

# Global Capillary Chromatography Column Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Capillary Chromatography Column market size is expected to reach \$ 1567 million by 2032, rising at a market growth of 7.8% CAGR during the forecast period (2026-2032).

A Capillary Gas Chromatography Column is a critical consumable in gas chromatography systems, consisting of a slender glass or fused silica capillary tube typically with an outer diameter of 0.32–0.53 mm and an inner diameter ranging from 0.10 to 0.53 mm. The inner wall is coated with a stationary phase such as polydimethylsiloxane or modified silicone polymer to facilitate separation of gaseous mixtures or volatile compounds. Common capillary column configurations include Wall Coated Open Tubular (WCOT), Solid Phase Microextraction (SPME), and bonded phase capillaries, with varied stationary phase chemistries offering non-polar, medium-polar, and polar separation options.

During analysis, a carrier gas (e.g., helium, nitrogen, or hydrogen) carries the vaporized sample through the capillary column, where differential interactions with the stationary phase enable high-resolution separation. Detectors such as Flame Ionization Detector (FID) or Mass Spectrometer (MS) capture component signals post-separation.

Capillary GC columns are widely utilized across environmental testing, food safety analysis, pharmaceutical quality control, petrochemical analysis, clinical diagnostics, and organic research laboratories. They are valued for high efficiency, enhanced sensitivity, and capacity for trace-level component separation. Manufacturing this product demands precision fused silica or glass substrates, uniform stationary phase coatings, strict control of internal diameter, contamination-free processing, and advanced quality testing to ensure high theoretical plate counts, thermal stability,

minimal dead volume, and long service life. Suppliers are typically specialized chromatography consumable manufacturers or analytical instrument companies focused on innovation and performance improvement.

The market for Capillary Gas Chromatography Columns exhibits significant development opportunities backed by key driving forces from multiple industries. First, the overall growth of the global analytical instrumentation market, particularly in environmental monitoring, food safety testing, life sciences research, and pharmaceutical quality control, provides a robust foundation for increased demand for high-resolution separation consumables. Stricter environmental regulations in major economies around the world have heightened requirements for air quality, drinking water, and soil pollution analysis, directly boosting the need for high-performance chromatographic columns. Similarly, the frequent occurrence of food safety incidents and rising consumer expectations for detection of trace pesticides, additives, and contaminants have significantly increased demand for capillary GC columns in food and agricultural testing. In the pharmaceutical sector, continuous expansion—especially in biopharmaceuticals and advanced formulations—has solidified the role of high-efficiency gas chromatography systems and capillary columns in both research and quality control workflows. Emerging markets such as China, India, and Southeast Asia are also investing heavily in analytical infrastructure and technical adoption, cultivating large potential customer bases and expanding market opportunity. Advances in chromatography technology such as Fourier transform interfaces, automated sampling, low dead-volume connectors, and improved stationary phase materials continue to introduce new growth vectors for the industry.

However, the market also faces an array of challenges and risks. On the supply side, the production of high-quality capillary GC columns demands precision control of internal diameters, uniform coating technologies, and stringent quality inspection systems, creating high entry barriers for smaller manufacturers and concentrating market share among established international brands. Additionally, global supply chain fluctuations and rising raw material costs (e.g., high-purity silica capillaries and stationary phase precursors) could increase manufacturing expenses, placing pressure on price-sensitive customers. Competitive intensity and product substitution represent further risks to industry profitability. Some low-cost producers reduce manufacturing complexity or compromise on testing standards to compete on price, particularly in certain regional markets, which can erode market share for reputable suppliers and force them into price competition or increased service investments, impacting margins. Furthermore, as a consumable product with a relatively short lifecycle and fixed replacement intervals, capillary columns make long-term customer retention through

one-off sales difficult, necessitating greater investment in pre-sales technical support, after-sales service, and brand development.

Downstream demand trends indicate a shift toward higher end and specialized usage across application segments. In pharmaceutical analysis, growing requirements for complex macromolecule separation and trace impurity profiling drive demand for columns with high theoretical plate count, minimal dead volume, and superior thermal stability, expanding the “premium columns” market. Environmental and food testing segments are seeing increased demand for rapid, automated sample preparation solutions as regulatory sensitivity thresholds tighten. In clinical diagnostics, growing research into volatile organic compounds (VOCs) and breath analysis fuels demand in emerging clinical niches. As chromatographic systems increasingly integrate with mass spectrometry (GC-MS, GC-MS/MS), the performance of capillary GC columns—as the front-end component of the analytical pipeline—has a direct impact on overall data quality. This trend encourages users to favor mature technologies and reliable supplier brands. Overall, downstream demand is not only expanding in scale but also demanding higher product quality, performance metrics, supply stability, and service support, driving further optimization and upgrading of the industry’s supply chain.

This report studies the global Capillary Chromatography Column production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Capillary Chromatography Column and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Capillary Chromatography Column that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Capillary Chromatography Column total production and demand, 2021-2032, (Units)

Global Capillary Chromatography Column total production value, 2021-2032, (USD Million)

Global Capillary Chromatography Column production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Capillary Chromatography Column consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Capillary Chromatography Column domestic production, consumption, key domestic manufacturers and share

Global Capillary Chromatography Column production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Capillary Chromatography Column production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Capillary Chromatography Column production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Capillary Chromatography Column market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Agilent Technologies, Shimadzu Corporation, Thermo Fisher Scientific, Restek Corporation, Trajan Scientific and Medical, Ohio Valley Specialty, VICI Valco Instruments, SGE Analytical Science (Trajan), GL Sciences, Phenomenex, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Capillary Chromatography Column market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Capillary Chromatography Column Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Capillary Chromatography Column Market, Segmentation by Type:

Hollow Column

Packed Capillary Column

Micropacked Column

Others

#### Global Capillary Chromatography Column Market, Segmentation by Column Material:

Fused Silica Capillary Column

Metal Capillary Column

Glass Capillary Column

#### Global Capillary Chromatography Column Market, Segmentation by Column Structure:

Wall-Coated Open Tubular Column

Porous Layer Open Tubular Column

Support-Coated Open Tubular Column

#### Global Capillary Chromatography Column Market, Segmentation by Column Length:

Short Capillary Column

Medium-length Capillary Column

Long Capillary Column

#### Global Capillary Chromatography Column Market, Segmentation by Application:

Environmental Monitoring

Pharmacy

Petrochemical Industry

Others

#### Companies Profiled:

Agilent Technologies

Shimadzu Corporation

Thermo Fisher Scientific

Restek Corporation

Trajan Scientific and Medical

Ohio Valley Specialty

VICI Valco Instruments

SGE Analytical Science (Trajan)

GL Sciences

Phenomenex

Teknokroma

MEGA S.r.l.

Buck Scientific

GOW-MAC Instrument

Chrom Tech

Dikma Technologies

GS-Tek

J&K Scientific

Abel Industries

Caplugs Evergreen

MilliporeSigma

Nacalai Tesque

Osaka Soda (Shodex)

Senshu Scientific

Interchim S.A.

