

# Oligonucleotide CDMO Market by Service (Contract Manufacturing (Clinical, Commercial), Development), Type (ASO, siRNA, (CPG Oligos, gRNA)), Application (Therapeutic, Research, Diagnostic), End User (Pharma, Biotech) - Global Forecast to 2029

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## Abstracts

The global oligonucleotide CDMO market is projected to reach USD 6.73 billion in 2029 from USD 2.51 billion in 2024, with a CAGR of 21.8% during the forecast period. Key factors driving market growth include increasing focus on the launch of novel oligo-based drugs and growing outsourcing to CDMOs. Oligonucleotides, such as antisense oligonucleotides (ASOs), small interfering RNAs (siRNAs), and aptamers, are being focused on due to the specificity and targeted action offered by these drugs. This has led to an increase in development activity followed by FDA approvals. For instance, in April 2023, Qalsody (tofersen) was approved by the US FDA for treating amyotrophic lateral sclerosis (ALS) associated with a mutation in the superoxide dismutase 1 (SOD1) gene. Additionally, expertise and lower costs incurred while outsourcing clinical development and manufacturing (clinical and commercial) further support the growth of this market.

“The contract manufacturing segment accounted for the largest share in the oligonucleotide CDMO market, by service type, in 2023”

In 2023, contract manufacturing segment accounted for the largest share of the oligonucleotide CDMO market. Factors such as expertise offered by CDMOs leading to the reduction in production timelines and improving production scalability, supported by an increase in the demand for oligonucleotide therapeutics are supporting the growth of this segment. Additionally, regulatory expertise offered by CDMOs further reduces time-to-market and operational risks is another factor driving the outsourcing of

manufacturing to CDMOs.

“The pharmaceutical and biotechnology companies end-user segment registered the highest growth rate and largest market share in the oligonucleotide CDMO market, by end user, during the forecast period”

Pharmaceutical and biotechnology companies are major end user segments of the oligonucleotide CDMO market. The increasing clinical and commercial demand for oligo-based therapies drives pharma and biotech companies to engage CDMOs for production. Oligonucleotide synthesis is complex and requires specialized expertise, high-end technologies, and regulatory compliance. CDMOs have established infrastructure and systems in place for offering to these companies. Thus, pharmaceutical and biotechnology companies largely rely on CDMOs, mainly for manufacturing, fill-finish, and other services.

“Asia Pacific: The fastest growing region in the oligonucleotide CDMO market”

Asia Pacific region, with countries like China, India, Japan, and South Korea are experiencing rapid growth in their biopharmaceutical industries, with increased focus on innovative therapies such as oligonucleotide-based drugs. Additionally, the Asia Pacific region offers significant cost advantages for CDMO services due to lower labor, production, and operational costs. This is attracting global players to outsource manufacturing activities from the Asia Pacific region.

The primary interviews conducted for this report can be categorized as follows:

By Company Type: Supply Side - 65% and Demand Side – 35%

By Designation: (Managers) - 45%, (CXOs, Directors)- 30%, and(Executives) - 25%

By Region: North America -40%, Europe -25%, Asia-Pacific -25%, Latin America -5%, Middle East & Africa - 5%

List of Companies Profiled in the Report:

Bachem (Switzerland)

Thermo Fisher Scientific Inc. (US)

Agilent Technologies, Inc. (US)

Maravai Lifesciences (US)

GenScript (US)

Wuxi Apptec (China)

Eurofins Scientific (Luxembourg)

Lonza (Switzerland)

Danaher Corporation (US)

Syngene International Limited (US)

EUROAPI (France)

Ajinomoto Co., Inc. (Japan)

ST Pharm (South Korea)

Kaneka Corporation (Japan)

Aurigene Pharmaceutical Services Ltd. (India)

PolyPeptide Group (Switzerland)

Biospring (Germany)

Oligo factory (US)

Corden Pharma (Switzerland)

LGC Biosearch Technologies (UK)

Bio-Synthesis Inc (US)

Microsynth (Switzerland)

Synoligo Biotechnologies, Inc. (US)

Hongene Biotech Corporation (China)

Sylentis, S.A. (Spain)

Creative Biogene. (US)

#### Research Coverage:

This report provides a detailed picture of the global oligonucleotide CDMO Market. It aims to estimate the size and future growth potential of the market across different segments such as service type, stage, type, application, end users and region. The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the oligonucleotide CDMO market. A detailed analysis of the key industry players has been done to provide insights into their business overview, solutions, and services; key strategies; contracts, partnerships, agreements, mergers and acquisitions, and recent developments associated with the protein expression market. Competitive analysis of upcoming startups in the oligonucleotide CDMO market ecosystem is covered in this report.

#### Reasons to buy this report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall oligonucleotide CDMO market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (Growing focus on development and commercialization

of oligo-based therapeutics), restraints (Complexities associated with oligonucleotide manufacturing ), opportunities (Increasing use of oligos for CRISPR/Cas 9 application), and challenges (Lack of sustainable and eco-friendly supply chain) influencing the growth of the oligonucleotide CDMO market.

**Innovation:** Detailed insights on upcoming technologies, research & development activities, in the oligonucleotide CDMO market

**Market Development:** Comprehensive information about lucrative markets – the report analyses the oligonucleotide CDMO market across varied regions.

**Market Diversification:** Exhaustive information about new services, untapped geographies, recent developments, and investments in the oligonucleotide CDMO market

**Competitive Assessment:** In-depth assessment of market shares, growth strategies, and service offerings of leading players in the oligonucleotide CDMO market like- Bachem (Switzerland), Thermo Fisher Scientific Inc. (US), Agilent Technologies, Inc. (US), EUROAPI (France), ST Pharm (South Korea), Wuxi Apptec (China), Maravai Lifesciences (US), and Biospring (Germany) among others

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