

Global Oligonucleotide Synthesis Solid Support Market Growth 2026-2032

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Abstracts

The global Oligonucleotide Synthesis Solid Support market size is predicted to grow from US\$ 242 million in 2025 to US\$ 594 million in 2032; it is expected to grow at a CAGR of 13.6% from 2026 to 2032.

Oligonucleotide synthesis solid supports are functional solid-phase materials used to immobilize the initial nucleoside or linker and enable stepwise chain elongation during the chemical synthesis of DNA, RNA and chemically modified oligonucleotides. The market primarily covers controlled pore glass (CPG), polystyrene-based supports, other specialized polymer supports, nucleoside-loaded supports and universal supports used in phosphoramidite solid-phase synthesis. Key technical parameters include support matrix, pore structure, particle size, loading capacity, mechanical stability, solvent compatibility and linker or nucleoside functionalization. CPG remains an established platform with broad use in research and specialized oligonucleotide synthesis, while highly cross-linked polystyrene and PS-DVB supports are increasingly important for higher-loading and larger-scale manufacturing. Commercial products serve research oligonucleotides, diagnostic primers and probes, and therapeutic oligonucleotides including antisense oligonucleotides and siRNA. The scope of this study focuses on the solid support material itself and its functionalized or preloaded forms used as the reaction platform in oligonucleotide synthesis.

Key FindingsThe overall gross margin of the oligonucleotide synthesis solid support industry was approximately 35%–45% in 2025. Controlled pore glass and polystyrene-based supports are the two major commercial product types. High-performance PS-DVB supports can reach loading capacities of approximately 350 $\mu\text{mol/g}$ or above. Therapeutic oligonucleotide synthesis is the most important growth application. High-loading polymer supports are increasingly used in clinical and

commercial-scale manufacturing. North America is an important region for high-value research and applications.

Market Trends

The most important technology trend is the shift from conventional low-loading supports toward higher-loading and more process-efficient solid-support architectures. Polymer engineering, controlled pore structure, surface functionalization and optimized linker loading are becoming more important as therapeutic oligonucleotide production moves toward larger batch sizes. High-loading polymer supports can increase synthesis scale per column volume, improve equipment utilization and reduce the support cost associated with each mole of synthesized oligonucleotide. At the same time, CPG suppliers are improving pore architecture, surface chemistry and manufacturing efficiency rather than competing only through traditional pore-size specifications. Next-generation products are increasingly designed around full-length product yield, synthesis consistency and process economics.

A second trend is increasing customization. Commercial customers increasingly require supports loaded with modified nucleosides, proprietary linkers, universal linkers or conjugation-related functional groups. This shifts value creation from the bare support matrix toward integrated material design, functionalization, loading control, quality documentation and scalable manufacturing. As oligonucleotide structures become more complex, customized solid supports are likely to account for a growing share of high-value demand.

Market Dynamics

The market is evolving from a laboratory-reagent model toward a specialized biopharmaceutical raw-material model. Research customers remain important in product diversity, but commercial growth is increasingly determined by therapeutic programs requiring reproducibility across development, clinical and commercial manufacturing stages. This transition raises entry barriers because pharmaceutical customers place greater emphasis on batch consistency, traceability, supply continuity, documentation and scale-up performance.

At the same time, increasing loading capacity creates a mixed effect on market growth. Higher loading supports improve throughput and expand the addressable production scale, but they also reduce the quantity of support required per mole of oligonucleotide. Market revenue therefore depends not only on downstream oligonucleotide volume

growth but also on product mix, functionalization complexity, loading efficiency and commercial procurement pricing.

Drivers

The primary demand driver is the continued expansion of therapeutic oligonucleotide development and commercial manufacturing. ASO and siRNA programs increasingly require multi-kilogram API production, which increases demand for reliable, scalable solid supports. The wider adoption of modified RNA, GalNAc-conjugated molecules and other advanced oligonucleotide structures further increases the need for customized nucleoside-loaded and linker-loaded supports.

Manufacturing economics are another major driver. Higher-loading materials allow more oligonucleotide to be synthesized within the same reactor or column volume, supporting higher throughput and lower capital intensity. Industrial polymer supports with DNA loading around 350–400 $\mu\text{mol/g}$ and specialized platforms exceeding conventional CPG loading have therefore become strategically important for large-scale production.

Restraints

The market remains constrained by demanding qualification requirements and relatively concentrated demand. Solid supports used in therapeutic oligonucleotide manufacturing must maintain consistent particle characteristics, loading, pore structure and functionalization across batches. Switching suppliers can require process revalidation, limiting rapid supplier substitution once a material has been incorporated into a clinical or commercial process.

Improving synthesis efficiency also limits volume growth. As higher-loading supports, optimized synthesis cycles and improved process control reduce material consumption per unit of oligonucleotide output, solid-support demand does not necessarily increase at the same rate as downstream API production.

Opportunities

The largest opportunity lies in high-loading polymeric supports for commercial-scale therapeutic oligonucleotide synthesis. Suppliers capable of combining polymer synthesis, pore engineering, surface functionalization, customized linker loading and pharmaceutical-grade quality systems have the greatest potential to capture higher-value applications.

Localization represents another important opportunity. Chinese manufacturers are moving from laboratory-scale material development toward commercial supply. NanoMicro has disclosed that its nucleic acid solid-phase synthesis supports have entered sales, while Sunresin is expanding a life-science materials platform that includes small-nucleic-acid and solid-phase synthesis supports. This supports the emergence of a more diversified global supply base and creates opportunities for import substitution in Asia.

Challenges

The principal challenge is maintaining synthesis performance as loading capacity increases. Excessively high loading can create diffusion limitations, steric effects and incomplete coupling, particularly for longer or highly modified oligonucleotides. Product development therefore requires balancing loading density with full-length product purity, yield and pressure-drop performance rather than maximizing loading alone.

Another challenge is technology substitution over the longer term. Enzymatic synthesis, liquid-phase approaches, convergent assembly and fragment-based manufacturing may reduce dependence on conventional one-chain-one-support solid-phase synthesis in selected applications. These technologies are not expected to displace established solid-phase synthesis rapidly, but they could gradually alter support requirements and favor new material architectures.