Macherey?Nagel

Frontier Laboratories

SRI Instruments

Chromatotec

Scion Instruments

Dani Instruments

Falcon Analytical

Sepax Technologies

Welch Materials

Dikma (China)

Key Questions Answered:

1. How big is the global Capillary Chromatography Column market?
2. What is the demand of the global Capillary Chromatography Column market?
3. What is the year over year growth of the global Capillary Chromatography Column market?
4. What is the production and production value of the global Capillary Chromatography Column market?
5. Who are the key producers in the global Capillary Chromatography Column market?
6. What are the growth factors driving the market demand?

## Contents

### 1 SUPPLY SUMMARY

- 1.1 Capillary Chromatography Column Introduction
- 1.2 World Capillary Chromatography Column Supply & Forecast
  - 1.2.1 World Capillary Chromatography Column Production Value (2021 & 2025 & 2032)
  - 1.2.2 World Capillary Chromatography Column Production (2021-2032)
  - 1.2.3 World Capillary Chromatography Column Pricing Trends (2021-2032)
- 1.3 World Capillary Chromatography Column Production by Region (Based on Production Site)
  - 1.3.1 World Capillary Chromatography Column Production Value by Region (2021-2032)
  - 1.3.2 World Capillary Chromatography Column Production by Region (2021-2032)
  - 1.3.3 World Capillary Chromatography Column Average Price by Region (2021-2032)
  - 1.3.4 North America Capillary Chromatography Column Production (2021-2032)
  - 1.3.5 Europe Capillary Chromatography Column Production (2021-2032)
  - 1.3.6 China Capillary Chromatography Column Production (2021-2032)
  - 1.3.7 Japan Capillary Chromatography Column Production (2021-2032)
  - 1.3.8 Latin America Capillary Chromatography Column Production (2021-2032)
  - 1.3.9 Middle East & Africa Capillary Chromatography Column Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
  - 1.4.1 Capillary Chromatography Column Market Drivers
  - 1.4.2 Factors Affecting Demand
  - 1.4.3 Capillary Chromatography Column Major Market Trends

### 2 DEMAND SUMMARY

- 2.1 World Capillary Chromatography Column Demand (2021-2032)
- 2.2 World Capillary Chromatography Column Consumption by Region
  - 2.2.1 World Capillary Chromatography Column Consumption by Region (2021-2026)
  - 2.2.2 World Capillary Chromatography Column Consumption Forecast by Region (2027-2032)
- 2.3 United States Capillary Chromatography Column Consumption (2021-2032)
- 2.4 China Capillary Chromatography Column Consumption (2021-2032)
- 2.5 Europe Capillary Chromatography Column Consumption (2021-2032)
- 2.6 Japan Capillary Chromatography Column Consumption (2021-2032)
- 2.7 South Korea Capillary Chromatography Column Consumption (2021-2032)

2.8 ASEAN Capillary Chromatography Column Consumption (2021-2032)

2.9 India Capillary Chromatography Column Consumption (2021-2032)

### **3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS**

3.1 World Capillary Chromatography Column Production Value by Manufacturer (2021-2026)

3.2 World Capillary Chromatography Column Production by Manufacturer (2021-2026)

3.3 World Capillary Chromatography Column Average Price by Manufacturer (2021-2026)

3.4 Capillary Chromatography Column Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global Capillary Chromatography Column Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for Capillary Chromatography Column in 2025

3.5.3 Global Concentration Ratios (CR8) for Capillary Chromatography Column in 2025

3.6 Capillary Chromatography Column Market: Overall Company Footprint Analysis

3.6.1 Capillary Chromatography Column Market: Region Footprint

3.6.2 Capillary Chromatography Column Market: Company Product Type Footprint

3.6.3 Capillary Chromatography Column Market: Company Product Application

Footprint

3.7 Competitive Environment

3.7.1 Historical Structure of the Industry

3.7.2 Barriers of Market Entry

3.7.3 Factors of Competition

3.8 New Entrant and Capacity Expansion Plans

3.9 Mergers, Acquisition, Agreements, and Collaborations

### **4 UNITED STATES VS CHINA VS REST OF THE WORLD**

4.1 United States VS China: Capillary Chromatography Column Production Value Comparison

4.1.1 United States VS China: Capillary Chromatography Column Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Capillary Chromatography Column Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Capillary Chromatography Column Production Comparison

4.2.1 United States VS China: Capillary Chromatography Column Production

Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Capillary Chromatography Column Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Capillary Chromatography Column Consumption Comparison

4.3.1 United States VS China: Capillary Chromatography Column Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Capillary Chromatography Column Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Capillary Chromatography Column Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Capillary Chromatography Column Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Capillary Chromatography Column Production Value (2021-2026)

4.4.3 United States Based Manufacturers Capillary Chromatography Column Production (2021-2026)

4.5 China Based Capillary Chromatography Column Manufacturers and Market Share

4.5.1 China Based Capillary Chromatography Column Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Capillary Chromatography Column Production Value (2021-2026)

4.5.3 China Based Manufacturers Capillary Chromatography Column Production (2021-2026)

4.6 Rest of World Based Capillary Chromatography Column Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Capillary Chromatography Column Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Capillary Chromatography Column Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Capillary Chromatography Column Production (2021-2026)

## **5 MARKET ANALYSIS BY TYPE**

5.1 World Capillary Chromatography Column Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Hollow Column

5.2.2 Packed Capillary Column

5.2.3 Micropacked Column

5.2.4 Others

5.3 Market Segment by Type

5.3.1 World Capillary Chromatography Column Production by Type (2021-2032)

5.3.2 World Capillary Chromatography Column Production Value by Type (2021-2032)

5.3.3 World Capillary Chromatography Column Average Price by Type (2021-2032)

## **6 MARKET ANALYSIS BY COLUMN MATERIAL**

6.1 World Capillary Chromatography Column Market Size Overview by Column Material: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Column Material

6.2.1 Fused Silica Capillary Column

6.2.2 Metal Capillary Column

6.2.3 Glass Capillary Column

6.3 Market Segment by Column Material

6.3.1 World Capillary Chromatography Column Production by Column Material (2021-2032)

6.3.2 World Capillary Chromatography Column Production Value by Column Material (2021-2032)

6.3.3 World Capillary Chromatography Column Average Price by Column Material (2021-2032)

## **7 MARKET ANALYSIS BY COLUMN STRUCTURE**

7.1 World Capillary Chromatography Column Market Size Overview by Column Structure: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Column Structure

7.2.1 Wall-Coated Open Tubular Column

7.2.2 Porous Layer Open Tubular Column

7.2.3 Support-Coated Open Tubular Column

7.3 Market Segment by Column Structure

7.3.1 World Capillary Chromatography Column Production by Column Structure (2021-2032)

7.3.2 World Capillary Chromatography Column Production Value by Column Structure (2021-2032)

7.3.3 World Capillary Chromatography Column Average Price by Column Structure (2021-2032)

## **8 MARKET ANALYSIS BY COLUMN LENGTH**

8.1 World Capillary Chromatography Column Market Size Overview by Column Length: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Column Length

