

mRNA Synthesis and Manufacturing Market Size, Share and Growth Outlook 2026: By Product (Consumables, Instruments), By Service, By Application, By Scale of Operation, By End User, Companies to 2034.

<https://marketpublishers.com/r/MA35206806AAEN.html>

Date: July 2026

Pages: 190

Price: US\$ 3,482.00 (Single User License)

ID: MA35206806AAEN

Abstracts

The global mRNA Synthesis and Manufacturing Market size is forecast to increase from \$2.61 Billion in 2026 to \$4.23 Billion in 2034 at a CAGR of 6.21% between 2026 and 2034.

The mRNA Synthesis and Manufacturing market report provides detailed analysis and outlook of mRNA Synthesis and Manufacturing segments including By Product (Consumables, Instruments), By Service (Synthesis, Purification, Manufacturing and Scale-up), By Application (Vaccine Production, Therapeutic Development, Drug Discovery, Cell and Gene Therapy (CGT), Others), By Scale of Operation (Research, Commercial), By End User (Biopharmaceutical Companies, Contract Research Organizations, Others) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

mRNA Synthesis and Manufacturing Industry Overview

Scalable Manufacturing Platforms Accelerate Commercial mRNA Production

The mRNA synthesis and manufacturing industry is transitioning into a highly industrialized production environment driven by growing demand for vaccines, oncology therapeutics, rare disease treatments, and in vivo cell therapies. Manufacturers are focusing on improving scalability, reproducibility, and regulatory compliance across the

entire production workflow. Advances in process engineering, lipid nanoparticle formulation, continuous manufacturing, and analytical characterization are enabling the transition from research-scale production to commercial manufacturing. Industry stakeholders are increasingly investing in platform technologies capable of supporting diverse mRNA products while maintaining the quality standards required for global regulatory approvals.

Continuous Manufacturing Resolves Scalability Challenges

A major industry transformation is the shift from conventional batch production toward continuous manufacturing systems. Modern microfluidic mixing technologies are now capable of producing lipid nanoparticles at rates exceeding 100 liters per hour while maintaining a polydispersity index below 0.1. These capabilities address longstanding challenges related to reproducibility, particle uniformity, and large-scale manufacturing of mRNA-lipid nanoparticle therapeutics. The adoption of high-throughput continuous production platforms enables more efficient manufacturing workflows, greater process control, and improved scalability for commercial supply. As mRNA therapies expand into broader therapeutic areas, continuous manufacturing is becoming a critical component of industrial production strategies.

Strategic Partnerships Expand Therapeutic Applications

Industry growth is increasingly supported by high-value collaborations and acquisitions focused on expanding mRNA applications. Eli Lilly's acquisition of Orna Therapeutics strengthens development efforts in cell therapy platforms, while collaborative programs involving NeuCyte and Grann Pharma are advancing mRNA-based treatments for rare neurological disorders. These strategic partnerships reflect growing confidence in mRNA technology beyond infectious disease applications. Biopharmaceutical companies are leveraging manufacturing expertise, delivery technologies, and clinical development capabilities to accelerate commercialization of next-generation therapeutics targeting oncology, genetic disorders, and regenerative medicine opportunities.

CMC Standardization Becomes a Core Industry Priority

Chemistry, Manufacturing, and Controls activities have emerged as a central focus area for the mRNA manufacturing ecosystem. Biopharmaceutical companies, contract development and manufacturing organizations, and industry forums are working to establish scalable GMP-compliant manufacturing blueprints that address critical

production bottlenecks. Key areas of emphasis include analytical method development, purification processes, process characterization, quality control strategies, and efficient scale-up from preclinical to commercial production. Standardized CMC frameworks are becoming increasingly important for ensuring regulatory compliance, manufacturing consistency, and reliable product quality as mRNA therapies advance through global development pipelines and commercial launch programs.

mRNA Synthesis and Manufacturing Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global mRNA Synthesis and Manufacturing market is witnessing increasing investments in innovation, product development, digital transformation, artificial intelligence integration, healthcare infrastructure expansion, and strategic partnerships across developed and emerging economies. Key Companies in the industry include- Danaher Corporation (Aldevron), TriLink BioTechnologies (Maravai LifeSciences), Merck KGaA, Thermo Fisher Scientific Inc., GenScript Biotech Corporation, WuXi Biologics, Azenta Life Sciences, Kaneka Eurogentec S.A., Samsung Biologics, Lonza Group Ltd. The mRNA Synthesis and Manufacturing market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the mRNA Synthesis and Manufacturing industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

- Growth mRNA Synthesis and Manufacturing Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

- Market Trends, Drivers, Potential Opportunities, and Challenges faced by mRNA Synthesis and Manufacturing companies

- Porter's Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

- Detailed SWOT Analysis of global and regional mRNA Synthesis and Manufacturing markets

Competitive analysis including business description, product analysis, and financial profiles

Key country specific analysis detailing key factors shaping the short-term and long-term outlook