Industry Chain Analysis

The upstream industry includes porous glass, styrenic monomers, cross-linking agents, specialty polymers, silane chemistry, linkers, nucleosides and other functionalization reagents. The midstream segment consists of support-particle synthesis, pore engineering, surface modification, linker attachment, nucleoside loading, quality control and packaging. Downstream customers include oligonucleotide manufacturers, CDMOs, pharmaceutical and biotechnology companies, diagnostic companies and research institutions.

The highest technical barriers are concentrated in particle design, controlled porosity, reproducible functionalization and nucleoside or linker loading. For therapeutic-grade applications, supply reliability and quality documentation increasingly become part of the product rather than separate service features.

Value Chain Analysis

Value creation increases as the product moves from bare support particles toward functionalized and customer-specific loaded supports. Native CPG or unfunctionalized polymer beads represent the basic material layer, while amino-functionalized supports, linker-modified supports, universal supports and nucleoside-loaded products command higher value because they incorporate additional chemistry, process control and customer-specific requirements.

For commercial therapeutic applications, value also shifts toward manufacturing consistency and regulatory support. Suppliers with integrated capabilities from base-particle synthesis through functionalization, analytical testing and custom loading can capture a larger portion of the value chain and establish deeper customer relationships than suppliers focused only on generic support materials.

Segment Insights

By support matrix, controlled pore glass remains an established commercial platform, particularly in research, diagnostics and applications requiring well-characterized pore structures. Polystyrene-based supports are increasingly important in therapeutic and larger-scale manufacturing because their higher loading capacity and mechanical properties can improve production efficiency. NanoMicro indicates typical CPG loading of approximately 50–150 $\mu\text{mol/g}$ compared with PS-DVB loading generally reaching around 350 $\mu\text{mol/g}$ or above.

By application, therapeutic oligonucleotide synthesis represents the principal growth segment, while research oligonucleotide synthesis continues to provide a broad and stable demand base. Diagnostic oligonucleotides remain an important specialized application, particularly for primers, probes and modified sequences.

Downstream Market Opportunities

Therapeutic oligonucleotides offer the strongest downstream opportunity. Expansion of ASO, siRNA and other RNA-based therapeutic programs increases demand not only for higher volumes of solid supports but also for higher-loading, sequence-compatible and chemically customized products. Clinical-to-commercial scale-up creates particularly attractive opportunities because supplier qualification and process integration increase switching costs.

Diagnostic and research applications provide a different opportunity profile. These markets are more fragmented and generally use smaller batch sizes, but they require a

wider variety of nucleoside-loaded, universal and specialty modifier supports. Suppliers with broad SKU portfolios and flexible small-batch functionalization capabilities can maintain strong positions in these segments.

Regional Insights

North America remains a major center for high-value solid-support development, therapeutic oligonucleotide manufacturing and commercial-scale applications. The region benefits from an established oligonucleotide CDMO and biotechnology ecosystem and continues to invest in dedicated solid-support manufacturing capacity. Recent expansion of specialized polymer-support manufacturing in the United States reflects increasing demand from clinical and commercial oligonucleotide programs.

Europe maintains a strong position in CPG technology, specialty chemical supply and pharmaceutical manufacturing. China is emerging as the most important localization and new-supplier development region. Domestic companies are commercializing PS-DVB supports, developing small-nucleic-acid support materials and expanding life-science material production capacity, although qualification by multinational pharmaceutical customers remains an important stage in market penetration.

Competitive Landscape Analysis

The competitive structure remains relatively concentrated at the high-value end because commercial therapeutic applications require more than basic particle manufacturing. North America and Europe retain advantages in established customer qualifications, proprietary support chemistries, custom loading and commercial-scale manufacturing experience. Japan also maintains an important position through advanced polymer-material technologies and high-loading solid-support platforms.

China is increasingly competitive in PS-DVB particle preparation, pore engineering and localization of solid-support supply. Regional competition is therefore shifting from a simple imported-versus-domestic structure toward competition based on loading capacity, full-length product yield, customized functionalization, manufacturing consistency and supply security. The competitive gap is likely to narrow first in standard and semi-custom products, while high-value commercial therapeutic programs will continue to favor suppliers with extensive validation history and integrated quality systems.

Report Scope

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

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

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

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

Market Segmentation

Segmentation by Type:

Controlled Pore Glass (CPG)

Polystyrene-based Support

Other Polymer-based Support

Others

Segmentation by Functionalization Type:

Native Support

Amino-functionalized Support

Nucleoside-loaded Support

Universal Support

Specialty Modifier-loaded Support

Others

Segmentation by Application:

Oligonucleotide Manufacturers and CDMOs

Pharmaceutical and Biotechnology Companies

Diagnostic Companies

Academic and Research Institutions

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.

Nitto Denko Corporation

LGC Limited

Sunresin New Materials Co., Ltd.

Suzhou NanoMicro Technology Co., Ltd.

FUJIFILM Holdings Corporation

ChemGenes Corporation

Glen Research Corporation

Merck KGaA

Tianjin Nankai Hecheng Science & Technology Co., Ltd.

Hongene Biotech Corporation

PoreSyn Solutions

Thermo Fisher Scientific Inc.

Key Questions Addressed in this Report

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

What factors are driving Oligonucleotide Synthesis Solid Support market growth, globally and by region?

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

How do Oligonucleotide Synthesis Solid Support market opportunities vary by end market size?

