

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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Report description:

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"

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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,

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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

Table of Contents:

1□INTRODUCTION□	27
1.1□STUDY OBJECTIVES□	27
1.2□MARKET DEFINITION□	27
1.3□MARKET SCOPE□	28
1.3.1□MARKETS COVERED & REGIONS CONSIDERED□	28
1.3.2□INCLUSIONS & EXCLUSIONS□	29
1.3.3□YEARS CONSIDERED□	29
1.3.4□CURRENCY CONSIDERED□	30
1.4□STAKEHOLDERS□	30
2□RESEARCH METHODOLOGY□	31
2.1□RESEARCH DATA□	31
2.1.1□SECONDARY DATA□	32
2.1.2□PRIMARY DATA□	33
2.2□MARKET ESTIMATION METHODOLOGY□	34
2.2.1□INSIGHTS FROM PRIMARY EXPERTS□	37
2.2.2□TOP-DOWN APPROACH□	37
2.3□MARKET GROWTH RATE PROJECTIONS□	38
2.4□DATA TRIANGULATION□	40
2.5□RESEARCH ASSUMPTIONS□	41
2.6□RESEARCH LIMITATIONS□	41

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2.7	RISK ANALYSIS	42
3	EXECUTIVE SUMMARY	43
4	PREMIUM INSIGHTS	47
4.1	OLIGONUCLEOTIDE CDMO MARKET OVERVIEW	47
4.2	NORTH AMERICA: OLIGONUCLEOTIDE CDMO MARKET, BY SERVICE TYPE & COUNTRY (2023)	48
4.3	OLIGONUCLEOTIDE CDMO MARKET, BY TYPE, 2024 VS 2029	48
4.4	OLIGONUCLEOTIDE CDMO MARKET, BY APPLICATION, 2024 VS 2029	49
4.5	OLIGONUCLEOTIDE CDMO MARKET SHARE, BY END USER, 2023	49
4.6	OLIGONUCLEOTIDE CDMO MARKET: GEOGRAPHIC GROWTH OPPORTUNITIES	50
	?	
5	MARKET OVERVIEW	51
5.1	INTRODUCTION	51
5.2	MARKET DYNAMICS	51
5.2.1	DRIVERS	52
5.2.1.1	Growing focus on development and commercialization of oligo-based therapeutics	52
5.2.1.2	Advantages of contract development and manufacturing	54
5.2.1.3	Increasing focus on precision/personalized medicine	54
5.2.1.4	Technological advancements	54
5.2.2	RESTRAINTS	55
5.2.2.1	Complexities associated with therapeutic oligonucleotide manufacturing	55
5.2.3	OPPORTUNITIES	56
5.2.3.1	Increasing use of oligos in CRISPR-Cas9 applications	56
5.2.4	CHALLENGES	56
5.2.4.1	Lack of sustainable and eco-friendly supply chain	56
5.3	TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESSES	57
5.4	SUPPLY CHAIN ANALYSIS	57
5.5	VALUE CHAIN ANALYSIS	58
5.6	ECOSYSTEM ANALYSIS	60
5.6.1	ROLE IN ECOSYSTEM	60
5.7	TECHNOLOGY ANALYSIS	62
5.7.1	KEY TECHNOLOGIES	62
5.7.1.1	Process technologies	62
5.7.1.1.1	Solid-phase synthesis	62
5.7.1.1.2	Liquid-phase synthesis	62
5.7.1.1.3	Enzymatic oligo synthesis	63
5.7.2	COMPLEMENTARY TECHNOLOGIES	64
5.7.2.1	Purification, analysis, and quality control technologies	64
5.7.2.1.1	Chromatography	64
5.7.2.1.2	Mass spectrometry	64
5.7.2.2	Other technologies	64
5.7.2.2.1	Polymerase chain reaction (PCR)	64
5.7.2.2.2	Next-generation sequencing	65
5.7.3	ADJACENT TECHNOLOGIES	65
5.7.3.1	3D printing	65
5.8	PRICING ANALYSIS	66
5.8.1	INDICATIVE PRICE OF OLIGONUCLEOTIDE CDMO SERVICES, BY KEY PLAYER	66
5.8.2	AVERAGE SELLING PRICE, BY REGION (QUALITATIVE)	67

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5.9 KEY CONFERENCES & EVENTS IN 2024-2025 67

