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Oligonucleotide CDMO Market Size, Share and Growth Outlook 2026: By Service Type (Contract Manufacturing, Contract Development), By Oligonucleotide Class, By Application, By End User, Companies to 2034.

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Abstracts

The global Oligonucleotide CDMO Market size is forecast to increase from $2.33 Billion in 2026 to $9.11 Billion in 2034 at a CAGR of 18.59% between 2026 and 2034.

The Oligonucleotide CDMO market report provides detailed analysis and outlook of Oligonucleotide CDMO segments including By Service Type (Contract Manufacturing, Contract Development), By Oligonucleotide Class (Antisense Oligonucleotides (ASOs), Small Interfering RNA (siRNA), Aptamers, microRNA (miRNA), CpG Oligonucleotides, Other Nucleic Acids), By Application (Therapeutic applications, Diagnostic applications, Research applications), By End User (Pharmaceutical and Biopharmaceutical Companies, Diagnostic Companies, Academic and Translational Biotech Firms) 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.

Oligonucleotide CDMO Industry Overview

Capacity Expansion, Advanced Manufacturing, and Analytical Innovation Are Accelerating the Oligonucleotide CDMO Industry

The oligonucleotide contract development and manufacturing organization (CDMO) industry is undergoing rapid expansion as pharmaceutical companies accelerate the development of nucleic acid therapeutics for genetic diseases, oncology, and rare

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disorders. Rising demand for commercial-scale oligonucleotide active pharmaceutical ingredients (APIs), peptide-oligonucleotide conjugates, and next-generation delivery platforms is driving significant investment in large-scale manufacturing infrastructure, solid-phase synthesis capacity, and advanced analytical technologies. CDMOs are strengthening integrated development capabilities that combine process development, manufacturing, purification, analytical characterization, and regulatory support to meet the growing requirements of global biopharmaceutical pipelines.

Manufacturing Infrastructure Expands to Support Commercial Demand

Leading CDMOs are investing aggressively in new production facilities to meet increasing commercial and clinical manufacturing needs. Bachem Holding inaugurated its advanced 'Building K' manufacturing facility in Bubendorf, Switzerland, specifically designed to expand commercial-scale production of peptide and oligonucleotide APIs. Following successful regulatory inspection, the facility is progressively increasing commercial manufacturing capacity throughout 2026 to support rising global pharmaceutical demand. WuXi AppTec likewise continues expanding its WuXi TIDES integrated platform, increasing total solid-phase oligonucleotide synthesis reactor capacity beyond 8 mol while constructing two dedicated oligonucleotide and peptide manufacturing facilities at Taixing. In parallel, the company is establishing its first major TIDES manufacturing operation in Singapore, creating a broader global production network capable of supporting end-to-end development and large-scale commercial supply.

Advanced Analytical Technologies Strengthen Development Efficiency

Beyond manufacturing expansion, analytical innovation is becoming a key competitive differentiator for oligonucleotide CDMOs. Agilent Technologies entered a two-year research collaboration with Singapore's Nucleic Acid Therapeutics Initiative to develop optimized analytical and purification workflows for lipid-conjugated oligonucleotide therapeutics. Through deployment of Bio UHPLC systems and time-of-flight mass spectrometry, the collaboration aims to improve analytical characterization and purification while supporting the development of oligonucleotide therapies targeting complex extrahepatic tissues. These advances highlight the industry's continued transition toward fully integrated CDMO platforms that combine high-capacity manufacturing, sophisticated analytical capabilities, and scalable process development to accelerate commercialization of next-generation nucleic acid therapeutics.

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Oligonucleotide CDMO Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Oligonucleotide CDMO 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- Bachem Holding AG, Agilent Technologies, Inc., Thermo Fisher Scientific Inc., Lonza Group Ltd., WuXi AppTec (STA Pharmaceutical), Syngene International Limited, PolyPeptide Group AG, EUROAPI S.A., CordenPharma, Curia Global, Inc.. The Oligonucleotide CDMO 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 Oligonucleotide CDMO industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

Growth Oligonucleotide CDMO Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

Market Trends, Drivers, Potential Opportunities, and Challenges faced by Oligonucleotide CDMO 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 Oligonucleotide CDMO 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

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Oligonucleotide CDMO Market Competitive Benchmarking and Company Analysis

Leading companies in Oligonucleotide CDMO industry include- Bachem Holding AG, Agilent Technologies, Inc., Thermo Fisher Scientific Inc., Lonza Group Ltd., WuXi AppTec (STA Pharmaceutical), Syngene International Limited, PolyPeptide Group AG, EUROAPI S.A., CordenPharma, Curia Global, Inc.. The Oligonucleotide CDMO 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 Oligonucleotide CDMO 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 Oligonucleotide CDMO market remains one of the strongest-performing segments in the country.

The US Oligonucleotide CDMO 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 Oligonucleotide CDMO 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 Oligonucleotide CDMO 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 Oligonucleotide CDMO markets

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Canada's strong Oligonucleotide CDMO 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 Oligonucleotide CDMO 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 Oligonucleotide CDMO 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 Oligonucleotide CDMO 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 Oligonucleotide CDMO population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Oligonucleotide CDMO 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 Oligonucleotide CDMO market outlook.

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

France Oligonucleotide CDMO 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

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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 Oligonucleotide CDMO 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 Oligonucleotide CDMO 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 Oligonucleotide CDMO Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

China Oligonucleotide CDMO 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 Oligonucleotide CDMO 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 Oligonucleotide CDMO 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.

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

Indian Oligonucleotide CDMO 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 Oligonucleotide CDMO 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 Oligonucleotide CDMO 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.

Oligonucleotide CDMO Market Segmentation

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Agilent Technologies, Inc.

Thermo Fisher Scientific Inc.

Lonza Group Ltd.

WuXi AppTec (STA Pharmaceutical)

Syngene International Limited

PolyPeptide Group AG

EUROAPI S.A.

CordenPharma

Curia Global, Inc.

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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Contents

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CHAPTER 8- EUROPE OLIGONUCLEOTIDE CDMO MARKET SIZE ANALYSIS AND OUTLOOK

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CHAPTER 9- ASIA PACIFIC OLIGONUCLEOTIDE CDMO MARKET SIZE ANALYSIS AND OUTLOOK

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CHAPTER 10- SOUTH AND CENTRAL AMERICA OLIGONUCLEOTIDE CDMO MARKET SIZE ANALYSIS AND OUTLOOK

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CHAPTER 11- MIDDLE EAST AND AFRICA OLIGONUCLEOTIDE CDMO MARKET SIZE ANALYSIS AND OUTLOOK

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CHAPTER 12- COMPANY PROFILES

CHAPTER 13- APPENDIX

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