How does Oligonucleotide Synthesis Solid Support 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 Synthesis Solid Support Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Oligonucleotide Synthesis Solid Support by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Oligonucleotide Synthesis Solid Support by Country/Region, 2021, 2025 & 2032

2.2 Oligonucleotide Synthesis Solid Support Segment by Type

- 2.2.1 Controlled Pore Glass (CPG)
- 2.2.2 Polystyrene-based Support
- 2.2.3 Other Polymer-based Support
- 2.2.4 Others
- 2.2.5 Oligonucleotide Synthesis Solid Support Sales by Type
 - 2.2.5.1 Global Oligonucleotide Synthesis Solid Support Sales Market Share by Type (2021-2026)
 - 2.2.5.2 Global Oligonucleotide Synthesis Solid Support Revenue and Market Share by Type (2021-2026)
 - 2.2.5.3 Global Oligonucleotide Synthesis Solid Support Sale Price by Type (2021-2026)

2.3 Oligonucleotide Synthesis Solid Support Segment by Functionalization Type

- 2.3.1 Native Support
- 2.3.2 Amino-functionalized Support
- 2.3.3 Nucleoside-loaded Support
- 2.3.4 Universal Support
- 2.3.5 Specialty Modifier-loaded Support

2.3.6 Others

2.3.7 Oligonucleotide Synthesis Solid Support Sales by Functionalization Type

2.3.7.1 Global Oligonucleotide Synthesis Solid Support Sales Market Share by Functionalization Type (2021-2026)

2.3.7.2 Global Oligonucleotide Synthesis Solid Support Revenue and Market Share by Functionalization Type (2021-2026)

2.3.7.3 Global Oligonucleotide Synthesis Solid Support Sale Price by Functionalization Type (2021-2026)

2.4 Oligonucleotide Synthesis Solid Support Segment by Application

2.4.1 Oligonucleotide Manufacturers and CDMOs

2.4.2 Pharmaceutical and Biotechnology Companies

2.4.3 Diagnostic Companies

2.4.4 Academic and Research Institutions

2.4.5 Others

2.4.6 Oligonucleotide Synthesis Solid Support Sales by Application

2.4.6.1 Global Oligonucleotide Synthesis Solid Support Sale Market Share by Application (2021-2026)

2.4.6.2 Global Oligonucleotide Synthesis Solid Support Revenue and Market Share by Application (2021-2026)

2.4.6.3 Global Oligonucleotide Synthesis Solid Support Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Oligonucleotide Synthesis Solid Support Breakdown Data by Company

3.1.1 Global Oligonucleotide Synthesis Solid Support Annual Sales by Company (2021-2026)

3.1.2 Global Oligonucleotide Synthesis Solid Support Sales Market Share by Company (2021-2026)

3.2 Global Oligonucleotide Synthesis Solid Support Annual Revenue by Company (2021-2026)

3.2.1 Global Oligonucleotide Synthesis Solid Support Revenue by Company (2021-2026)

3.2.2 Global Oligonucleotide Synthesis Solid Support Revenue Market Share by Company (2021-2026)

3.3 Global Oligonucleotide Synthesis Solid Support Sale Price by Company

3.4 Key Manufacturers Oligonucleotide Synthesis Solid Support Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Oligonucleotide Synthesis Solid Support Product Location

Distribution

3.4.2 Players Oligonucleotide Synthesis Solid Support 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 SYNTHESIS SOLID SUPPORT BY GEOGRAPHIC REGION

4.1 World Historic Oligonucleotide Synthesis Solid Support Market Size by Geographic Region (2021-2026)

4.1.1 Global Oligonucleotide Synthesis Solid Support Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Oligonucleotide Synthesis Solid Support Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Oligonucleotide Synthesis Solid Support Market Size by Country/Region (2021-2026)

4.2.1 Global Oligonucleotide Synthesis Solid Support Annual Sales by Country/Region (2021-2026)

4.2.2 Global Oligonucleotide Synthesis Solid Support Annual Revenue by Country/Region (2021-2026)

4.3 Americas Oligonucleotide Synthesis Solid Support Sales Growth

4.4 APAC Oligonucleotide Synthesis Solid Support Sales Growth

4.5 Europe Oligonucleotide Synthesis Solid Support Sales Growth

4.6 Middle East & Africa Oligonucleotide Synthesis Solid Support Sales Growth

5 AMERICAS

5.1 Americas Oligonucleotide Synthesis Solid Support Sales by Country

5.1.1 Americas Oligonucleotide Synthesis Solid Support Sales by Country (2021-2026)

5.1.2 Americas Oligonucleotide Synthesis Solid Support Revenue by Country (2021-2026)

5.2 Americas Oligonucleotide Synthesis Solid Support Sales by Type (2021-2026)

5.3 Americas Oligonucleotide Synthesis Solid Support Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Oligonucleotide Synthesis Solid Support Sales by Region

6.1.1 APAC Oligonucleotide Synthesis Solid Support Sales by Region (2021-2026)

6.1.2 APAC Oligonucleotide Synthesis Solid Support Revenue by Region (2021-2026)

6.2 APAC Oligonucleotide Synthesis Solid Support Sales by Type (2021-2026)

6.3 APAC Oligonucleotide Synthesis Solid Support 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 Synthesis Solid Support by Country

7.1.1 Europe Oligonucleotide Synthesis Solid Support Sales by Country (2021-2026)

7.1.2 Europe Oligonucleotide Synthesis Solid Support Revenue by Country (2021-2026)

7.2 Europe Oligonucleotide Synthesis Solid Support Sales by Type (2021-2026)

7.3 Europe Oligonucleotide Synthesis Solid Support 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 Synthesis Solid Support by Country

8.1.1 Middle East & Africa Oligonucleotide Synthesis Solid Support Sales by Country (2021-2026)

8.1.2 Middle East & Africa Oligonucleotide Synthesis Solid Support Revenue by Country (2021-2026)

8.2 Middle East & Africa Oligonucleotide Synthesis Solid Support Sales by Type

(2021-2026)

8.3 Middle East & Africa Oligonucleotide Synthesis Solid Support 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 Synthesis Solid Support

10.3 Manufacturing Process Analysis of Oligonucleotide Synthesis Solid Support

10.4 Industry Chain Structure of Oligonucleotide Synthesis Solid Support

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Oligonucleotide Synthesis Solid Support Distributors

