

Peptide and Oligonucleotide CDMO Market Size, Share and Growth Outlook 2026: By Product (Peptides, Oligonucleotides, Peptide-Oligonucleotide Conjugates), By Service, By End Use, Companies to 2034.

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Abstracts

The global Peptide and Oligonucleotide CDMO Market size is forecast to increase from \$4.16 Billion in 2026 to \$10.2 Billion in 2034 at a CAGR of 11.86% between 2026 and 2034.

The Peptide and Oligonucleotide CDMO market report provides detailed analysis and outlook of Peptide and Oligonucleotide CDMO segments including By Product (Peptides, Oligonucleotides, Peptide-Oligonucleotide Conjugates), By Service (Contract Development, Contract Manufacturing, Analytical and Quality Control, Regulatory and Compliance Support), By End Use (Pharmaceutical Companies, Biopharmaceutical Companies, Academic and Research Institutions, Diagnostic Laboratories) 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.

Peptide and Oligonucleotide CDMO Industry Overview

Specialized Manufacturing Capabilities Are Transforming the CDMO Landscape

The peptide and oligonucleotide CDMO industry is experiencing rapid transformation as pharmaceutical companies increasingly outsource the development and manufacturing of complex therapeutic molecules. Growing demand for peptide therapeutics, oligonucleotide drugs, RNA-based medicines, and personalized therapies is

encouraging contract manufacturers to expand specialized production capabilities, regulatory expertise, and advanced process technologies. The industry is moving beyond traditional API manufacturing toward integrated development platforms capable of supporting complex synthesis, analytical characterization, scale-up, and commercial production for emerging therapeutic modalities.

Continuous Manufacturing Is Improving Efficiency and Scalability

A major trend across the sector is the adoption of continuous manufacturing technologies that improve productivity, product quality, and manufacturing flexibility. Leading CDMOs are replacing conventional batch production with continuous processing to achieve greater capital efficiency and tighter process control for complex molecules. Lonza continues to expand its continuous bioprocessing infrastructure, while Thermo Fisher Scientific is investing in continuous manufacturing technologies for specialized therapeutic delivery, aligning with FDA guidance promoting more efficient pharmaceutical production. These investments reflect the industry's commitment to modern manufacturing platforms capable of supporting commercial-scale production with enhanced consistency and operational efficiency.

Technology Innovation Supports Advanced API Manufacturing

Manufacturers are increasingly investing in novel downstream processing technologies to address the growing complexity of peptide and oligonucleotide synthesis. Nagase & Co., Ltd., together with its partner PeptiStar Inc., highlighted this direction during TIDES USA 2026 by showcasing integrated CDMO services focused on advanced active pharmaceutical ingredient production. The collaboration emphasized innovative downstream technologies designed to overcome longstanding manufacturing challenges while improving scalability, purification efficiency, and overall production performance for peptide and oligonucleotide APIs. These developments demonstrate the industry's focus on building technically advanced manufacturing platforms capable of supporting next-generation therapeutics.

Novel Modalities Drive Infrastructure Expansion

The emergence of increasingly sophisticated therapeutic formats is reshaping CDMO investment priorities across the industry. Manufacturers are expanding dedicated cleanroom capacity, high-potency active pharmaceutical ingredient (HPAPI) infrastructure, and specialized manufacturing suites to support peptide-oligonucleotide conjugates and other novel modalities. These highly specialized therapeutic classes

require advanced containment systems, regulatory expertise, and manufacturing capabilities that are often unavailable within conventional pharmaceutical production facilities. As personalized medicine pipelines continue to diversify, CDMOs are positioning themselves as strategic development partners capable of delivering the specialized infrastructure and technical expertise required for complex therapeutic manufacturing.

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

The global Peptide and 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, Lonza Group Ltd., Agilent Technologies, Inc. , Thermo Fisher Scientific Inc., WuXi AppTec (WuXi TIDES), PolyPipeptide Group, Merck KGaA (MilliporeSigma), ST Pharm Co., Ltd., Kaneka Eurogentec S.A., Syngene International Limited. The Peptide and 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 Peptide and 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 Peptide and Oligonucleotide CDMO Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

- Market Trends, Drivers, Potential Opportunities, and Challenges faced by Peptide and 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 Peptide and 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

Peptide and Oligonucleotide CDMO Market Competitive Benchmarking and Company Analysis

Leading companies in Peptide and Oligonucleotide CDMO industry include- Bachem Holding AG, Lonza Group Ltd., Agilent Technologies, Inc. , Thermo Fisher Scientific Inc., WuXi AppTec (WuXi TIDES), PolyPipeptide Group, Merck KGaA (MilliporeSigma), ST Pharm Co., Ltd., Kaneka Eurogentec S.A., Syngene International Limited. The Peptide and 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 Peptide and 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 Peptide and Oligonucleotide CDMO market remains one of the strongest-performing segments in the country.

The US Peptide and 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 Peptide and

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 Peptide and 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 Peptide and Oligonucleotide CDMO markets

Canada's strong Peptide and 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 Peptide and 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 Peptide and 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 Peptide and 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 Peptide and Oligonucleotide CDMO population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Peptide and 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 Peptide and 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 Peptide and Oligonucleotide CDMO sales through 2034

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

China Peptide and 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 Peptide and 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 Peptide and 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.

India Peptide and 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 Peptide and 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 Peptide and 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 Peptide and 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.

Peptide and Oligonucleotide CDMO Market Segmentation

By Product

Peptides

Oligonucleotides

Peptide-Oligonucleotide Conjugates

By Service

Contract Development

Contract Manufacturing

Analytical and Quality Control

Regulatory and Compliance Support

By End Use

Pharmaceutical Companies

Biopharmaceutical Companies

Academic and Research Institutions

Diagnostic Laboratories

Leading Companies in Peptide and Oligonucleotide CDMO Industry (2026)

Bachem Holding AG

Lonza Group Ltd.

Agilent Technologies, Inc.

Thermo Fisher Scientific Inc.

WuXi AppTec (WuXi TIDES)

PolyPipeptide Group

Merck KGaA (MilliporeSigma)

ST Pharm Co., Ltd.

Kaneka Eurogentec S.A.

Syngene International Limited

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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By Product

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Oligonucleotides

Peptide-Oligonucleotide Conjugates

By Service

Contract Development

Contract Manufacturing

Analytical and Quality Control

Regulatory and Compliance Support

By End Use

Pharmaceutical Companies

Biopharmaceutical Companies

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Agilent Technologies, Inc.

Thermo Fisher Scientific Inc.

WuXi AppTec (WuXi TIDES)

PolyPipeptide Group

Merck KGaA (MilliporeSigma)

ST Pharm Co., Ltd.

Kaneka Eurogentec S.A.

Syngene International Limited

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