phosphoramidites as core chemicals in the oligonucleotide synthesis cycle, highlighting the increasingly integrated nature of reagent procurement.

Market Dynamics

Drivers

The principal growth driver is the expansion of therapeutic oligonucleotide pipelines and commercial manufacturing. Greater use of antisense oligonucleotides, siRNA, CRISPR guide RNA, and other modified nucleic-acid therapeutics directly increases consumption of phosphoramidites and cycle reagents. Agilent is expanding oligonucleotide manufacturing capacity in Colorado through a US$725 million investment, with two additional manufacturing trains scheduled for completion in 2027, reinforcing expectations for continued growth in industrial-scale oligonucleotide production.

Restraints

The market remains constrained by demanding purity specifications, moisture sensitivity, complex impurity profiles, qualification requirements, and the high cost of specialty modified phosphoramidites. Scaling from research-grade to GMP-grade production also requires substantial investment in analytical control, quality systems, solvent handling, packaging, and supply-chain qualification.

Opportunities

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The strongest opportunity lies in GMP-grade and highly modified reagents for therapeutic applications. Suppliers capable of providing customized phosphoramidites, advanced modifiers, sulfurization chemistries, high-purity ancillary reagents, and manufacturing support from early development through commercial scale are positioned in the highest-value portion of the market.

Demand is also broadening beyond conventional antisense and siRNA products toward lipid-conjugated oligonucleotides and other next-generation delivery architectures. Agilent and Singapore's Nucleic Acid Therapeutics Initiative announced a 2026 collaboration focused on lipid-conjugated oligonucleotides, illustrating continued innovation in chemical modification and extrahepatic delivery.

Challenges

A major challenge is maintaining high coupling efficiency and impurity control as oligonucleotide length and chemical complexity increase. Solid-phase synthesis requires repeated detritylation, coupling, oxidation or sulfurization, and capping cycles, meaning small losses in individual reaction efficiency can accumulate across longer sequences.

The industry also faces potential long-term technology substitution. Chemical phosphoramidite synthesis remains the dominant commercial route, but chemoenzymatic and enzymatic approaches are developing as alternatives for selected long and complex RNA products. These technologies are more likely to complement than broadly replace phosphoramidite chemistry in the near term.

Industry Chain Analysis

The upstream chain consists of protected nucleosides, phosphorus chemistry intermediates, specialty organic chemicals, solvents, protecting groups, and functional modifiers. Midstream suppliers convert these materials into phosphoramidites and ancillary synthesis reagents under increasingly strict purity and quality-control requirements. Downstream customers include oligonucleotide manufacturers and CDMOs, pharmaceutical and biotechnology companies, diagnostics and genomics companies, and academic or research institutions.

The value chain is progressively moving toward higher-specification products. Standard solvents and basic cycle reagents generally have lower differentiation, whereas modified phosphoramidites, custom chemistries, GMP-grade materials, and reagents

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requiring sophisticated analytical control command substantially greater technical value.

Segment Insights

By reagent category, phosphoramidites represent the core value pool, followed by activators, capping reagents, oxidation reagents, sulfurizing reagents, deblocking reagents, and synthesis-grade solvents. Within phosphoramidites, standard DNA and RNA materials form the established base, while 2'-modified, conformationally constrained, and functional modification products constitute the higher-value growth segments.

By application, therapeutic oligonucleotide manufacturing is gaining importance faster than research applications. Maravai reports that oligonucleotide-related products support therapeutics, in vitro diagnostics, NGS, and CRISPR-based gene editing, demonstrating the broadening downstream application base for synthesis inputs.

Downstream Market Opportunities

Therapeutic oligonucleotide developers and CDMOs represent the most attractive downstream opportunity because their reagent demand scales with clinical advancement and commercial production volumes. These customers also place greater emphasis on GMP compliance, impurity characterization, change control, traceability, and long-term supply assurance.

Molecular diagnostics, genomics, and gene editing remain strategically important secondary opportunities. These applications support continuous demand for specialty labels, linkers, modified bases, probes, primers, and guide RNA-related synthesis chemistry, providing a diversified demand base beyond pharmaceutical manufacturing.

Regional Insights

North America remains an important high-value demand and supply region, supported by therapeutic oligonucleotide development, CDMO capacity, specialty reagent production, diagnostics, genomics, and gene-editing research. Ongoing investment in commercial-scale oligonucleotide manufacturing is reinforcing the region’s demand for GMP-grade phosphoramidites and ancillary reagents.

Europe retains strong capabilities in specialty chemistry and high-purity reagent manufacturing. China is increasing its role in global supply through large-scale

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phosphoramidite production and broader nucleic-acid raw-material portfolios. Hongene has disclosed phosphoramidite production capacity exceeding 58 tons per year and supplies customers across more than 40 countries and regions, illustrating the increasing global relevance of Chinese manufacturing capacity.

Competitive Landscape Analysis

The competitive landscape is characterized by a relatively concentrated group of large-scale and specialist suppliers, supplemented by smaller companies focused on highly modified phosphoramidites or ancillary reagents. North American and European suppliers generally hold advantages in specialty chemistry, high-value modifications, technical support, and established life-science customer networks, while Asian suppliers are strengthening their positions through capacity expansion, manufacturing scale, and increasingly broad product portfolios.

Competition is gradually shifting from simple catalog breadth toward manufacturing scalability, GMP readiness, impurity control, customization capability, and security of supply. As therapeutic applications account for a larger share of incremental demand, suppliers capable of supporting customers from research quantities through clinical and commercial-scale production are likely to strengthen their competitive positions.

Report Scope

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

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

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

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

Market Segmentation

Segmentation by Type:

Activators

Capping Reagents

Oxidation Reagents

Sulfurizing Reagents

Deblocking Reagents

Others

Segmentation by Phosphoramidite Type:

Standard DNA Phosphoramidites

Standard RNA Phosphoramidites

2'-Modified Phosphoramidites

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Conformationally Constrained Phosphoramidites

Functional Modifier and Labeling Phosphoramidites

Others

Segmentation by Grade:

Research Grade

Production Grade

GMP Grade

Others

Segmentation by Application:

Research Oligonucleotide Synthesis

Molecular Diagnostics and Genomics

Therapeutic Oligonucleotide Manufacturing

Gene Editing and Synthetic Biology

Others

This report also splits the market by region:

Americas

United States

Canada

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- Mexico
- Brazil

APAC

- China
- Japan
- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel

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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.

Thermo Fisher Scientific Inc.

Maravai LifeSciences Holdings Inc.

Hongene Biotech Corporation

Tokyo Chemical Industry Co., Ltd.

ChemGenes Corporation

emp BIOTECH GmbH

PolyOrg Inc.

Lumiprobe Corporation

Suzhou GenePoly Co., Ltd.

Concord Technology Tianjin Co., Ltd.

Solstice Advanced Materials Inc.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Oligonucleotide Synthesis Reagents market?

What factors are driving Oligonucleotide Synthesis Reagents market growth,

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globally and by region?

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

How do Oligonucleotide Synthesis Reagents market opportunities vary by end market size?

How does Oligonucleotide Synthesis Reagents break out by Type, by Application?

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