

Global HILIC Chromatography Media 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 HILIC Chromatography Media market size was valued at US\$ 85.40 million in 2025 and is forecast to a readjusted size of US\$ 118 million by 2032 with a CAGR of 4.7% during review period.

HILIC (Hydrophilic Interaction Liquid Chromatography) stationary phases are chromatographic media designed for hydrophilic interaction liquid chromatography. They are typically based on high-purity silica, core-shell silica, hybrid organic-inorganic particles, or polymer microspheres, and are functionalized with bare silanol, diol, amide, amino, zwitterionic, or mixed-mode groups to enable retention and separation of highly polar, hydrophilic, and ionic compounds. Applications include pharmaceutical impurities, metabolites, sugars, glycoforms, nucleotides, and polar small-molecule analysis. The estimated gross margin is approximately 55%.

Demand for HILIC media is primarily driven by analytical challenges where reversed-phase chromatography fails to retain highly polar analytes, particularly in drug impurities, metabolites, carbohydrates, nucleotides, and charged small molecules. With the widespread adoption of LC-MS systems, the high organic mobile phase conditions used in HILIC improve ionization efficiency and sensitivity, making it increasingly a routine tool in pharmaceutical R&D, clinical mass spectrometry, and omics-based analysis rather than a niche complementary method.

Competitive differentiation is no longer limited to basic HILIC retention capability, but increasingly depends on batch reproducibility, low metal content, minimal nonspecific adsorption, pH stability, and LC-MS compatibility. Leading suppliers are advancing through hybrid particles, core-shell technologies, zwitterionic phases, and specialized

glycan analysis columns to improve method robustness. Smaller manufacturers tend to compete in bulk media supply, custom particle sizing, and cost-driven segments.

Although the overall market size is smaller than mainstream reversed-phase media such as C18, HILIC materials typically command higher technical barriers and pricing. Future growth is expected from biopharmaceutical glycan profiling, metabolomics, food safety testing, and clinical diagnostics. The market is unlikely to commoditize quickly and will likely remain a high-margin, application-diverse, and validation-driven specialty segment.

This report is a detailed and comprehensive analysis for global HILIC Chromatography Media 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 HILIC Chromatography Media market size and forecasts, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global HILIC Chromatography Media market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global HILIC Chromatography Media market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global HILIC Chromatography Media market shares of main players, shipments in revenue (\$ Million), sales quantity (kg), and ASP (US\$/kg), 2021-2026

The Primary Objectives in This Report Are:

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

To assess the growth potential for HILIC Chromatography Media

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 HILIC Chromatography Media 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 Merck, Waters, Agilent Technologies, Thermo Fisher Scientific, Phenomenex, Tosoh Bioscience, YMC, GL Sciences, HILICON, Sepax Technologies, etc.

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

Market Segmentation

HILIC Chromatography Media 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

Bare Silica HILIC

Diol HILIC

Amide HILIC

Amino HILIC

Zwitterionic HILIC

Mixed-Mode HILIC

Polymer-Based HILIC

Market segment by Matrix and Particle Structure

Fully Porous Silica

Core-Shell Silica

Hybrid Organic-Inorganic Particles

Polymer Particles

Monodisperse Silica

Monolithic Media

Market segment by Particle Size Grade

Sub-2 μ m UHPLC Grade

2-3 μ m High-Efficiency Grade

3-5 μ m Analytical HPLC Grade

5-10 μ m Semi-Preparative Grade

>10 μ m Preparative and Bulk Grade

Market segment by Pore Size Grade

60-80 $\text{\AA}$ Small-Pore Grade

90-120 $\text{\AA}$ Standard-Pore Grade

150-200 $\text{\AA}$ Medium-Pore Grade

300 $\text{\AA}$ Wide-Pore Grade

Non-Porous and Proprietary Grade

Market segment by Application

Pharmaceutical Quality Control

Biopharmaceutical Glycan Analysis

Metabolomics and Lipidomics

Clinical Bioanalysis

Food and Environmental Testing

Preparative Purification and Other

Major players covered

Merck

Waters

Agilent Technologies

Thermo Fisher Scientific

Phenomenex

Tosoh Bioscience

YMC

GL Sciences

HILICON

Sepax Technologies

SIELC Technologies

Macherey-Nagel

Restek

Avantor ACE

Osaka Soda

NanoMicro Technology

Nouryon

Welch Materials

Dikma Technologies

SiliCycle

Dr. Maisch

Nacalai Tesque

Advanced Materials Technology

Fortis Technologies

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 HILIC Chromatography Media product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of HILIC Chromatography Media, with price, sales quantity, revenue, and global market share of HILIC Chromatography Media from 2021 to 2026.

Chapter 3, the HILIC Chromatography Media competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the HILIC Chromatography Media 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 HILIC Chromatography Media 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 HILIC Chromatography Media.

Chapter 14 and 15, to describe HILIC Chromatography Media sales channel, distributors, customers, research findings and conclusion.