8.2.1 Short Capillary Column

8.2.2 Medium-length Capillary Column

8.2.3 Long Capillary Column

8.3 Market Segment by Column Length

8.3.1 World Capillary Chromatography Column Production by Column Length (2021-2032)

8.3.2 World Capillary Chromatography Column Production Value by Column Length (2021-2032)

8.3.3 World Capillary Chromatography Column Average Price by Column Length (2021-2032)

## **9 MARKET ANALYSIS BY APPLICATION**

9.1 World Capillary Chromatography Column Market Size Overview by Application: 2021 VS 2025 VS 2032

9.2 Segment Introduction by Application

9.2.1 Environmental Monitoring

9.2.2 Pharmacy

9.2.3 Petrochemical Industry

9.2.4 Others

9.3 Market Segment by Application

9.3.1 World Capillary Chromatography Column Production by Application (2021-2032)

9.3.2 World Capillary Chromatography Column Production Value by Application (2021-2032)

9.3.3 World Capillary Chromatography Column Average Price by Application (2021-2032)

## **10 COMPANY PROFILES**

10.1 Agilent Technologies

10.1.1 Agilent Technologies Details

10.1.2 Agilent Technologies Major Business

10.1.3 Agilent Technologies Capillary Chromatography Column Product and Services

- 10.1.4 Agilent Technologies Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.1.5 Agilent Technologies Recent Developments/Updates
- 10.1.6 Agilent Technologies Competitive Strengths & Weaknesses
- 10.2 Shimadzu Corporation
  - 10.2.1 Shimadzu Corporation Details
  - 10.2.2 Shimadzu Corporation Major Business
  - 10.2.3 Shimadzu Corporation Capillary Chromatography Column Product and Services
  - 10.2.4 Shimadzu Corporation Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.2.5 Shimadzu Corporation Recent Developments/Updates
  - 10.2.6 Shimadzu Corporation Competitive Strengths & Weaknesses
- 10.3 Thermo Fisher Scientific
  - 10.3.1 Thermo Fisher Scientific Details
  - 10.3.2 Thermo Fisher Scientific Major Business
  - 10.3.3 Thermo Fisher Scientific Capillary Chromatography Column Product and Services
  - 10.3.4 Thermo Fisher Scientific Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.3.5 Thermo Fisher Scientific Recent Developments/Updates
  - 10.3.6 Thermo Fisher Scientific Competitive Strengths & Weaknesses
- 10.4 Restek Corporation
  - 10.4.1 Restek Corporation Details
  - 10.4.2 Restek Corporation Major Business
  - 10.4.3 Restek Corporation Capillary Chromatography Column Product and Services
  - 10.4.4 Restek Corporation Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.4.5 Restek Corporation Recent Developments/Updates
  - 10.4.6 Restek Corporation Competitive Strengths & Weaknesses
- 10.5 Trajan Scientific and Medical
  - 10.5.1 Trajan Scientific and Medical Details
  - 10.5.2 Trajan Scientific and Medical Major Business
  - 10.5.3 Trajan Scientific and Medical Capillary Chromatography Column Product and Services
  - 10.5.4 Trajan Scientific and Medical Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.5.5 Trajan Scientific and Medical Recent Developments/Updates
  - 10.5.6 Trajan Scientific and Medical Competitive Strengths & Weaknesses
- 10.6 Ohio Valley Specialty

- 10.6.1 Ohio Valley Specialty Details
- 10.6.2 Ohio Valley Specialty Major Business
- 10.6.3 Ohio Valley Specialty Capillary Chromatography Column Product and Services
- 10.6.4 Ohio Valley Specialty Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.6.5 Ohio Valley Specialty Recent Developments/Updates
- 10.6.6 Ohio Valley Specialty Competitive Strengths & Weaknesses
- 10.7 VICI Valco Instruments
  - 10.7.1 VICI Valco Instruments Details
  - 10.7.2 VICI Valco Instruments Major Business
  - 10.7.3 VICI Valco Instruments Capillary Chromatography Column Product and Services
  - 10.7.4 VICI Valco Instruments Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.7.5 VICI Valco Instruments Recent Developments/Updates
  - 10.7.6 VICI Valco Instruments Competitive Strengths & Weaknesses
- 10.8 SGE Analytical Science (Trajan)
  - 10.8.1 SGE Analytical Science (Trajan) Details
  - 10.8.2 SGE Analytical Science (Trajan) Major Business
  - 10.8.3 SGE Analytical Science (Trajan) Capillary Chromatography Column Product and Services
  - 10.8.4 SGE Analytical Science (Trajan) Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.8.5 SGE Analytical Science (Trajan) Recent Developments/Updates
  - 10.8.6 SGE Analytical Science (Trajan) Competitive Strengths & Weaknesses
- 10.9 GL Sciences
  - 10.9.1 GL Sciences Details
  - 10.9.2 GL Sciences Major Business
  - 10.9.3 GL Sciences Capillary Chromatography Column Product and Services
  - 10.9.4 GL Sciences Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.9.5 GL Sciences Recent Developments/Updates
  - 10.9.6 GL Sciences Competitive Strengths & Weaknesses
- 10.10 Phenomenex
  - 10.10.1 Phenomenex Details
  - 10.10.2 Phenomenex Major Business
  - 10.10.3 Phenomenex Capillary Chromatography Column Product and Services
  - 10.10.4 Phenomenex Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 10.10.5 Phenomenex Recent Developments/Updates
- 10.10.6 Phenomenex Competitive Strengths & Weaknesses
- 10.11 Teknokroma
  - 10.11.1 Teknokroma Details
  - 10.11.2 Teknokroma Major Business
  - 10.11.3 Teknokroma Capillary Chromatography Column Product and Services
  - 10.11.4 Teknokroma Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.11.5 Teknokroma Recent Developments/Updates
  - 10.11.6 Teknokroma Competitive Strengths & Weaknesses
- 10.12 MEGA S.r.l.
  - 10.12.1 MEGA S.r.l. Details
  - 10.12.2 MEGA S.r.l. Major Business
  - 10.12.3 MEGA S.r.l. Capillary Chromatography Column Product and Services
  - 10.12.4 MEGA S.r.l. Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.12.5 MEGA S.r.l. Recent Developments/Updates
  - 10.12.6 MEGA S.r.l. Competitive Strengths & Weaknesses
- 10.13 Buck Scientific
  - 10.13.1 Buck Scientific Details
  - 10.13.2 Buck Scientific Major Business
  - 10.13.3 Buck Scientific Capillary Chromatography Column Product and Services
  - 10.13.4 Buck Scientific Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.13.5 Buck Scientific Recent Developments/Updates
  - 10.13.6 Buck Scientific Competitive Strengths & Weaknesses
- 10.14 GOW-MAC Instrument
  - 10.14.1 GOW-MAC Instrument Details
  - 10.14.2 GOW-MAC Instrument Major Business
  - 10.14.3 GOW-MAC Instrument Capillary Chromatography Column Product and Services
  - 10.14.4 GOW-MAC Instrument Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.14.5 GOW-MAC Instrument Recent Developments/Updates
  - 10.14.6 GOW-MAC Instrument Competitive Strengths & Weaknesses
- 10.15 Chrom Tech
  - 10.15.1 Chrom Tech Details
  - 10.15.2 Chrom Tech Major Business
  - 10.15.3 Chrom Tech Capillary Chromatography Column Product and Services