Recent industry developments and news including mergers, acquisitions, product launches, expansions, and company announcements

mRNA Synthesis and Manufacturing Market Competitive Benchmarking and Company Analysis

Leading companies in mRNA Synthesis and Manufacturing industry include- Danaher Corporation (Aldevron), TriLink BioTechnologies (Maravai LifeSciences), Merck KGaA, Thermo Fisher Scientific Inc., GenScript Biotech Corporation, WuXi Biologics, Azenta Life Sciences, Kaneka Eurogentec S.A., Samsung Biologics, Lonza Group Ltd. The mRNA Synthesis and Manufacturing market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US mRNA Synthesis and Manufacturing Markets in 2026 and beyond- Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach \$8.2 Trillion in 2034 from \$5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the mRNA Synthesis and Manufacturing market remains one of the strongest-performing segments in the country.

The US mRNA Synthesis and Manufacturing Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance efficiency and cost management. The US mRNA Synthesis

and Manufacturing market faces successive waves of challenging trends, with strong opportunities across select segments. The CMS plan to implement Medicaid from 2027 is driving states to build eligibility verification systems throughout 2026. Looking ahead to 2034, we anticipate stronger results underpinned by opportunities exist across mRNA Synthesis and Manufacturing industry. On the medical device front, over 7,000 device manufacturers continue to gain from increasing demand from demand for implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of Canadian mRNA Synthesis and Manufacturing markets

Canada's strong mRNA Synthesis and Manufacturing sales performance is underpinned by an aging population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-sized enterprises across medical, diagnostic, and therapeutic devices. The Canadian mRNA Synthesis and Manufacturing market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany mRNA Synthesis and Manufacturing Trends and Perspectives to 2034- Financial sustainability, hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest mRNA Synthesis and Manufacturing market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering 90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of mRNA Synthesis and Manufacturing population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany mRNA Synthesis and Manufacturing industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the mRNA Synthesis and Manufacturing market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support mRNA

Synthesis and Manufacturing sales through 2034

France mRNA Synthesis and Manufacturing companies are emphasizing on opportunities for rapid, at-scale innovation to boost profitability over the long-term. The country's National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease management initiatives, workforce reforms, and efforts to improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics. INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were 651,000, producing a negative natural balance of about 6,000 for the first time since the end of the Second World War.

UK mRNA Synthesis and Manufacturing Market Size, Share, and Growth Projections to 2034- Rapid growth driven by new and existing brands across the industry value chain

Small high-need consumer segments remain key priority of mRNA Synthesis and Manufacturing distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or ?280 billion in 2025. According to the ONS, total healthcare spending grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was ?49 billion (14.1%) and voluntary health insurance was ?9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England's plan to give more than 500,000 staff access to new AI tools.

China mRNA Synthesis and Manufacturing Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

China mRNA Synthesis and Manufacturing market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of mRNA Synthesis and Manufacturing industry, offering opportunities for both competition and partnership. Over the forecast period, new and innovative product

launches remain key elements driving market outlook. China's healthcare industry is increasingly centered on expanding healthcare capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China's basic medical insurance covered 1.32662 billion people and the coverage rate was 95%. Regional disparities in consumer spending trends continue to become more pronounced in the Chinese mRNA Synthesis and Manufacturing industry. Over the forecast period, demand will keep shifting toward geriatrics, chronic disease management, rehabilitation, long-term care, and outpatient care, while pricing pressure will remain intense in drugs and consumables because reimbursement.

India mRNA Synthesis and Manufacturing Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian mRNA Synthesis and Manufacturing market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to make world-class diagnostics, robotics, and critical care devices.

Brazil mRNA Synthesis and Manufacturing market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts, with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

Middle East and Africa mRNA Synthesis and Manufacturing Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500

million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader MEA region one of the fastest-growing healthcare demand centers globally. The GCC countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to account for a disproportionately large share of regional healthcare spending.

Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria, and Kenya remain key healthcare markets due to their large populations, expanding private healthcare sectors, and growing investments in healthcare delivery systems.

mRNA Synthesis and Manufacturing Market Segmentation

By Product

Consumables

Instruments

By Service

Synthesis

Purification

Manufacturing and Scale-up

By Application

Vaccine Production

Therapeutic Development

Drug Discovery

Cell and Gene Therapy (CGT)

Others

By Scale of Operation

Research

Commercial

By End User

Biopharmaceutical Companies

Contract Research Organizations

Others

Leading Companies in mRNA Synthesis and Manufacturing Industry (2026)

Danaher Corporation (Aldevron)

TriLink BioTechnologies (Maravai LifeSciences)

Merck KGaA

Thermo Fisher Scientific Inc.

GenScript Biotech Corporation

WuXi Biologics

Azenta Life Sciences

Kaneka Eurogentec S.A.

Samsung Biologics

Lonza Group Ltd

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia, Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa, Other Africa

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Synthesis

Purification

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By Application

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GenScript Biotech Corporation

WuXi Biologics

Azenta Life Sciences

Kaneka Eurogentec S.A.

Samsung Biologics

Lonza Group Ltd

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