11.3 Oligonucleotide Synthesis Solid Support Customer

12 WORLD FORECAST REVIEW FOR OLIGONUCLEOTIDE SYNTHESIS SOLID SUPPORT BY GEOGRAPHIC REGION

12.1 Global Oligonucleotide Synthesis Solid Support Market Size Forecast by Region

12.1.1 Global Oligonucleotide Synthesis Solid Support Forecast by Region

(2027-2032)

12.1.2 Global Oligonucleotide Synthesis Solid Support 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 Synthesis Solid Support Forecast by Type (2027-2032)
- 12.7 Global Oligonucleotide Synthesis Solid Support Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Nitto Denko Corporation

- 13.1.1 Nitto Denko Corporation Company Information
- 13.1.2 Nitto Denko Corporation Oligonucleotide Synthesis Solid Support Product Portfolios and Specifications
- 13.1.3 Nitto Denko Corporation Oligonucleotide Synthesis Solid Support Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.1.4 Nitto Denko Corporation Main Business Overview
- 13.1.5 Nitto Denko Corporation Latest Developments

13.2 LGC Limited

- 13.2.1 LGC Limited Company Information
- 13.2.2 LGC Limited Oligonucleotide Synthesis Solid Support Product Portfolios and Specifications
- 13.2.3 LGC Limited Oligonucleotide Synthesis Solid Support Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.2.4 LGC Limited Main Business Overview
- 13.2.5 LGC Limited Latest Developments

13.3 Sunresin New Materials Co., Ltd.

- 13.3.1 Sunresin New Materials Co., Ltd. Company Information
- 13.3.2 Sunresin New Materials Co., Ltd. Oligonucleotide Synthesis Solid Support Product Portfolios and Specifications
- 13.3.3 Sunresin New Materials Co., Ltd. Oligonucleotide Synthesis Solid Support Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.3.4 Sunresin New Materials Co., Ltd. Main Business Overview
- 13.3.5 Sunresin New Materials Co., Ltd. Latest Developments

13.4 Suzhou NanoMicro Technology Co., Ltd.

- 13.4.1 Suzhou NanoMicro Technology Co., Ltd. Company Information
- 13.4.2 Suzhou NanoMicro Technology Co., Ltd. Oligonucleotide Synthesis Solid Support Product Portfolios and Specifications
- 13.4.3 Suzhou NanoMicro Technology Co., Ltd. Oligonucleotide Synthesis Solid Support Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.4.4 Suzhou NanoMicro Technology Co., Ltd. Main Business Overview
- 13.4.5 Suzhou NanoMicro Technology Co., Ltd. Latest Developments
- 13.5 FUJIFILM Holdings Corporation
 - 13.5.1 FUJIFILM Holdings Corporation Company Information
 - 13.5.2 FUJIFILM Holdings Corporation Oligonucleotide Synthesis Solid Support Product Portfolios and Specifications
 - 13.5.3 FUJIFILM Holdings Corporation Oligonucleotide Synthesis Solid Support Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.5.4 FUJIFILM Holdings Corporation Main Business Overview
 - 13.5.5 FUJIFILM Holdings Corporation Latest Developments
- 13.6 ChemGenes Corporation
 - 13.6.1 ChemGenes Corporation Company Information
 - 13.6.2 ChemGenes Corporation Oligonucleotide Synthesis Solid Support Product Portfolios and Specifications
 - 13.6.3 ChemGenes Corporation Oligonucleotide Synthesis Solid Support Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.6.4 ChemGenes Corporation Main Business Overview
 - 13.6.5 ChemGenes Corporation Latest Developments
- 13.7 Glen Research Corporation
 - 13.7.1 Glen Research Corporation Company Information
 - 13.7.2 Glen Research Corporation Oligonucleotide Synthesis Solid Support Product Portfolios and Specifications
 - 13.7.3 Glen Research Corporation Oligonucleotide Synthesis Solid Support Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.7.4 Glen Research Corporation Main Business Overview
 - 13.7.5 Glen Research Corporation Latest Developments
- 13.8 Merck KGaA
 - 13.8.1 Merck KGaA Company Information
 - 13.8.2 Merck KGaA Oligonucleotide Synthesis Solid Support Product Portfolios and Specifications
 - 13.8.3 Merck KGaA Oligonucleotide Synthesis Solid Support Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.8.4 Merck KGaA Main Business Overview
 - 13.8.5 Merck KGaA Latest Developments
- 13.9 Tianjin Nankai Hecheng Science & Technology Co., Ltd.
 - 13.9.1 Tianjin Nankai Hecheng Science & Technology Co., Ltd. Company Information
 - 13.9.2 Tianjin Nankai Hecheng Science & Technology Co., Ltd. Oligonucleotide Synthesis Solid Support Product Portfolios and Specifications
 - 13.9.3 Tianjin Nankai Hecheng Science & Technology Co., Ltd. Oligonucleotide

Synthesis Solid Support Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 Tianjin Nankai Hecheng Science & Technology Co., Ltd. Main Business

Overview

13.9.5 Tianjin Nankai Hecheng Science & Technology Co., Ltd. Latest Developments

13.10 Hongene Biotech Corporation

13.10.1 Hongene Biotech Corporation Company Information

13.10.2 Hongene Biotech Corporation Oligonucleotide Synthesis Solid Support

Product Portfolios and Specifications

13.10.3 Hongene Biotech Corporation Oligonucleotide Synthesis Solid Support Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 Hongene Biotech Corporation Main Business Overview

13.10.5 Hongene Biotech Corporation Latest Developments

13.11 PoreSyn Solutions

13.11.1 PoreSyn Solutions Company Information

13.11.2 PoreSyn Solutions Oligonucleotide Synthesis Solid Support Product Portfolios and Specifications

13.11.3 PoreSyn Solutions Oligonucleotide Synthesis Solid Support Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 PoreSyn Solutions Main Business Overview

13.11.5 PoreSyn Solutions Latest Developments

13.12 Thermo Fisher Scientific Inc.

13.12.1 Thermo Fisher Scientific Inc. Company Information

13.12.2 Thermo Fisher Scientific Inc. Oligonucleotide Synthesis Solid Support Product Portfolios and Specifications

13.12.3 Thermo Fisher Scientific Inc. Oligonucleotide Synthesis Solid Support Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 Thermo Fisher Scientific Inc. Main Business Overview