10.15.4 Chrom Tech Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.15.5 Chrom Tech Recent Developments/Updates

10.15.6 Chrom Tech Competitive Strengths & Weaknesses

10.16 Dikma Technologies

10.16.1 Dikma Technologies Details

10.16.2 Dikma Technologies Major Business

10.16.3 Dikma Technologies Capillary Chromatography Column Product and Services

10.16.4 Dikma Technologies Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.16.5 Dikma Technologies Recent Developments/Updates

10.16.6 Dikma Technologies Competitive Strengths & Weaknesses

10.17 GS-Tek

10.17.1 GS-Tek Details

10.17.2 GS-Tek Major Business

10.17.3 GS-Tek Capillary Chromatography Column Product and Services

10.17.4 GS-Tek Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.17.5 GS-Tek Recent Developments/Updates

10.17.6 GS-Tek Competitive Strengths & Weaknesses

10.18 J&K Scientific

10.18.1 J&K Scientific Details

10.18.2 J&K Scientific Major Business

10.18.3 J&K Scientific Capillary Chromatography Column Product and Services

10.18.4 J&K Scientific Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.18.5 J&K Scientific Recent Developments/Updates

10.18.6 J&K Scientific Competitive Strengths & Weaknesses

10.19 Abel Industries

10.19.1 Abel Industries Details

10.19.2 Abel Industries Major Business

10.19.3 Abel Industries Capillary Chromatography Column Product and Services

10.19.4 Abel Industries Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.19.5 Abel Industries Recent Developments/Updates

10.19.6 Abel Industries Competitive Strengths & Weaknesses

10.20 Caplugs Evergreen

10.20.1 Caplugs Evergreen Details

10.20.2 Caplugs Evergreen Major Business

- 10.20.3 Caplugs Evergreen Capillary Chromatography Column Product and Services
- 10.20.4 Caplugs Evergreen Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.20.5 Caplugs Evergreen Recent Developments/Updates
- 10.20.6 Caplugs Evergreen Competitive Strengths & Weaknesses
- 10.21 MilliporeSigma
  - 10.21.1 MilliporeSigma Details
  - 10.21.2 MilliporeSigma Major Business
  - 10.21.3 MilliporeSigma Capillary Chromatography Column Product and Services
  - 10.21.4 MilliporeSigma Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.21.5 MilliporeSigma Recent Developments/Updates
  - 10.21.6 MilliporeSigma Competitive Strengths & Weaknesses
- 10.22 Nacalai Tesque
  - 10.22.1 Nacalai Tesque Details
  - 10.22.2 Nacalai Tesque Major Business
  - 10.22.3 Nacalai Tesque Capillary Chromatography Column Product and Services
  - 10.22.4 Nacalai Tesque Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.22.5 Nacalai Tesque Recent Developments/Updates
  - 10.22.6 Nacalai Tesque Competitive Strengths & Weaknesses
- 10.23 Osaka Soda (Shodex)
  - 10.23.1 Osaka Soda (Shodex) Details
  - 10.23.2 Osaka Soda (Shodex) Major Business
  - 10.23.3 Osaka Soda (Shodex) Capillary Chromatography Column Product and Services
  - 10.23.4 Osaka Soda (Shodex) Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.23.5 Osaka Soda (Shodex) Recent Developments/Updates
  - 10.23.6 Osaka Soda (Shodex) Competitive Strengths & Weaknesses
- 10.24 Senshu Scientific
  - 10.24.1 Senshu Scientific Details
  - 10.24.2 Senshu Scientific Major Business
  - 10.24.3 Senshu Scientific Capillary Chromatography Column Product and Services
  - 10.24.4 Senshu Scientific Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.24.5 Senshu Scientific Recent Developments/Updates
  - 10.24.6 Senshu Scientific Competitive Strengths & Weaknesses
- 10.25 Interchim S.A.

- 10.25.1 Interchim S.A. Details
- 10.25.2 Interchim S.A. Major Business
- 10.25.3 Interchim S.A. Capillary Chromatography Column Product and Services
- 10.25.4 Interchim S.A. Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.25.5 Interchim S.A. Recent Developments/Updates
- 10.25.6 Interchim S.A. Competitive Strengths & Weaknesses
- 10.26 Macherey?Nagel
- 10.26.1 Macherey?Nagel Details
- 10.26.2 Macherey?Nagel Major Business
- 10.26.3 Macherey?Nagel Capillary Chromatography Column Product and Services
- 10.26.4 Macherey?Nagel Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.26.5 Macherey?Nagel Recent Developments/Updates
- 10.26.6 Macherey?Nagel Competitive Strengths & Weaknesses
- 10.27 Frontier Laboratories
- 10.27.1 Frontier Laboratories Details
- 10.27.2 Frontier Laboratories Major Business
- 10.27.3 Frontier Laboratories Capillary Chromatography Column Product and Services
- 10.27.4 Frontier Laboratories Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.27.5 Frontier Laboratories Recent Developments/Updates
- 10.27.6 Frontier Laboratories Competitive Strengths & Weaknesses
- 10.28 SRI Instruments
- 10.28.1 SRI Instruments Details
- 10.28.2 SRI Instruments Major Business
- 10.28.3 SRI Instruments Capillary Chromatography Column Product and Services
- 10.28.4 SRI Instruments Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.28.5 SRI Instruments Recent Developments/Updates
- 10.28.6 SRI Instruments Competitive Strengths & Weaknesses
- 10.29 Chromatotec
- 10.29.1 Chromatotec Details
- 10.29.2 Chromatotec Major Business
- 10.29.3 Chromatotec Capillary Chromatography Column Product and Services
- 10.29.4 Chromatotec Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.29.5 Chromatotec Recent Developments/Updates
- 10.29.6 Chromatotec Competitive Strengths & Weaknesses

### 10.30 Scion Instruments

10.30.1 Scion Instruments Details

10.30.2 Scion Instruments Major Business

10.30.3 Scion Instruments Capillary Chromatography Column Product and Services

10.30.4 Scion Instruments Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.30.5 Scion Instruments Recent Developments/Updates

10.30.6 Scion Instruments Competitive Strengths & Weaknesses

### 10.31 Dani Instruments

10.31.1 Dani Instruments Details

10.31.2 Dani Instruments Major Business

10.31.3 Dani Instruments Capillary Chromatography Column Product and Services

10.31.4 Dani Instruments Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.31.5 Dani Instruments Recent Developments/Updates

