

Global Chiral Stationary Phase?CSP? Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Chiral Stationary Phase?CSP? market size is expected to reach \$ 2132 million by 2032, rising at a market growth of 7.0% CAGR during the forecast period (2026-2032).

Chiral stationary phases (CSPs) are functional materials used in liquid chromatography systems (including HPLC and UHPLC) and supercritical fluid chromatography (SFC) for enantioselective separation of chiral compounds. They incorporate chiral recognition elements (e.g., polysaccharide derivatives, proteins, cyclodextrins, macrocyclic antibiotics, and chiral ligands) onto or within various supports (silica-based, polymer-based, or hybrid materials). Through non-covalent interactions such as hydrogen bonding, π - π interactions, steric matching, and hydrophobic effects, CSPs enable molecular-level discrimination and differential retention of enantiomers. They serve both analytical-scale method development and preparative-scale purification, with applications spanning pharmaceuticals, agrochemicals, food, and fine chemicals. Their value is driven by enantioselectivity, method transferability, and scalability robustness.

Capacity is highly concentrated in Japan, Europe, and the United States, with polysaccharide-based CSPs accounting for about 75% of total usage and immobilized products exceeding 60% share, corresponding to an annual consumption of about 16,000 liters of packed media (analytical and preparative combined) and a nominal capacity of roughly 22,000 liters. Pricing is strongly tiered, with analytical-grade CSPs averaging USD 80,000–120,000 per liter, preparative-grade at USD 25,000–40,000 per liter, and SMB-equivalent industrial usage at USD 12,000–18,000 per liter, resulting in an overall blended gross margin of approximately 65%. Pharmaceuticals dominate downstream demand at about 68%, followed by agrochemicals at 20% and food/fine chemicals at 12%. The value chain consists of upstream silica/polymer supports and

chiral selectors (primarily polysaccharide derivatives), midstream stationary phase manufacturing, and downstream process integration from analytical method development to preparative and continuous separation (SMB). The global industry exhibits a highly concentrated origin of chiral recognition technologies combined with relatively fragmented application deployment, with Japanese players (led by Daicel) controlling core selector technologies, Western companies maintaining high-end market positions, and Chinese players (e.g., NanoMicro and Sepax) transitioning from base materials toward chiral functionality but still lacking fundamental selector innovation. Overall, the industry is in a technology-driven steady growth phase, with key drivers being the increasing proportion of single-enantiomer drugs and rising purification complexity in advanced therapeutics, while the main uncertainty lies in partial substitution by asymmetric synthesis routes.

This report studies the global Chiral Stationary Phase?CSP? production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Chiral Stationary Phase?CSP? 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 Chiral Stationary Phase?CSP? that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Chiral Stationary Phase?CSP? total production and demand, 2021-2032, (L)

Global Chiral Stationary Phase?CSP? total production value, 2021-2032, (USD Million)

Global Chiral Stationary Phase?CSP? production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (L), (based on production site)

Global Chiral Stationary Phase?CSP? consumption by region & country, CAGR, 2021-2032 & (L)

U.S. VS China: Chiral Stationary Phase?CSP? domestic production, consumption, key domestic manufacturers and share

Global Chiral Stationary Phase?CSP? production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (L)

Global Chiral Stationary Phase?CSP? production by Type, production, value, CAGR, 2021-2032, (USD Million) & (L)

Global Chiral Stationary Phase?CSP? production by Application, production, value, CAGR, 2021-2032, (USD Million) & (L)

This report profiles key players in the global Chiral Stationary Phase?CSP? 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 Daicel Corporation, Regis Technologies, Phenomenex, YMC Co., Ltd., Nacalai Tesque, Merck KGaA, ES Industries, Shinwa Chemical Industries, GL Sciences, Kromasil, 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 Chiral Stationary Phase?CSP? market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (L) and average price (US\$/L) 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 Chiral Stationary Phase?CSP? Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Chiral Stationary Phase?CSP? Market, Segmentation by Type:

Polysaccharide-based CSP

Cyclodextrin-based CSP

Protein-based CSP

Macrocyclic Antibiotic CSP

Pirkle-type CSP

Ligand-exchange CSP

Global Chiral Stationary Phase?CSP? Market, Segmentation by Form:

Coated CSP

Immobilized CSP

Global Chiral Stationary Phase?CSP? Market, Segmentation by Application:

Pharmaceuticals

Agrochemicals

Food & Flavors

Fine Chemicals

Environmental & Forensic

Others

Companies Profiled:

Daicel Corporation

Regis Technologies

Phenomenex

YMC Co., Ltd.

Nacalai Tesque

Merck KGaA

ES Industries

Shinwa Chemical Industries

GL Sciences

Kromasil

Suzhou NanoMicro Technology

YMC Shanghai

Welch Materials

Dalian Elite Analytical Instruments

Sepax Technologies

Hanbon Science & Technology

SinoChrom OSD

Jiangxi Aiyi High Tech

Key Questions Answered:

1. How big is the global Chiral Stationary Phase?CSP? market?

2. What is the demand of the global Chiral Stationary Phase?CSP? market?
3. What is the year over year growth of the global Chiral Stationary Phase?CSP? market?
4. What is the production and production value of the global Chiral Stationary Phase?CSP? market?
5. Who are the key producers in the global Chiral Stationary Phase?CSP? market?
6. What are the growth factors driving the market demand?

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