13.12.5 Thermo Fisher Scientific Inc. Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Oligonucleotide Synthesis Solid Support Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Oligonucleotide Synthesis Solid Support Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Controlled Pore Glass (CPG)

Table 4. Major Players of Polystyrene-based Support

Table 5. Major Players of Other Polymer-based Support

Table 6. Major Players of Others

Table 7. Global Oligonucleotide Synthesis Solid Support Sales by Type (2021-2026) & (Tons)

Table 8. Global Oligonucleotide Synthesis Solid Support Sales Market Share by Type (2021-2026)

Table 9. Global Oligonucleotide Synthesis Solid Support Revenue by Type (2021-2026) & (\$ million)

Table 10. Global Oligonucleotide Synthesis Solid Support Revenue Market Share by Type (2021-2026)

Table 11. Global Oligonucleotide Synthesis Solid Support Sale Price by Type (2021-2026) & (US\$/kg)

Table 12. Major Players of Native Support

Table 13. Major Players of Amino-functionalized Support

Table 14. Major Players of Nucleoside-loaded Support

Table 15. Major Players of Universal Support

Table 16. Major Players of Specialty Modifier-loaded Support

Table 17. Major Players of Others

Table 18. Global Oligonucleotide Synthesis Solid Support Sales by Functionalization Type (2021-2026) & (Tons)

Table 19. Global Oligonucleotide Synthesis Solid Support Sales Market Share by Functionalization Type (2021-2026)

Table 20. Global Oligonucleotide Synthesis Solid Support Revenue by Functionalization Type (2021-2026) & (\$ million)

Table 21. Global Oligonucleotide Synthesis Solid Support Revenue Market Share by Functionalization Type (2021-2026)

Table 22. Global Oligonucleotide Synthesis Solid Support Sale Price by Functionalization Type (2021-2026) & (US\$/kg)

Table 23. Global Oligonucleotide Synthesis Solid Support Sale by Application

(2021-2026) & (Tons)

Table 24. Global Oligonucleotide Synthesis Solid Support Sale Market Share by Application (2021-2026)

Table 25. Global Oligonucleotide Synthesis Solid Support Revenue by Application (2021-2026) & (\$ million)

Table 26. Global Oligonucleotide Synthesis Solid Support Revenue Market Share by Application (2021-2026)

Table 27. Global Oligonucleotide Synthesis Solid Support Sale Price by Application (2021-2026) & (US\$/kg)

Table 28. Global Oligonucleotide Synthesis Solid Support Sales by Company (2021-2026) & (Tons)

Table 29. Global Oligonucleotide Synthesis Solid Support Sales Market Share by Company (2021-2026)

Table 30. Global Oligonucleotide Synthesis Solid Support Revenue by Company (2021-2026) & (\$ millions)

Table 31. Global Oligonucleotide Synthesis Solid Support Revenue Market Share by Company (2021-2026)

Table 32. Global Oligonucleotide Synthesis Solid Support Sale Price by Company (2021-2026) & (US\$/kg)

Table 33. Key Manufacturers Oligonucleotide Synthesis Solid Support Producing Area Distribution and Sales Area

Table 34. Players Oligonucleotide Synthesis Solid Support Products Offered

Table 35. Oligonucleotide Synthesis Solid Support Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 36. New Products and Potential Entrants

Table 37. Market M&A Activity & Strategy

Table 38. Global Oligonucleotide Synthesis Solid Support Sales by Geographic Region (2021-2026) & (Tons)

Table 39. Global Oligonucleotide Synthesis Solid Support Sales Market Share Geographic Region (2021-2026)

Table 40. Global Oligonucleotide Synthesis Solid Support Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 41. Global Oligonucleotide Synthesis Solid Support Revenue Market Share by Geographic Region (2021-2026)

Table 42. Global Oligonucleotide Synthesis Solid Support Sales by Country/Region (2021-2026) & (Tons)

Table 43. Global Oligonucleotide Synthesis Solid Support Sales Market Share by Country/Region (2021-2026)

Table 44. Global Oligonucleotide Synthesis Solid Support Revenue by Country/Region

(2021-2026) & (\$ millions)

Table 45. Global Oligonucleotide Synthesis Solid Support Revenue Market Share by Country/Region (2021-2026)

Table 46. Americas Oligonucleotide Synthesis Solid Support Sales by Country (2021-2026) & (Tons)

Table 47. Americas Oligonucleotide Synthesis Solid Support Sales Market Share by Country (2021-2026)

Table 48. Americas Oligonucleotide Synthesis Solid Support Revenue by Country (2021-2026) & (\$ millions)

Table 49. Americas Oligonucleotide Synthesis Solid Support Sales by Type (2021-2026) & (Tons)

Table 50. Americas Oligonucleotide Synthesis Solid Support Sales by Application (2021-2026) & (Tons)

Table 51. APAC Oligonucleotide Synthesis Solid Support Sales by Region (2021-2026) & (Tons)

Table 52. APAC Oligonucleotide Synthesis Solid Support Sales Market Share by Region (2021-2026)

Table 53. APAC Oligonucleotide Synthesis Solid Support Revenue by Region (2021-2026) & (\$ millions)

Table 54. APAC Oligonucleotide Synthesis Solid Support Sales by Type (2021-2026) & (Tons)

Table 55. APAC Oligonucleotide Synthesis Solid Support Sales by Application (2021-2026) & (Tons)

Table 56. Europe Oligonucleotide Synthesis Solid Support Sales by Country (2021-2026) & (Tons)

Table 57. Europe Oligonucleotide Synthesis Solid Support Revenue by Country (2021-2026) & (\$ millions)

Table 58. Europe Oligonucleotide Synthesis Solid Support Sales by Type (2021-2026) & (Tons)

Table 59. Europe Oligonucleotide Synthesis Solid Support Sales by Application (2021-2026) & (Tons)