5.10 REGULATORY LANDSCAPE 68

5.10.1 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS 68

5.10.2 REGULATORY FRAMEWORK 71

5.11 PORTER'S FIVE FORCES ANALYSIS 72

5.11.1 DEGREE OF COMPETITION 73

5.11.2 BARGAINING POWER OF SUPPLIERS 73

5.11.3 BARGAINING POWER OF BUYERS 73

5.11.4 THREAT OF SUBSTITUTES 73

5.11.5 THREAT OF NEW ENTRANTS 73

5.12 KEY STAKEHOLDERS & BUYING CRITERIA 74

5.12.1 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR OLIGONUCLEOTIDE CDMO SERVICES 74

5.13 KEY BUYING CRITERIA 75

5.14 INVESTMENT & FUNDING SCENARIO 76

5.15 IMPACT OF AI/GEN AI ON OLIGONUCLEOTIDE CDMO MARKET 77

6 OLIGONUCLEOTIDE CDMO MARKET, BY SERVICE TYPE 79

6.1 INTRODUCTION 80

6.2 CONTRACT MANUFACTURING 80

6.2.1 COMMERCIAL STAGE 83

6.2.1.1 Flexible, scalable production facilities to propel market growth 83

6.2.2 CLINICAL STAGE 85

6.2.2.1 Growing demand for oligonucleotide-based therapeutics to drive market 85

6.3 CONTRACT DEVELOPMENT 88

6.3.1 GROWING FOCUS ON REDUCING MANUFACTURING RISKS TO SUPPORT MARKET GROWTH 88

6.4 OTHER SERVICES 90

7 OLIGONUCLEOTIDE CDMO MARKET, BY TYPE 93

7.1 INTRODUCTION 94

7.2 ANTISENSE OLIGONUCLEOTIDES 94

7.2.1 SPECIFIC DEVELOPMENT & MANUFACTURING REQUIREMENTS WELL-SUPPORTED BY CDMOS TO DRIVE MARKET GROWTH 94

7.3 SMALL INTERFERING RNA 96

7.3.1 POTENTIAL IN THERAPEUTIC APPLICATIONS TO DRIVE MARKET GROWTH 96

7.4 OTHER OLIGONUCLEOTIDES 99

?