10.31.6 Dani Instruments Competitive Strengths & Weaknesses

### 10.32 Falcon Analytical

10.32.1 Falcon Analytical Details

10.32.2 Falcon Analytical Major Business

10.32.3 Falcon Analytical Capillary Chromatography Column Product and Services

10.32.4 Falcon Analytical Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.32.5 Falcon Analytical Recent Developments/Updates

10.32.6 Falcon Analytical Competitive Strengths & Weaknesses

### 10.33 Sepax Technologies

10.33.1 Sepax Technologies Details

10.33.2 Sepax Technologies Major Business

10.33.3 Sepax Technologies Capillary Chromatography Column Product and Services

10.33.4 Sepax Technologies Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.33.5 Sepax Technologies Recent Developments/Updates

10.33.6 Sepax Technologies Competitive Strengths & Weaknesses

### 10.34 Welch Materials

10.34.1 Welch Materials Details

10.34.2 Welch Materials Major Business

10.34.3 Welch Materials Capillary Chromatography Column Product and Services

10.34.4 Welch Materials Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.34.5 Welch Materials Recent Developments/Updates

- 10.34.6 Welch Materials Competitive Strengths & Weaknesses
- 10.35 Dikma (China)
  - 10.35.1 Dikma (China) Details
  - 10.35.2 Dikma (China) Major Business
  - 10.35.3 Dikma (China) Capillary Chromatography Column Product and Services
  - 10.35.4 Dikma (China) Capillary Chromatography Column Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.35.5 Dikma (China) Recent Developments/Updates
  - 10.35.6 Dikma (China) Competitive Strengths & Weaknesses

## **11 INDUSTRY CHAIN ANALYSIS**

- 11.1 Capillary Chromatography Column Industry Chain
- 11.2 Capillary Chromatography Column Upstream Analysis
  - 11.2.1 Capillary Chromatography Column Core Raw Materials
  - 11.2.2 Main Manufacturers of Capillary Chromatography Column Core Raw Materials
- 11.3 Midstream Analysis
- 11.4 Downstream Analysis
- 11.5 Capillary Chromatography Column Production Mode
- 11.6 Capillary Chromatography Column Procurement Model
- 11.7 Capillary Chromatography Column Industry Sales Model and Sales Channels
  - 11.7.1 Capillary Chromatography Column Sales Model
  - 11.7.2 Capillary Chromatography Column Typical Distributors

## **12 RESEARCH FINDINGS AND CONCLUSION**

## **13 APPENDIX**

- 13.1 Methodology
- 13.2 Research Process and Data Source
- 13.3 Disclaimer

## List Of Tables

### LIST OF TABLES

Table 1. World Capillary Chromatography Column Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Capillary Chromatography Column Production Value by Region (2021-2026) & (USD Million)

Table 3. World Capillary Chromatography Column Production Value by Region (2027-2032) & (USD Million)

Table 4. World Capillary Chromatography Column Production Value Market Share by Region (2021-2026)

Table 5. World Capillary Chromatography Column Production Value Market Share by Region (2027-2032)

Table 6. World Capillary Chromatography Column Production by Region (2021-2026) & (Units)

Table 7. World Capillary Chromatography Column Production by Region (2027-2032) & (Units)

Table 8. World Capillary Chromatography Column Production Market Share by Region (2021-2026)

Table 9. World Capillary Chromatography Column Production Market Share by Region (2027-2032)

Table 10. World Capillary Chromatography Column Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World Capillary Chromatography Column Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. Capillary Chromatography Column Major Market Trends

Table 13. World Capillary Chromatography Column Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)

Table 14. World Capillary Chromatography Column Consumption by Region (2021-2026) & (Units)

Table 15. World Capillary Chromatography Column Consumption Forecast by Region (2027-2032) & (Units)

Table 16. World Capillary Chromatography Column Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Capillary Chromatography Column Producers in 2025

Table 18. World Capillary Chromatography Column Production by Manufacturer (2021-2026) & (Units)

Table 19. Production Market Share of Key Capillary Chromatography Column Producers in 2025

Table 20. World Capillary Chromatography Column Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global Capillary Chromatography Column Company Evaluation Quadrant

Table 22. World Capillary Chromatography Column Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Capillary Chromatography Column Production Site of Key Manufacturer

Table 24. Capillary Chromatography Column Market: Company Product Type Footprint

Table 25. Capillary Chromatography Column Market: Company Product Application Footprint

Table 26. Capillary Chromatography Column Competitive Factors

Table 27. Capillary Chromatography Column New Entrant and Capacity Expansion Plans

Table 28. Capillary Chromatography Column Mergers & Acquisitions Activity

Table 29. United States VS China Capillary Chromatography Column Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Capillary Chromatography Column Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China Capillary Chromatography Column Consumption Comparison, (2021 & 2025 & 2032) & (Units)

Table 32. United States Based Capillary Chromatography Column Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Capillary Chromatography Column Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Capillary Chromatography Column Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Capillary Chromatography Column Production (2021-2026) & (Units)

Table 36. United States Based Manufacturers Capillary Chromatography Column Production Market Share (2021-2026)

Table 37. China Based Capillary Chromatography Column Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Capillary Chromatography Column Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Capillary Chromatography Column Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Capillary Chromatography Column Production,

(2021-2026) & (Units)

Table 41. China Based Manufacturers Capillary Chromatography Column Production Market Share (2021-2026)

Table 42. Rest of World Based Capillary Chromatography Column Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Capillary Chromatography Column Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Capillary Chromatography Column Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Capillary Chromatography Column Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers Capillary Chromatography Column Production Market Share (2021-2026)

Table 47. World Capillary Chromatography Column Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Capillary Chromatography Column Production by Type (2021-2026) & (Units)

Table 49. World Capillary Chromatography Column Production by Type (2027-2032) & (Units)

Table 50. World Capillary Chromatography Column Production Value by Type (2021-2026) & (USD Million)

Table 51. World Capillary Chromatography Column Production Value by Type (2027-2032) & (USD Million)

Table 52. World Capillary Chromatography Column Average Price by Type (2021-2026) & (US\$/Unit)

Table 53. World Capillary Chromatography Column Average Price by Type (2027-2032) & (US\$/Unit)

Table 54. World Capillary Chromatography Column Production Value by Column Material, (USD Million), 2021 & 2025 & 2032

Table 55. World Capillary Chromatography Column Production by Column Material (2021-2026) & (Units)

Table 56. World Capillary Chromatography Column Production by Column Material (2027-2032) & (Units)

Table 57. World Capillary Chromatography Column Production Value by Column Material (2021-2026) & (USD Million)

Table 58. World Capillary Chromatography Column Production Value by Column Material (2027-2032) & (USD Million)

Table 59. World Capillary Chromatography Column Average Price by Column Material (2021-2026) & (US\$/Unit)

Table 60. World Capillary Chromatography Column Average Price by Column Material (2027-2032) & (US\$/Unit)

Table 61. World Capillary Chromatography Column Production Value by Column Structure, (USD Million), 2021 & 2025 & 2032

