

Global Cyano Chromatography Packing Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Cyano Chromatography Packing market size is expected to reach \$ 128 million by 2032, rising at a market growth of 5.4% CAGR during the forecast period (2026-2032).

Cyano (CN) chromatography media are liquid chromatography stationary phases based on spherical silica, hybrid silica, core-shell silica, or polymer microspheres, functionalized with cyanopropyl or related cyano ligands. These materials can operate under normal-phase, reversed-phase, and hydrophilic interaction-related separation modes. They are used for the analysis and preparative purification of moderately polar compounds, highly hydrophobic compounds, pharmaceutical impurities, natural products, and structurally similar small molecules. The estimated gross margin is approximately 55%.

Cyano stationary phases are a specialized class of polar bonded phases in HPLC. Their market size is significantly smaller than mainstream reversed-phase media such as C18 and C8, but they typically exhibit higher unit value, higher method validation cost, and stronger customer stickiness. Demand is mainly driven by pharmaceutical quality research, impurity profiling, food and environmental testing, natural product separation, and small-scale preparative purification. Customers generally purchase based on established analytical methods, pharmacopeia compliance, and chromatographic performance (especially peak shape and selectivity), rather than on price alone.

The key value of cyano phases lies in providing orthogonal selectivity relative to conventional reversed-phase columns. The cyano ligand enables dipole interactions, weak hydrophobic interactions, and partial π interactions, making it suitable for compounds that are poorly retained or excessively retained on C18 columns, or that

show poor equilibration or inconsistent surface interactions on bare silica phases. Purchasing decisions are therefore heavily driven by batch-to-batch consistency, low metal content, minimal tailing, stable efficiency, and reliable method transfer.

Future growth is expected to come more from method upgrades, expansion of UHPLC applications, and high-end domestic substitution rather than replacement of mainstream reversed-phase materials. Opportunities exist in sub-2 μ m particles, core-shell architectures, preparative wide-pore materials, and cyano-based mixed-mode stationary phases. However, market penetration depends on pharmacopeia coverage, long-term stability datasets, and scalable production capability for consistent batch supply.

This report studies the global Cyano Chromatography Packing production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Cyano Chromatography Packing total production and demand, 2021-2032, (kg)

Global Cyano Chromatography Packing total production value, 2021-2032, (USD Million)

Global Cyano Chromatography Packing production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (kg), (based on production site)

Global Cyano Chromatography Packing consumption by region & country, CAGR, 2021-2032 & (kg)

U.S. VS China: Cyano Chromatography Packing domestic production, consumption, key domestic manufacturers and share

Global Cyano Chromatography Packing production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (kg)

Global Cyano Chromatography Packing production by Type, production, value, CAGR, 2021-2032, (USD Million) & (kg)

Global Cyano Chromatography Packing production by Application, production, value, CAGR, 2021-2032, (USD Million) & (kg)

This report profiles key players in the global Cyano Chromatography Packing 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 Merck, Agilent, Waters, Thermo Fisher Scientific, Phenomenex, YMC, GL Sciences, Nouryon, SiliCycle, Sepax Technologies, 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 Cyano Chromatography Packing market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (kg) and average price (US\$/kg) 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 Cyano Chromatography Packing Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Cyano Chromatography Packing Market, Segmentation by Type:

Spherical Silica Cyano Packing

Hybrid Silica Cyano Packing

Core-Shell Cyano Packing

Polymer-Based Cyano Packing

Mixed-Mode Cyano Packing

Global Cyano Chromatography Packing Market, Segmentation by Particle Size:

Sub-2 μ m

2-3 μ m

3-5 μ m

5-10 μ m

Above 10 μ m

Global Cyano Chromatography Packing Market, Segmentation by Pore Size:

60-90 $\text{\AA}$

100-150 $\text{\AA}$

200-300 $\text{\AA}$

Above 300 $\text{\AA}$

Other Pore Sizes

Global Cyano Chromatography Packing Market, Segmentation by Surface Treatment:

Endcapped Cyano

Non-Endcapped Cyano

High-Coverage Cyano

Low-Carbon Load Cyano

Mixed-Ligand Cyano

Global Cyano Chromatography Packing Market, Segmentation by Application:

Normal-Phase Separation

Reversed-Phase Separation

Polar Compound Analysis

Preparative Purification

Quality Control and Method Development

Other Applications

Companies Profiled:

Merck

Agilent

Waters

Thermo Fisher Scientific

Phenomenex

YMC

GL Sciences

Nouryon

SiliCycle

Sepax Technologies

Restek

KNAUER

Macherey-Nagel

Nacalai Tesque

Welch Materials

Dr. Maisch

Key Questions Answered:

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

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