8 OLIGONUCLEOTIDE CDMO MARKET, BY APPLICATION 102

8.1 INTRODUCTION 103

8.2 THERAPEUTIC APPLICATIONS 103

8.2.1 GROWING DEMAND FOR OLIGONUCLEOTIDE-BASED THERAPEUTICS TO DRIVE MARKET GROWTH 103

8.3 RESEARCH APPLICATIONS 105

8.3.1 USE OF OLIGOS IN SEQUENCING FOR ADVANCING DRUG DEVELOPMENT TO SUPPORT GROWTH 105

8.4 DIAGNOSTIC APPLICATIONS 108

8.4.1 GROWING APPLICATIONS IN MOLECULAR DIAGNOSTICS AND IVD TO PROPEL MARKET 108

9 OLIGONUCLEOTIDE CDMO MARKET, BY END USER 111

9.1 INTRODUCTION 112

9.2 PHARMACEUTICAL & BIOTECHNOLOGY COMPANIES 112

9.2.1 INCREASED INVESTMENTS IN OLIGONUCLEOTIDE DRUG PIPELINES TO SUPPORT MARKET GROWTH 112

9.3 DIAGNOSTIC COMPANIES 114

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9.3.1	GROWTH OF PERSONALIZED DIAGNOSTICS TO PROPEL MARKET	114
9.4	OTHER END USERS	117
10	OLIGONUCLEOTIDE CDMO MARKET, BY REGION	120
10.1	INTRODUCTION	121
10.2	NORTH AMERICA	121
10.2.1	MACROECONOMIC OUTLOOK FOR NORTH AMERICA	121
10.2.2	US	126
10.2.2.1	Rising approvals of oligonucleotide-based drugs to support market growth	126
10.2.3	CANADA	128
10.2.3.1	Government initiatives to drive market growth in Canada	128
10.3	EUROPE	130
10.3.1	MACROECONOMIC OUTLOOK FOR EUROPE	130
10.3.2	GERMANY	133
10.3.2.1	Academic-industry collaborations to drive market	133
10.3.3	UK	136
10.3.3.1	Strategic investments in biomanufacturing to boost market growth	136
10.3.4	FRANCE	138
10.3.4.1	Focus on advanced biologics manufacturing to drive market	138
10.3.5	ITALY	140
10.3.5.1	Increasing focus on biotechnology innovation to boost market growth	140
10.3.6	SPAIN	142
10.3.6.1	Strategic investments in biotechnology to support market growth	142
10.3.7	REST OF EUROPE	144
10.4	ASIA PACIFIC	146
10.4.1	MACROECONOMIC OUTLOOK FOR ASIA PACIFIC	147
10.4.2	CHINA	151
10.4.2.1	Government-backed Initiatives and expansion of major companies to strengthen biotechnology sector in China	151
10.4.3	JAPAN	153
10.4.3.1	Increased investment in oligonucleotide research and manufacturing to boost market	153
10.4.4	INDIA	155
10.4.4.1	Rapidly expanding biopharma ecosystem to drive market	155
10.4.5	SOUTH KOREA	158
10.4.5.1	Robust government support to expand oligonucleotide CDMO sector	158
10.4.6	REST OF ASIA PACIFIC	160
10.5	LATIN AMERICA	162
10.5.1	MACROECONOMIC OUTLOOK FOR LATIN AMERICA	163
10.5.2	BRAZIL	165
10.5.2.1	Strong research institutions and growing collaboration between academia and industry to support market growth	165
10.5.3	MEXICO	167
10.5.3.1	Rapidly advancing pharmaceutical and biotechnology sectors to fuel growth	167
10.5.4	REST OF LATIN AMERICA	169
10.6	MIDDLE EAST & AFRICA	171
10.6.1	RIISING INVESTMENTS IN HEALTHCARE AND GROWING FOCUS ON PERSONALIZED MEDICINE TO DRIVE MARKET	171
10.6.2	MACROECONOMIC OUTLOOK FOR MIDDLE EAST	172
10.6.3	MACROECONOMIC OUTLOOK FOR AFRICA	172
11	COMPETITIVE LANDSCAPE	175
11.1	OVERVIEW	175

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11.2	KEY PLAYER STRATEGIES/RIGHT TO WIN	175
11.2.1	OVERVIEW OF STRATEGIES ADOPTED BY PLAYERS IN OLIGONUCLEOTIDE CDMO MARKET	176
11.3	REVENUE ANALYSIS, 2021-2023	177
11.4	MARKET SHARE ANALYSIS, 2023	178
11.5	COMPANY EVALUATION MATRIX: KEY PLAYERS, 2023	180
11.5.1	STARS	180
11.5.2	EMERGING LEADERS	180
11.5.3	PERVASIVE PLAYERS	181
11.5.4	PARTICIPANTS	181
11.5.5	COMPANY FOOTPRINT: KEY PLAYERS, 2023	182
11.5.5.1	Company footprint	182
11.5.5.2	Region footprint	183
11.5.5.3	Service type footprint	184
11.5.5.4	Type footprint	185
11.5.5.5	Application footprint	186
11.6	COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2023	187
11.6.1	PROGRESSIVE COMPANIES	187
11.6.2	RESPONSIVE COMPANIES	187
11.6.3	DYNAMIC COMPANIES	187
11.6.4	STARTING BLOCKS	187
11.6.5	COMPETITIVE BENCHMARKING	189
11.6.5.1	Detailed list of key startups/SMES	189
11.6.5.2	Competitive benchmarking of startups/SMEs	190
11.7	COMPANY VALUATION AND FINANCIAL METRICS	191
11.8	BRAND/SERVICE COMPARISON	192
11.9	COMPETITIVE SCENARIO	193
11.9.1	DEALS	193
11.9.2	EXPANSIONS	194
12	COMPANY PROFILES	196
12.1	KEY PLAYERS	196
12.1.1	BACHEM	196
12.1.1.1	Business overview	196
12.1.1.2	Services offered	197
12.1.1.3	Recent developments	198
12.1.1.3.1	Deals	198
12.1.1.4	MnM view	198
12.1.1.4.1	Key strengths	198
12.1.1.4.2	Strategic choices	198
12.1.1.4.3	Weaknesses and competitive threats	198
12.1.2	THERMO FISHER SCIENTIFIC INC.	199
12.1.2.1	Business overview	199
12.1.2.2	Services offered	200
12.1.2.3	Recent developments	201
12.1.2.3.1	Deals	201
12.1.2.3.2	Expansions	201
12.1.2.4	MnM view	201
12.1.2.4.1	Key strengths	201