Table 62. World Capillary Chromatography Column Production by Column Structure (2021-2026) & (Units)

Table 63. World Capillary Chromatography Column Production by Column Structure (2027-2032) & (Units)

Table 64. World Capillary Chromatography Column Production Value by Column Structure (2021-2026) & (USD Million)

Table 65. World Capillary Chromatography Column Production Value by Column Structure (2027-2032) & (USD Million)

Table 66. World Capillary Chromatography Column Average Price by Column Structure (2021-2026) & (US\$/Unit)

Table 67. World Capillary Chromatography Column Average Price by Column Structure (2027-2032) & (US\$/Unit)

Table 68. World Capillary Chromatography Column Production Value by Column Length, (USD Million), 2021 & 2025 & 2032

Table 69. World Capillary Chromatography Column Production by Column Length (2021-2026) & (Units)

Table 70. World Capillary Chromatography Column Production by Column Length (2027-2032) & (Units)

Table 71. World Capillary Chromatography Column Production Value by Column Length (2021-2026) & (USD Million)

Table 72. World Capillary Chromatography Column Production Value by Column Length (2027-2032) & (USD Million)

Table 73. World Capillary Chromatography Column Average Price by Column Length (2021-2026) & (US\$/Unit)

Table 74. World Capillary Chromatography Column Average Price by Column Length (2027-2032) & (US\$/Unit)

Table 75. World Capillary Chromatography Column Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 76. World Capillary Chromatography Column Production by Application (2021-2026) & (Units)

Table 77. World Capillary Chromatography Column Production by Application (2027-2032) & (Units)

Table 78. World Capillary Chromatography Column Production Value by Application (2021-2026) & (USD Million)

Table 79. World Capillary Chromatography Column Production Value by Application

(2027-2032) & (USD Million)

Table 80. World Capillary Chromatography Column Average Price by Application (2021-2026) & (US\$/Unit)

Table 81. World Capillary Chromatography Column Average Price by Application (2027-2032) & (US\$/Unit)

Table 82. Agilent Technologies Basic Information, Manufacturing Base and Competitors

Table 83. Agilent Technologies Major Business

Table 84. Agilent Technologies Capillary Chromatography Column Product and Services

Table 85. Agilent Technologies Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 86. Agilent Technologies Recent Developments/Updates

Table 87. Agilent Technologies Competitive Strengths & Weaknesses

Table 88. Shimadzu Corporation Basic Information, Manufacturing Base and Competitors

Table 89. Shimadzu Corporation Major Business

Table 90. Shimadzu Corporation Capillary Chromatography Column Product and Services

Table 91. Shimadzu Corporation Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 92. Shimadzu Corporation Recent Developments/Updates

Table 93. Shimadzu Corporation Competitive Strengths & Weaknesses

Table 94. Thermo Fisher Scientific Basic Information, Manufacturing Base and Competitors

Table 95. Thermo Fisher Scientific Major Business

Table 96. Thermo Fisher Scientific Capillary Chromatography Column Product and Services

Table 97. Thermo Fisher Scientific Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 98. Thermo Fisher Scientific Recent Developments/Updates

Table 99. Thermo Fisher Scientific Competitive Strengths & Weaknesses

Table 100. Restek Corporation Basic Information, Manufacturing Base and Competitors

Table 101. Restek Corporation Major Business

Table 102. Restek Corporation Capillary Chromatography Column Product and Services

Table 103. Restek Corporation Capillary Chromatography Column Production (Units),

Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 104. Restek Corporation Recent Developments/Updates

Table 105. Restek Corporation Competitive Strengths & Weaknesses

Table 106. Trajan Scientific and Medical Basic Information, Manufacturing Base and Competitors

Table 107. Trajan Scientific and Medical Major Business

Table 108. Trajan Scientific and Medical Capillary Chromatography Column Product and Services

Table 109. Trajan Scientific and Medical Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 110. Trajan Scientific and Medical Recent Developments/Updates

Table 111. Trajan Scientific and Medical Competitive Strengths & Weaknesses

Table 112. Ohio Valley Specialty Basic Information, Manufacturing Base and Competitors

Table 113. Ohio Valley Specialty Major Business

Table 114. Ohio Valley Specialty Capillary Chromatography Column Product and Services

Table 115. Ohio Valley Specialty Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 116. Ohio Valley Specialty Recent Developments/Updates

Table 117. Ohio Valley Specialty Competitive Strengths & Weaknesses

Table 118. VICI Valco Instruments Basic Information, Manufacturing Base and Competitors

Table 119. VICI Valco Instruments Major Business

Table 120. VICI Valco Instruments Capillary Chromatography Column Product and Services

Table 121. VICI Valco Instruments Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 122. VICI Valco Instruments Recent Developments/Updates

Table 123. VICI Valco Instruments Competitive Strengths & Weaknesses

Table 124. SGE Analytical Science (Trajan) Basic Information, Manufacturing Base and Competitors

Table 125. SGE Analytical Science (Trajan) Major Business

Table 126. SGE Analytical Science (Trajan) Capillary Chromatography Column Product and Services

Table 127. SGE Analytical Science (Trajan) Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 128. SGE Analytical Science (Trajan) Recent Developments/Updates

Table 129. SGE Analytical Science (Trajan) Competitive Strengths & Weaknesses

Table 130. GL Sciences Basic Information, Manufacturing Base and Competitors

Table 131. GL Sciences Major Business

Table 132. GL Sciences Capillary Chromatography Column Product and Services

Table 133. GL Sciences Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 134. GL Sciences Recent Developments/Updates

Table 135. GL Sciences Competitive Strengths & Weaknesses

Table 136. Phenomenex Basic Information, Manufacturing Base and Competitors

Table 137. Phenomenex Major Business

Table 138. Phenomenex Capillary Chromatography Column Product and Services

Table 139. Phenomenex Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 140. Phenomenex Recent Developments/Updates

Table 141. Phenomenex Competitive Strengths & Weaknesses

Table 142. Teknokroma Basic Information, Manufacturing Base and Competitors

Table 143. Teknokroma Major Business

Table 144. Teknokroma Capillary Chromatography Column Product and Services

Table 145. Teknokroma Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 146. Teknokroma Recent Developments/Updates

Table 147. Teknokroma Competitive Strengths & Weaknesses

Table 148. MEGA S.r.l. Basic Information, Manufacturing Base and Competitors

Table 149. MEGA S.r.l. Major Business

Table 150. MEGA S.r.l. Capillary Chromatography Column Product and Services

Table 151. MEGA S.r.l. Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 152. MEGA S.r.l. Recent Developments/Updates

Table 153. MEGA S.r.l. Competitive Strengths & Weaknesses

Table 154. Buck Scientific Basic Information, Manufacturing Base and Competitors

Table 155. Buck Scientific Major Business

Table 156. Buck Scientific Capillary Chromatography Column Product and Services

Table 157. Buck Scientific Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 158. Buck Scientific Recent Developments/Updates

Table 159. Buck Scientific Competitive Strengths & Weaknesses

Table 160. GOW-MAC Instrument Basic Information, Manufacturing Base and Competitors