Table 60. Middle East & Africa Oligonucleotide Synthesis Solid Support Sales by Country (2021-2026) & (Tons)

Table 61. Middle East & Africa Oligonucleotide Synthesis Solid Support Revenue Market Share by Country (2021-2026)

Table 62. Middle East & Africa Oligonucleotide Synthesis Solid Support Sales by Type (2021-2026) & (Tons)

Table 63. Middle East & Africa Oligonucleotide Synthesis Solid Support Sales by Application (2021-2026) & (Tons)

Table 64. Key Market Drivers & Growth Opportunities of Oligonucleotide Synthesis Solid Support

Table 65. Key Market Challenges & Risks of Oligonucleotide Synthesis Solid Support

Table 66. Key Industry Trends of Oligonucleotide Synthesis Solid Support

Table 67. Oligonucleotide Synthesis Solid Support Raw Material

Table 68. Key Suppliers of Raw Materials

Table 69. Oligonucleotide Synthesis Solid Support Distributors List

Table 70. Oligonucleotide Synthesis Solid Support Customer List

Table 71. Global Oligonucleotide Synthesis Solid Support Sales Forecast by Region (2027-2032) & (Tons)

Table 72. Global Oligonucleotide Synthesis Solid Support Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 73. Americas Oligonucleotide Synthesis Solid Support Sales Forecast by Country (2027-2032) & (Tons)

Table 74. Americas Oligonucleotide Synthesis Solid Support Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 75. APAC Oligonucleotide Synthesis Solid Support Sales Forecast by Region (2027-2032) & (Tons)

Table 76. APAC Oligonucleotide Synthesis Solid Support Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 77. Europe Oligonucleotide Synthesis Solid Support Sales Forecast by Country (2027-2032) & (Tons)

Table 78. Europe Oligonucleotide Synthesis Solid Support Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 79. Middle East & Africa Oligonucleotide Synthesis Solid Support Sales Forecast by Country (2027-2032) & (Tons)

Table 80. Middle East & Africa Oligonucleotide Synthesis Solid Support Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 81. Global Oligonucleotide Synthesis Solid Support Sales Forecast by Type (2027-2032) & (Tons)

Table 82. Global Oligonucleotide Synthesis Solid Support Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 83. Global Oligonucleotide Synthesis Solid Support Sales Forecast by Application (2027-2032) & (Tons)

Table 84. Global Oligonucleotide Synthesis Solid Support Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 85. Nitto Denko Corporation Basic Information, Oligonucleotide Synthesis Solid Support Manufacturing Base, Sales Area and Its Competitors

Table 86. Nitto Denko Corporation Oligonucleotide Synthesis Solid Support Product

Portfolios and Specifications

Table 87. Nitto Denko Corporation Oligonucleotide Synthesis Solid Support Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 88. Nitto Denko Corporation Main Business

Table 89. Nitto Denko Corporation Latest Developments

Table 90. LGC Limited Basic Information, Oligonucleotide Synthesis Solid Support Manufacturing Base, Sales Area and Its Competitors

Table 91. LGC Limited Oligonucleotide Synthesis Solid Support Product Portfolios and Specifications

Table 92. LGC Limited Oligonucleotide Synthesis Solid Support Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 93. LGC Limited Main Business

Table 94. LGC Limited Latest Developments

Table 95. Sunresin New Materials Co., Ltd. Basic Information, Oligonucleotide Synthesis Solid Support Manufacturing Base, Sales Area and Its Competitors

Table 96. Sunresin New Materials Co., Ltd. Oligonucleotide Synthesis Solid Support Product Portfolios and Specifications

Table 97. Sunresin New Materials Co., Ltd. Oligonucleotide Synthesis Solid Support Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 98. Sunresin New Materials Co., Ltd. Main Business

Table 99. Sunresin New Materials Co., Ltd. Latest Developments

Table 100. Suzhou NanoMicro Technology Co., Ltd. Basic Information, Oligonucleotide Synthesis Solid Support Manufacturing Base, Sales Area and Its Competitors

Table 101. Suzhou NanoMicro Technology Co., Ltd. Oligonucleotide Synthesis Solid Support Product Portfolios and Specifications

Table 102. Suzhou NanoMicro Technology Co., Ltd. Oligonucleotide Synthesis Solid Support Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 103. Suzhou NanoMicro Technology Co., Ltd. Main Business

Table 104. Suzhou NanoMicro Technology Co., Ltd. Latest Developments

Table 105. FUJIFILM Holdings Corporation Basic Information, Oligonucleotide Synthesis Solid Support Manufacturing Base, Sales Area and Its Competitors

Table 106. FUJIFILM Holdings Corporation Oligonucleotide Synthesis Solid Support Product Portfolios and Specifications

Table 107. FUJIFILM Holdings Corporation Oligonucleotide Synthesis Solid Support Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 108. FUJIFILM Holdings Corporation Main Business

Table 109. FUJIFILM Holdings Corporation Latest Developments

Table 110. ChemGenes Corporation Basic Information, Oligonucleotide Synthesis Solid

Support Manufacturing Base, Sales Area and Its Competitors

Table 111. ChemGenes Corporation Oligonucleotide Synthesis Solid Support Product Portfolios and Specifications

Table 112. ChemGenes Corporation Oligonucleotide Synthesis Solid Support Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 113. ChemGenes Corporation Main Business

Table 114. ChemGenes Corporation Latest Developments

Table 115. Glen Research Corporation Basic Information, Oligonucleotide Synthesis Solid Support Manufacturing Base, Sales Area and Its Competitors

Table 116. Glen Research Corporation Oligonucleotide Synthesis Solid Support Product Portfolios and Specifications

Table 117. Glen Research Corporation Oligonucleotide Synthesis Solid Support Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 118. Glen Research Corporation Main Business

Table 119. Glen Research Corporation Latest Developments

Table 120. Merck KGaA Basic Information, Oligonucleotide Synthesis Solid Support Manufacturing Base, Sales Area and Its Competitors

Table 121. Merck KGaA Oligonucleotide Synthesis Solid Support Product Portfolios and Specifications

