

Global Chromatography in Cannabis Testing Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Chromatography in Cannabis Testing market size is expected to reach \$ 6951 million by 2032, rising at a market growth of 15.7% CAGR during the forecast period (2026-2032).

Chromatography in cannabis testing uses liquid chromatography and gas chromatography as the analytical core. After sample preparation extracts and cleans up target analytes from complex matrices, the method separates and quantifies them to demonstrate accurate potency and meet safety and compliance requirements. In common practice, liquid chromatography is used to quantify major and minor cannabinoids and their acidic forms, avoiding heat driven decarboxylation and degradation so it can support label claim verification and formulation consistency control. Gas chromatography and headspace injection are often used for terpene profiling and residual solvents and other volatile compounds, fitting high volatility risk matrices such as concentrates and vape liquids. For trace contaminants such as pesticide residues and mycotoxins, laboratories more often use LC MS MS (liquid chromatography tandem mass spectrometry) to achieve higher selectivity and lower detection limits, while isotope labeled internal standards are applied to correct matrix effects. Method reliability depends on traceable calibration using reference standards and certified reference materials and on validation workflows in which spiked recoveries and quality control samples are embedded end to end. To improve throughput and consistency, vendors provide integrated solutions ranging from fast sample preparation such as QuEChERS to chromatography and mass spectrometry platforms, as well as method packages and report templates, enabling third party labs and in house QC teams to generate stable COAs (Certificates of Analysis) across multiple matrices and support regulatory audits and process optimization. Delivery formats include standardized workflows for routine potency testing using HPLC or UHPLC with UV

detection and full menu compliance built on combined LC MS MS and GC MS platforms, complemented by columns and method kits to improve method transferability and throughput. Some solutions are moving toward field deployment and lower skill operation, for example portable HPLC systems that standardize sample preparation and analysis steps in software to shorten the time from sampling to results. Because regulatory analyte lists and limits vary by jurisdiction, testing menus typically expand in modules including potency, terpenes, residual solvents, pesticides, and toxins, with traceable calibration and data integrity ultimately supporting COAs and audits.

The technical workflow for chromatography-based cannabis testing is converging on a clear division of labor and a modular 'menu' structure. Potency and cannabinoid profiling are typically built on HPLC or UHPLC, using UV or diode-array detection to deliver stable quantitation of major cannabinoids and their acidic forms, while avoiding heat-driven decarboxylation bias. Volatile analytes are more often handled on GC platforms: terpene profiling supports flavor and formulation differentiation, and headspace GC-MS is commonly used for residual solvents to reduce false positives and to fit high-risk matrices such as concentrates and vape liquids. Trace contaminants such as pesticides and mycotoxins increasingly rely on LC-MS/MS for lower detection limits and higher selectivity, with isotope-labeled internal standards applied to mitigate matrix effects. Because regulatory analyte lists and limits vary by jurisdiction, laboratories generally stack modules—potency, terpenes, residual solvents, pesticides, and toxins—into compliance packages, making method selection and instrument configuration more predictable.

On the supply side, capability is shifting from standalone instruments to end-to-end standardized delivery, aimed at higher throughput and audit-ready operation. Vendors bundle sample preparation, columns and method kits, instrument configurations, and software workflows to emphasize faster method transfer, fewer manual steps, and more consistent results, thereby reducing training burden and rework for third-party laboratories and in-house QC teams. Sample preparation is repeatedly positioned as the key determinant of accurate quantitation: repeatable procedures are built around homogenization, extraction, cleanup, and spiked recoveries, paired with traceable standards and certified reference materials for calibration, and reinforced by QC samples embedded across the entire workflow to satisfy audits. For high-frequency routine programs, the market is moving toward 'fixed menu' solutions that lock down method parameters, reporting templates, and system compatibility, shortening turnaround from sample receipt to COA issuance. Some products are further trending toward portability and workflow lock-in, using guided software steps to reduce operator variability and to deliver faster cycle times for on-site production support and rapid

release.

Manufacturing and go-to-market models are increasingly defined by regionalization alongside globalization, which directly influences delivery stability and localized compliance support. Leading vendors generally adopt multi-country manufacturing and multi-regional supply chains, placing key production nodes across North America, Europe, and Asia to reduce logistics and tariff shocks while strengthening delivery resilience. In parallel, sales and service organizations are commonly structured by region and built on a two-tier model?direct operations in selected countries plus global distribution?so the same chromatography and mass spectrometry platforms can reach more geographies, supported by local teams that align with differing regulatory menus and methodological conventions. In cannabis testing, demand is highly concentrated in jurisdictions with mature regulation and mandatory testing, yet cross-border flows of raw materials and finished products are also pushing quality systems toward global consistency. Competitive advantage is therefore shifting from single-point performance to regional fulfillment, application support, method-kit updates, and data integrity; the vendors that can translate regulatory changes into deployable standard workflows the fastest are more likely to achieve durable stickiness with laboratories and brand owners.

This report studies the global Chromatography in Cannabis Testing demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Chromatography in Cannabis Testing, 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 Chromatography in Cannabis Testing that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Chromatography in Cannabis Testing total market, 2021-2032, (USD Million)

Global Chromatography in Cannabis Testing total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Chromatography in Cannabis Testing total market, key domestic companies, and share, (USD Million)

Global Chromatography in Cannabis Testing revenue by player, revenue and market share 2021-2026, (USD Million)

Global Chromatography in Cannabis Testing total market by Type, CAGR, 2021-2032, (USD Million)

Global Chromatography in Cannabis Testing total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Chromatography in Cannabis Testing market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Medicinal Genomics, Hamilton, PerkinElmer, Todaro Robotics, Shimadzu Scientific Instruments, Agilent Technologies, Restek, Agilent Technologies, Waters Corporation, Shimadzu Corporation, 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 Chromatography in Cannabis Testing market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, 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 Chromatography in Cannabis Testing Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Chromatography in Cannabis Testing Market, Segmentation by Type:

Liquid Chromatography

Gas Chromatography

Others

Global Chromatography in Cannabis Testing Market, Segmentation by Deployment Method:

Central Lab Deployment

Portable Deployment

Global Chromatography in Cannabis Testing Market, Segmentation by Level of Automation:

Manual-dominant

Semi-automated

End-to-end Automation

Global Chromatography in Cannabis Testing Market, Segmentation by Application:

Pain Management

Seizures

Sclerosis

Others

Companies Profiled:

Medicinal Genomics

Hamilton

PerkinElmer

Todaro Robotics

Shimadzu Scientific Instruments

Agilent Technologies

Restek

Agilent Technologies

Waters Corporation

Shimadzu Corporation

SCIEX

Thermo Fisher Scientific

PerkinElmer

Phenomenex

Restek

Merck (Sigma-Aldrich)

Sartorius

EST Analytical

SCION Instruments

analyticon instruments gmbh

Cayman Chemical

Key Questions Answered

1. How big is the global Chromatography in Cannabis Testing market?
2. What is the demand of the global Chromatography in Cannabis Testing market?
3. What is the year over year growth of the global Chromatography in Cannabis Testing market?
4. What is the total value of the global Chromatography in Cannabis Testing market?
5. Who are the Major Players in the global Chromatography in Cannabis Testing market?
6. What are the growth factors driving the market demand?

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