Table 161. GOW-MAC Instrument Major Business

Table 162. GOW-MAC Instrument Capillary Chromatography Column Product and Services

Table 163. GOW-MAC Instrument Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 164. GOW-MAC Instrument Recent Developments/Updates

Table 165. GOW-MAC Instrument Competitive Strengths & Weaknesses

Table 166. Chrom Tech Basic Information, Manufacturing Base and Competitors

Table 167. Chrom Tech Major Business

Table 168. Chrom Tech Capillary Chromatography Column Product and Services

Table 169. Chrom Tech Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 170. Chrom Tech Recent Developments/Updates

Table 171. Chrom Tech Competitive Strengths & Weaknesses

Table 172. Dikma Technologies Basic Information, Manufacturing Base and Competitors

Table 173. Dikma Technologies Major Business

Table 174. Dikma Technologies Capillary Chromatography Column Product and Services

Table 175. Dikma Technologies Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 176. Dikma Technologies Recent Developments/Updates

Table 177. Dikma Technologies Competitive Strengths & Weaknesses

Table 178. GS-Tek Basic Information, Manufacturing Base and Competitors

Table 179. GS-Tek Major Business

Table 180. GS-Tek Capillary Chromatography Column Product and Services

Table 181. GS-Tek Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 182. GS-Tek Recent Developments/Updates

Table 183. GS-Tek Competitive Strengths & Weaknesses

Table 184. J&K Scientific Basic Information, Manufacturing Base and Competitors

Table 185. J&K Scientific Major Business

Table 186. J&K Scientific Capillary Chromatography Column Product and Services

Table 187. J&K Scientific Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 188. J&K Scientific Recent Developments/Updates

Table 189. J&K Scientific Competitive Strengths & Weaknesses

Table 190. Abel Industries Basic Information, Manufacturing Base and Competitors

Table 191. Abel Industries Major Business

Table 192. Abel Industries Capillary Chromatography Column Product and Services

Table 193. Abel Industries Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 194. Abel Industries Recent Developments/Updates

Table 195. Abel Industries Competitive Strengths & Weaknesses

Table 196. Caplugs Evergreen Basic Information, Manufacturing Base and Competitors

Table 197. Caplugs Evergreen Major Business

Table 198. Caplugs Evergreen Capillary Chromatography Column Product and Services

Table 199. Caplugs Evergreen Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 200. Caplugs Evergreen Recent Developments/Updates

Table 201. Caplugs Evergreen Competitive Strengths & Weaknesses

Table 202. MilliporeSigma Basic Information, Manufacturing Base and Competitors

Table 203. MilliporeSigma Major Business

Table 204. MilliporeSigma Capillary Chromatography Column Product and Services

Table 205. MilliporeSigma Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 206. MilliporeSigma Recent Developments/Updates

Table 207. MilliporeSigma Competitive Strengths & Weaknesses

Table 208. Nacalai Tesque Basic Information, Manufacturing Base and Competitors

Table 209. Nacalai Tesque Major Business

Table 210. Nacalai Tesque Capillary Chromatography Column Product and Services

Table 211. Nacalai Tesque Capillary Chromatography Column Production (Units), Price

(US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 212. Nacalai Tesque Recent Developments/Updates

Table 213. Nacalai Tesque Competitive Strengths & Weaknesses

Table 214. Osaka Soda (Shodex) Basic Information, Manufacturing Base and Competitors

Table 215. Osaka Soda (Shodex) Major Business

Table 216. Osaka Soda (Shodex) Capillary Chromatography Column Product and Services

Table 217. Osaka Soda (Shodex) Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 218. Osaka Soda (Shodex) Recent Developments/Updates

Table 219. Osaka Soda (Shodex) Competitive Strengths & Weaknesses

Table 220. Senshu Scientific Basic Information, Manufacturing Base and Competitors

Table 221. Senshu Scientific Major Business

Table 222. Senshu Scientific Capillary Chromatography Column Product and Services

Table 223. Senshu Scientific Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 224. Senshu Scientific Recent Developments/Updates

Table 225. Senshu Scientific Competitive Strengths & Weaknesses

Table 226. Interchim S.A. Basic Information, Manufacturing Base and Competitors

Table 227. Interchim S.A. Major Business

Table 228. Interchim S.A. Capillary Chromatography Column Product and Services

Table 229. Interchim S.A. Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 230. Interchim S.A. Recent Developments/Updates

Table 231. Interchim S.A. Competitive Strengths & Weaknesses

Table 232. Macherey?Nagel Basic Information, Manufacturing Base and Competitors

Table 233. Macherey?Nagel Major Business

Table 234. Macherey?Nagel Capillary Chromatography Column Product and Services

Table 235. Macherey?Nagel Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 236. Macherey?Nagel Recent Developments/Updates

Table 237. Macherey?Nagel Competitive Strengths & Weaknesses

Table 238. Frontier Laboratories Basic Information, Manufacturing Base and

## Competitors

Table 239. Frontier Laboratories Major Business

Table 240. Frontier Laboratories Capillary Chromatography Column Product and Services

Table 241. Frontier Laboratories Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 242. Frontier Laboratories Recent Developments/Updates

Table 243. Frontier Laboratories Competitive Strengths & Weaknesses

Table 244. SRI Instruments Basic Information, Manufacturing Base and Competitors

Table 245. SRI Instruments Major Business

Table 246. SRI Instruments Capillary Chromatography Column Product and Services

Table 247. SRI Instruments Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 248. SRI Instruments Recent Developments/Updates

Table 249. SRI Instruments Competitive Strengths & Weaknesses

Table 250. Chromatotec Basic Information, Manufacturing Base and Competitors

Table 251. Chromatotec Major Business

Table 252. Chromatotec Capillary Chromatography Column Product and Services

Table 253. Chromatotec Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 254. Chromatotec Recent Developments/Updates

Table 255. Chromatotec Competitive Strengths & Weaknesses

Table 256. Scion Instruments Basic Information, Manufacturing Base and Competitors

Table 257. Scion Instruments Major Business

Table 258. Scion Instruments Capillary Chromatography Column Product and Services

Table 259. Scion Instruments Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 260. Scion Instruments Recent Developments/Updates

Table 261. Scion Instruments Competitive Strengths & Weaknesses

Table 262. Dani Instruments Basic Information, Manufacturing Base and Competitors

