

Global Chiral Stationary Phase?CSP? Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Chiral Stationary Phase?CSP? market size was valued at US\$ 1321 million in 2025 and is forecast to a readjusted size of US\$ 2132 million by 2032 with a CAGR of 7.0% during review period.

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 is a detailed and comprehensive analysis for global Chiral Stationary Phase?CSP? market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Chiral Stationary Phase?CSP? market size and forecasts, in consumption value (\$ Million), sales quantity (L), and average selling prices (US\$/L), 2021-2032

Global Chiral Stationary Phase?CSP? market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (L), and average selling prices (US\$/L), 2021-2032

Global Chiral Stationary Phase?CSP? market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (L), and average selling prices (US\$/L), 2021-2032

Global Chiral Stationary Phase?CSP? market shares of main players, shipments in revenue (\$ Million), sales quantity (L), and ASP (US\$/L), 2021-2026

The Primary Objectives in This Report Are:

Global Chiral Stationary Phase?CSP? Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2...

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Chiral Stationary Phase?CSP?

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Chiral Stationary Phase?CSP? market based on the following parameters - company overview, sales quantity, revenue, 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.

Market Segmentation

Chiral Stationary Phase?CSP? market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Polysaccharide-based CSP

Cyclodextrin-based CSP

Protein-based CSP

Macrocyclic Antibiotic CSP

Pirkle-type CSP

Ligand-exchange CSP

Market segment by Form

Coated CSP

Immobilized CSP

Market segment by Application

Pharmaceuticals

Agrochemicals

Food & Flavors

Fine Chemicals

Environmental & Forensic

Others

Major players covered

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

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Chiral Stationary Phase?CSP? product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Chiral Stationary Phase?CSP?, with price, sales quantity, revenue, and global market share of Chiral Stationary Phase?CSP? from 2021 to 2026.

Chapter 3, the Chiral Stationary Phase?CSP? competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Chiral Stationary Phase?CSP? breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026.and Chiral Stationary Phase?CSP? market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Chiral Stationary Phase?CSP?.

Chapter 14 and 15, to describe Chiral Stationary Phase?CSP? sales channel, distributors, customers, research findings and conclusion.

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