Table 122. Merck KGaA Oligonucleotide Synthesis Solid Support Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 123. Merck KGaA Main Business

Table 124. Merck KGaA Latest Developments

Table 125. Tianjin Nankai Hecheng Science & Technology Co., Ltd. Basic Information, Oligonucleotide Synthesis Solid Support Manufacturing Base, Sales Area and Its Competitors

Table 126. Tianjin Nankai Hecheng Science & Technology Co., Ltd. Oligonucleotide Synthesis Solid Support Product Portfolios and Specifications

Table 127. Tianjin Nankai Hecheng Science & Technology Co., Ltd. Oligonucleotide Synthesis Solid Support Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 128. Tianjin Nankai Hecheng Science & Technology Co., Ltd. Main Business

Table 129. Tianjin Nankai Hecheng Science & Technology Co., Ltd. Latest Developments

Table 130. Hongene Biotech Corporation Basic Information, Oligonucleotide Synthesis Solid Support Manufacturing Base, Sales Area and Its Competitors

Table 131. Hongene Biotech Corporation Oligonucleotide Synthesis Solid Support Product Portfolios and Specifications

Table 132. Hongene Biotech Corporation Oligonucleotide Synthesis Solid Support

Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 133. Hongene Biotech Corporation Main Business

Table 134. Hongene Biotech Corporation Latest Developments

Table 135. PoreSyn Solutions Basic Information, Oligonucleotide Synthesis Solid Support Manufacturing Base, Sales Area and Its Competitors

Table 136. PoreSyn Solutions Oligonucleotide Synthesis Solid Support Product Portfolios and Specifications

Table 137. PoreSyn Solutions Oligonucleotide Synthesis Solid Support Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 138. PoreSyn Solutions Main Business

Table 139. PoreSyn Solutions Latest Developments

Table 140. Thermo Fisher Scientific Inc. Basic Information, Oligonucleotide Synthesis Solid Support Manufacturing Base, Sales Area and Its Competitors

Table 141. Thermo Fisher Scientific Inc. Oligonucleotide Synthesis Solid Support Product Portfolios and Specifications

Table 142. Thermo Fisher Scientific Inc. Oligonucleotide Synthesis Solid Support Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 143. Thermo Fisher Scientific Inc. Main Business

Table 144. Thermo Fisher Scientific Inc. Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Oligonucleotide Synthesis Solid Support
- Figure 2. Oligonucleotide Synthesis Solid Support Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Oligonucleotide Synthesis Solid Support Sales Growth Rate 2021-2032 (Tons)
- Figure 7. Global Oligonucleotide Synthesis Solid Support Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Oligonucleotide Synthesis Solid Support Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Oligonucleotide Synthesis Solid Support Sales Market Share by Country/Region (2025)
- Figure 10. Oligonucleotide Synthesis Solid Support Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Controlled Pore Glass (CPG)
- Figure 12. Product Picture of Polystyrene-based Support
- Figure 13. Product Picture of Other Polymer-based Support
- Figure 14. Product Picture of Others
- Figure 15. Global Oligonucleotide Synthesis Solid Support Sales Market Share by Type in 2026
- Figure 16. Global Oligonucleotide Synthesis Solid Support Revenue Market Share by Type (2021-2026)
- Figure 17. Product Picture of Native Support
- Figure 18. Product Picture of Amino-functionalized Support
- Figure 19. Product Picture of Nucleoside-loaded Support
- Figure 20. Product Picture of Universal Support
- Figure 21. Product Picture of Specialty Modifier-loaded Support
- Figure 22. Product Picture of Others
- Figure 23. Global Oligonucleotide Synthesis Solid Support Sales Market Share by Functionalization Type in 2026
- Figure 24. Global Oligonucleotide Synthesis Solid Support Revenue Market Share by Functionalization Type (2021-2026)
- Figure 25. Oligonucleotide Synthesis Solid Support Consumed in Oligonucleotide Manufacturers and CDMOs

Figure 26. Global Oligonucleotide Synthesis Solid Support Market: Oligonucleotide Manufacturers and CDMOs (2021-2026) & (Tons)

Figure 27. Oligonucleotide Synthesis Solid Support Consumed in Pharmaceutical and Biotechnology Companies

Figure 28. Global Oligonucleotide Synthesis Solid Support Market: Pharmaceutical and Biotechnology Companies (2021-2026) & (Tons)

Figure 29. Oligonucleotide Synthesis Solid Support Consumed in Diagnostic Companies

Figure 30. Global Oligonucleotide Synthesis Solid Support Market: Diagnostic Companies (2021-2026) & (Tons)

Figure 31. Oligonucleotide Synthesis Solid Support Consumed in Academic and Research Institutions

Figure 32. Global Oligonucleotide Synthesis Solid Support Market: Academic and Research Institutions (2021-2026) & (Tons)

Figure 33. Oligonucleotide Synthesis Solid Support Consumed in Others

Figure 34. Global Oligonucleotide Synthesis Solid Support Market: Others (2021-2026) & (Tons)

Figure 35. Global Oligonucleotide Synthesis Solid Support Sale Market Share by Application (2025)

Figure 36. Global Oligonucleotide Synthesis Solid Support Revenue Market Share by Application in 2025

Figure 37. Oligonucleotide Synthesis Solid Support Sales by Company in 2025 (Tons)

Figure 38. Global Oligonucleotide Synthesis Solid Support Sales Market Share by Company in 2025

Figure 39. Oligonucleotide Synthesis Solid Support Revenue by Company in 2025 (\$ millions)

Figure 40. Global Oligonucleotide Synthesis Solid Support Revenue Market Share by Company in 2025

Figure 41. Global Oligonucleotide Synthesis Solid Support Sales Market Share by Geographic Region (2021-2026)

Figure 42. Global Oligonucleotide Synthesis Solid Support Revenue Market Share by Geographic Region in 2025

Figure 43. Americas Oligonucleotide Synthesis Solid Support Sales 2021-2026 (Tons)

Figure 44. Americas Oligonucleotide Synthesis Solid Support Revenue 2021-2026 (\$ millions)