Table 263. Dani Instruments Major Business

Table 264. Dani Instruments Capillary Chromatography Column Product and Services

Table 265. Dani Instruments Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

- Table 266. Dani Instruments Recent Developments/Updates
- Table 267. Dani Instruments Competitive Strengths & Weaknesses
- Table 268. Falcon Analytical Basic Information, Manufacturing Base and Competitors
- Table 269. Falcon Analytical Major Business
- Table 270. Falcon Analytical Capillary Chromatography Column Product and Services
- Table 271. Falcon Analytical Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 272. Falcon Analytical Recent Developments/Updates
- Table 273. Falcon Analytical Competitive Strengths & Weaknesses
- Table 274. Sepax Technologies Basic Information, Manufacturing Base and Competitors
- Table 275. Sepax Technologies Major Business
- Table 276. Sepax Technologies Capillary Chromatography Column Product and Services
- Table 277. Sepax Technologies Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 278. Sepax Technologies Recent Developments/Updates
- Table 279. Sepax Technologies Competitive Strengths & Weaknesses
- Table 280. Welch Materials Basic Information, Manufacturing Base and Competitors
- Table 281. Welch Materials Major Business
- Table 282. Welch Materials Capillary Chromatography Column Product and Services
- Table 283. Welch Materials Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 284. Welch Materials Recent Developments/Updates
- Table 285. Welch Materials Competitive Strengths & Weaknesses
- Table 286. Dikma (China) Basic Information, Manufacturing Base and Competitors
- Table 287. Dikma (China) Major Business
- Table 288. Dikma (China) Capillary Chromatography Column Product and Services
- Table 289. Dikma (China) Capillary Chromatography Column Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 290. Dikma (China) Recent Developments/Updates
- Table 291. Dikma (China) Competitive Strengths & Weaknesses
- Table 292. Global Key Players of Capillary Chromatography Column Upstream (Raw Materials)
- Table 293. Global Capillary Chromatography Column Typical Customers

Table 294. Capillary Chromatography Column Typical Distributors

## List Of Figures

### LIST OF FIGURES

Figure 1. Capillary Chromatography Column Picture

Figure 2. World Capillary Chromatography Column Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Capillary Chromatography Column Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Capillary Chromatography Column Production (2021-2032) & (Units)

Figure 5. World Capillary Chromatography Column Average Price (2021-2032) & (US\$/Unit)

Figure 6. World Capillary Chromatography Column Production Value Market Share by Region (2021-2032)

Figure 7. World Capillary Chromatography Column Production Market Share by Region (2021-2032)

Figure 8. North America Capillary Chromatography Column Production (2021-2032) & (Units)

Figure 9. Europe Capillary Chromatography Column Production (2021-2032) & (Units)

Figure 10. China Capillary Chromatography Column Production (2021-2032) & (Units)

Figure 11. Japan Capillary Chromatography Column Production (2021-2032) & (Units)

Figure 12. Latin America Capillary Chromatography Column Production (2021-2032) & (Units)

Figure 13. Middle East & Africa Capillary Chromatography Column Production (2021-2032) & (Units)

Figure 14. Capillary Chromatography Column Market Drivers

Figure 15. Factors Affecting Demand

Figure 16. World Capillary Chromatography Column Consumption (2021-2032) & (Units)

Figure 17. World Capillary Chromatography Column Consumption Market Share by Region (2021-2032)

Figure 18. United States Capillary Chromatography Column Consumption (2021-2032) & (Units)

Figure 19. China Capillary Chromatography Column Consumption (2021-2032) & (Units)

Figure 20. Europe Capillary Chromatography Column Consumption (2021-2032) & (Units)

Figure 21. Japan Capillary Chromatography Column Consumption (2021-2032) & (Units)

Figure 22. South Korea Capillary Chromatography Column Consumption (2021-2032) & (Units)

Figure 23. ASEAN Capillary Chromatography Column Consumption (2021-2032) & (Units)

Figure 24. India Capillary Chromatography Column Consumption (2021-2032) & (Units)

Figure 25. Producer Shipments of Capillary Chromatography Column by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 26. Global Four-firm Concentration Ratios (CR4) for Capillary Chromatography Column Markets in 2025

Figure 27. Global Four-firm Concentration Ratios (CR8) for Capillary Chromatography Column Markets in 2025

Figure 28. United States VS China: Capillary Chromatography Column Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: Capillary Chromatography Column Production Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States VS China: Capillary Chromatography Column Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 31. United States Based Manufacturers Capillary Chromatography Column Production Market Share 2025

Figure 32. China Based Manufacturers Capillary Chromatography Column Production Market Share 2025

Figure 33. Rest of World Based Manufacturers Capillary Chromatography Column Production Market Share 2025

Figure 34. World Capillary Chromatography Column Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 35. World Capillary Chromatography Column Production Value Market Share by Type in 2025

Figure 36. Hollow Column

Figure 37. Packed Capillary Column

Figure 38. Micropacked Column

Figure 39. Others

Figure 40. World Capillary Chromatography Column Production Market Share by Type (2021-2032)

Figure 41. World Capillary Chromatography Column Production Value Market Share by Type (2021-2032)

Figure 42. World Capillary Chromatography Column Average Price by Type (2021-2032) & (US\$/Unit)

Figure 43. World Capillary Chromatography Column Production Value by Column Material, (USD Million), 2021 & 2025 & 2032

Figure 44. World Capillary Chromatography Column Production Value Market Share by Column Material in 2025

Figure 45. Fused Silica Capillary Column

Figure 46. Metal Capillary Column

Figure 47. Glass Capillary Column

Figure 48. World Capillary Chromatography Column Production Market Share by Column Material (2021-2032)

Figure 49. World Capillary Chromatography Column Production Value Market Share by Column Material (2021-2032)

Figure 50. World Capillary Chromatography Column Average Price by Column Material (2021-2032) & (US\$/Unit)

Figure 51. World Capillary Chromatography Column Production Value by Column Structure, (USD Million), 2021 & 2025 & 2032

Figure 52. World Capillary Chromatography Column Production Value Market Share by Column Structure in 2025

Figure 53. Wall-Coated Open Tubular Column

Figure 54. Porous Layer Open Tubular Column

Figure 55. Support-Coated Open Tubular Column

Figure 56. World Capillary Chromatography Column Production Market Share by Column Structure (2021-2032)

Figure 57. World Capillary Chromatography Column Production Value Market Share by Column Structure (2021-2032)

Figure 58. World Capillary Chromatography Column Average Price by Column Structure (2021-2032) & (US\$/Unit)

Figure 59. World Capillary Chromatography Column Production Value by Column Length, (USD Million), 2021 & 2025 & 2032

Figure 60. World Capillary Chromatography Column Production Value Market Share by Column Length in 2025

Figure 61. Short Capillary Column

Figure 62. Medium-length Capillary Column

Figure 63. Long Capillary Column

Figure 64. World Capillary Chromatography Column Production Market Share by Column Length (2021-2032)

Figure 65. World Capillary Chromatography Column Production Value Market Share by Column Length (2021-2032)

Figure 66. World Capillary Chromatography Column Average Price by Column Length (2021-2032) & (US\$/Unit)

Figure 67. World Capillary Chromatography Column Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 68. World Capillary Chromatography Column Production Value Market Share by Application in 2025

Figure 69. Environmental Monitoring

Figure 70. Pharmacy

Figure 71. Petrochemical Industry

Figure 72. Others

Figure 73. World Capillary Chromatography Column Production Market Share by Application (2021-2032)

Figure 74. World Capillary Chromatography Column Production Value Market Share by Application (2021-2032)

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