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- 12.1.2.4.2 Strategic choices 201
- 12.1.2.4.3 Weaknesses and competitive threats 202
- ?
- 12.1.3 AGILENT TECHNOLOGIES, INC. 203
 - 12.1.3.1 Business overview 203
 - 12.1.3.2 Services offered 204
 - 12.1.3.3 Recent developments 205
 - 12.1.3.3.1 Deals 205
 - 12.1.3.3.2 Expansions 205
 - 12.1.3.4 MnM view 206
 - 12.1.3.4.1 Key strengths 206
 - 12.1.3.4.2 Strategic choices 206
 - 12.1.3.4.3 Weaknesses and competitive threats 206
- 12.1.4 WUXI APPTec 207
 - 12.1.4.1 Business overview 207
 - 12.1.4.2 Services offered 208
 - 12.1.4.3 Recent developments 209
 - 12.1.4.3.1 Expansions 209
 - 12.1.4.4 MnM view 209
 - 12.1.4.4.1 Key strengths 209
 - 12.1.4.4.2 Strategic choices made 209
 - 12.1.4.4.3 Weaknesses and competitive threats 210
- 12.1.5 MARAVAI LIFESCIENCES 211
 - 12.1.5.1 Business overview 211
 - 12.1.5.2 Services offered 212
 - 12.1.5.3 Recent developments 213
 - 12.1.5.3.1 Deals 213
- 12.1.6 LONZA 214
 - 12.1.6.1 Business overview 214
 - 12.1.6.2 Services offered 215
 - 12.1.6.3 Recent developments 216
 - 12.1.6.3.1 Deals 216
 - 12.1.6.3.2 Expansions 216
- 12.1.7 EUROFINS SCIENTIFIC 217
 - 12.1.7.1 Business overview 217
 - 12.1.7.2 Services offered 218
 - 12.1.7.3 Recent developments 219
 - 12.1.7.3.1 Deals 219
 - 12.1.7.3.2 Expansions 219
- 12.1.8 DANAHER CORPORATION 220
 - 12.1.8.1 Business overview 220
 - 12.1.8.2 Services offered 222
 - 12.1.8.3 Recent developments 222
 - 12.1.8.3.1 Expansions 222
- ?
- 12.1.9 GENSCRIPT 223
 - 12.1.9.1 Business overview 223

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12.1.9.2	Services offered	224
12.1.9.3	Recent developments	225
12.1.9.3.1	Expansions	225
12.1.10	SYNGENE INTERNATIONAL LIMITED	226
12.1.10.1	Business overview	226
12.1.10.2	Services offered	227
12.1.10.3	Recent developments	227
12.1.10.3.1	Expansions	227
12.1.11	EUROAPI	228
12.1.11.1	Business overview	228
12.1.11.2	Services offered	229
12.1.11.3	Recent developments	230
12.1.11.3.1	Deals	230
12.1.11.3.2	Expansions	230
12.1.12	AJINOMOTO CO., INC.	231
12.1.12.1	Business overview	231
12.1.12.2	Services offered	232
12.1.13	ST PHARM	233
12.1.13.1	Business overview	233
12.1.13.2	Services offered	234
12.1.13.3	Recent developments	234
12.1.13.3.1	Expansions	234
12.1.13.3.2	Other developments	234
12.1.14	KANEKA CORPORATION	235
12.1.14.1	Business overview	235
12.1.14.2	Services offered	236
12.1.15	POLYPEPTIDE GROUP	237
12.1.15.1	Business overview	237
12.1.15.2	Services offered	238
12.1.15.3	Recent developments	239
12.1.15.3.1	Deals	239
12.1.16	AURIGENE PHARMACEUTICAL SERVICES LTD.	240
12.1.16.1	Business overview	240
12.1.16.2	Services offered	240
12.1.17	BIOSPRING	241
12.1.17.1	Business overview	241
12.1.17.2	Services offered	241
12.1.17.3	Recent developments	242
12.1.17.3.1	Service approvals	242
12.1.17.3.2	Expansions	242
12.2	OTHER PLAYERS	243
12.2.1	OLIGO FACTORY	243
12.2.2	CORDEN PHARMA	243
12.2.3	LGC BIOSEARCH TECHNOLOGIES	244
12.2.4	BI0-SYNTHESIS, INC.	244
12.2.5	MICROSYNTH	245
12.2.6	SYNOLIGO BIOTECHNOLOGIES, INC.	245

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12.2.7 HONGENE BIOTECH CORPORATION 246

12.2.8 SYLENTIS, S.A. 246

12.2.9 CREATIVE BIOGENE 247

13 APPENDIX 248

13.1 DISCUSSION GUIDE 248

13.2 KNOWLEDGESTORE: MARKETSDMARKETS' SUBSCRIPTION PORTAL 251

13.3 CUSTOMIZATION OPTIONS 253

13.4 RELATED REPORTS 253

13.5 AUTHOR DETAILS 254

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