Figure 45. APAC Oligonucleotide Synthesis Solid Support Sales 2021-2026 (Tons)

Figure 46. APAC Oligonucleotide Synthesis Solid Support Revenue 2021-2026 (\$ millions)

Figure 47. Europe Oligonucleotide Synthesis Solid Support Sales 2021-2026 (Tons)

Figure 48. Europe Oligonucleotide Synthesis Solid Support Revenue 2021-2026 (\$ millions)

Figure 49. Middle East & Africa Oligonucleotide Synthesis Solid Support Sales 2021-2026 (Tons)

Figure 50. Middle East & Africa Oligonucleotide Synthesis Solid Support Revenue 2021-2026 (\$ millions)

Figure 51. Americas Oligonucleotide Synthesis Solid Support Sales Market Share by Country in 2025

Figure 52. Americas Oligonucleotide Synthesis Solid Support Revenue Market Share by Country (2021-2026)

Figure 53. Americas Oligonucleotide Synthesis Solid Support Sales Market Share by Type (2021-2026)

Figure 54. Americas Oligonucleotide Synthesis Solid Support Sales Market Share by Application (2021-2026)

Figure 55. United States Oligonucleotide Synthesis Solid Support Revenue Growth 2021-2026 (\$ millions)

Figure 56. Canada Oligonucleotide Synthesis Solid Support Revenue Growth 2021-2026 (\$ millions)

Figure 57. Mexico Oligonucleotide Synthesis Solid Support Revenue Growth 2021-2026 (\$ millions)

Figure 58. Brazil Oligonucleotide Synthesis Solid Support Revenue Growth 2021-2026 (\$ millions)

Figure 59. APAC Oligonucleotide Synthesis Solid Support Sales Market Share by Region in 2025

Figure 60. APAC Oligonucleotide Synthesis Solid Support Revenue Market Share by Region (2021-2026)

Figure 61. APAC Oligonucleotide Synthesis Solid Support Sales Market Share by Type (2021-2026)

Figure 62. APAC Oligonucleotide Synthesis Solid Support Sales Market Share by Application (2021-2026)

Figure 63. China Oligonucleotide Synthesis Solid Support Revenue Growth 2021-2026 (\$ millions)

Figure 64. Japan Oligonucleotide Synthesis Solid Support Revenue Growth 2021-2026 (\$ millions)

Figure 65. South Korea Oligonucleotide Synthesis Solid Support Revenue Growth 2021-2026 (\$ millions)

Figure 66. Southeast Asia Oligonucleotide Synthesis Solid Support Revenue Growth 2021-2026 (\$ millions)

Figure 67. India Oligonucleotide Synthesis Solid Support Revenue Growth 2021-2026

(\$ millions)

Figure 68. Australia Oligonucleotide Synthesis Solid Support Revenue Growth 2021-2026 (\$ millions)

Figure 69. China Taiwan Oligonucleotide Synthesis Solid Support Revenue Growth 2021-2026 (\$ millions)

Figure 70. Europe Oligonucleotide Synthesis Solid Support Sales Market Share by Country in 2025

Figure 71. Europe Oligonucleotide Synthesis Solid Support Revenue Market Share by Country (2021-2026)

Figure 72. Europe Oligonucleotide Synthesis Solid Support Sales Market Share by Type (2021-2026)

Figure 73. Europe Oligonucleotide Synthesis Solid Support Sales Market Share by Application (2021-2026)

Figure 74. Germany Oligonucleotide Synthesis Solid Support Revenue Growth 2021-2026 (\$ millions)

Figure 75. France Oligonucleotide Synthesis Solid Support Revenue Growth 2021-2026 (\$ millions)

Figure 76. UK Oligonucleotide Synthesis Solid Support Revenue Growth 2021-2026 (\$ millions)

Figure 77. Italy Oligonucleotide Synthesis Solid Support Revenue Growth 2021-2026 (\$ millions)

Figure 78. Russia Oligonucleotide Synthesis Solid Support Revenue Growth 2021-2026 (\$ millions)

Figure 79. Middle East & Africa Oligonucleotide Synthesis Solid Support Sales Market Share by Country (2021-2026)

Figure 80. Middle East & Africa Oligonucleotide Synthesis Solid Support Sales Market Share by Type (2021-2026)

Figure 81. Middle East & Africa Oligonucleotide Synthesis Solid Support Sales Market Share by Application (2021-2026)

Figure 82. Egypt Oligonucleotide Synthesis Solid Support Revenue Growth 2021-2026 (\$ millions)

Figure 83. South Africa Oligonucleotide Synthesis Solid Support Revenue Growth 2021-2026 (\$ millions)

Figure 84. Israel Oligonucleotide Synthesis Solid Support Revenue Growth 2021-2026 (\$ millions)

Figure 85. Turkey Oligonucleotide Synthesis Solid Support Revenue Growth 2021-2026 (\$ millions)

Figure 86. GCC Countries Oligonucleotide Synthesis Solid Support Revenue Growth 2021-2026 (\$ millions)

Figure 87. Manufacturing Cost Structure Analysis of Oligonucleotide Synthesis Solid Support in 2026

Figure 88. Manufacturing Process Analysis of Oligonucleotide Synthesis Solid Support

Figure 89. Industry Chain Structure of Oligonucleotide Synthesis Solid Support

Figure 90. Channels of Distribution

Figure 91. Global Oligonucleotide Synthesis Solid Support Sales Market Forecast by Region (2027-2032)

Figure 92. Global Oligonucleotide Synthesis Solid Support Revenue Market Share Forecast by Region (2027-2032)

Figure 93. Global Oligonucleotide Synthesis Solid Support Sales Market Share Forecast by Type (2027-2032)

Figure 94. Global Oligonucleotide Synthesis Solid Support Revenue Market Share Forecast by Type (2027-2032)

Figure 95. Global Oligonucleotide Synthesis Solid Support Sales Market Share Forecast by Application (2027-2032)

Figure 96. Global Oligonucleotide Synthesis Solid Support Revenue Market Share Forecast by Application (2027-2032)

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