Contents

1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Market Analysis by Type

1.3.1 Overview: Global HILIC Chromatography Media Consumption Value by Type: 2021 Versus 2025 Versus 2032

1.3.2 Bare Silica HILIC

1.3.3 Diol HILIC

1.3.4 Amide HILIC

1.3.5 Amino HILIC

1.3.6 Zwitterionic HILIC

1.3.7 Mixed-Mode HILIC

1.3.8 Polymer-Based HILIC

1.4 Market Analysis by Matrix and Particle Structure

1.4.1 Overview: Global HILIC Chromatography Media Consumption Value by Matrix and Particle Structure: 2021 Versus 2025 Versus 2032

1.4.2 Fully Porous Silica

1.4.3 Core-Shell Silica

1.4.4 Hybrid Organic-Inorganic Particles

1.4.5 Polymer Particles

1.4.6 Monodisperse Silica

1.4.7 Monolithic Media

1.5 Market Analysis by Particle Size Grade

1.5.1 Overview: Global HILIC Chromatography Media Consumption Value by Particle Size Grade: 2021 Versus 2025 Versus 2032

1.5.2 Sub-2 µm UHPLC Grade

1.5.3 2-3 µm High-Efficiency Grade

1.5.4 3-5 µm Analytical HPLC Grade

1.5.5 5-10 µm Semi-Preparative Grade

1.5.6 >10 µm Preparative and Bulk Grade

1.6 Market Analysis by Pore Size Grade

1.6.1 Overview: Global HILIC Chromatography Media Consumption Value by Pore Size Grade: 2021 Versus 2025 Versus 2032

1.6.2 60-80 Å Small-Pore Grade

1.6.3 90-120 Å Standard-Pore Grade

1.6.4 150-200 Å Medium-Pore Grade

- 1.6.5 300 ? Wide-Pore Grade
- 1.6.6 Non-Porous and Proprietary Grade
- 1.7 Market Analysis by Application
 - 1.7.1 Overview: Global HILIC Chromatography Media Consumption Value by Application: 2021 Versus 2025 Versus 2032
 - 1.7.2 Pharmaceutical Quality Control
 - 1.7.3 Biopharmaceutical Glycan Analysis
 - 1.7.4 Metabolomics and Lipidomics
 - 1.7.5 Clinical Bioanalysis
 - 1.7.6 Food and Environmental Testing
 - 1.7.7 Preparative Purification and Other
- 1.8 Global HILIC Chromatography Media Market Size & Forecast
 - 1.8.1 Global HILIC Chromatography Media Consumption Value (2021 & 2025 & 2032)
 - 1.8.2 Global HILIC Chromatography Media Sales Quantity (2021-2032)
 - 1.8.3 Global HILIC Chromatography Media Average Price (2021-2032)

2 MANUFACTURERS PROFILES

- 2.1 Merck
 - 2.1.1 Merck Details
 - 2.1.2 Merck Major Business
 - 2.1.3 Merck HILIC Chromatography Media Product and Services
 - 2.1.4 Merck HILIC Chromatography Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.1.5 Merck Recent Developments/Updates
- 2.2 Waters
 - 2.2.1 Waters Details
 - 2.2.2 Waters Major Business
 - 2.2.3 Waters HILIC Chromatography Media Product and Services
 - 2.2.4 Waters HILIC Chromatography Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.2.5 Waters Recent Developments/Updates
- 2.3 Agilent Technologies
 - 2.3.1 Agilent Technologies Details
 - 2.3.2 Agilent Technologies Major Business
 - 2.3.3 Agilent Technologies HILIC Chromatography Media Product and Services
 - 2.3.4 Agilent Technologies HILIC Chromatography Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.3.5 Agilent Technologies Recent Developments/Updates

2.4 Thermo Fisher Scientific

2.4.1 Thermo Fisher Scientific Details

2.4.2 Thermo Fisher Scientific Major Business

2.4.3 Thermo Fisher Scientific HILIC Chromatography Media Product and Services

2.4.4 Thermo Fisher Scientific HILIC Chromatography Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.4.5 Thermo Fisher Scientific Recent Developments/Updates

2.5 Phenomenex

2.5.1 Phenomenex Details

2.5.2 Phenomenex Major Business

2.5.3 Phenomenex HILIC Chromatography Media Product and Services

2.5.4 Phenomenex HILIC Chromatography Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.5.5 Phenomenex Recent Developments/Updates

2.6 Tosoh Bioscience

2.6.1 Tosoh Bioscience Details

2.6.2 Tosoh Bioscience Major Business

2.6.3 Tosoh Bioscience HILIC Chromatography Media Product and Services

2.6.4 Tosoh Bioscience HILIC Chromatography Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.6.5 Tosoh Bioscience Recent Developments/Updates

2.7 YMC

2.7.1 YMC Details

2.7.2 YMC Major Business

2.7.3 YMC HILIC Chromatography Media Product and Services

2.7.4 YMC HILIC Chromatography Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.7.5 YMC Recent Developments/Updates

2.8 GL Sciences

2.8.1 GL Sciences Details

2.8.2 GL Sciences Major Business

2.8.3 GL Sciences HILIC Chromatography Media Product and Services

2.8.4 GL Sciences HILIC Chromatography Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.8.5 GL Sciences Recent Developments/Updates

2.9 HILICON

2.9.1 HILICON Details

2.9.2 HILICON Major Business

2.9.3 HILICON HILIC Chromatography Media Product and Services

2.9.4 HILICON HILIC Chromatography Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.9.5 HILICON Recent Developments/Updates

2.10 Sepax Technologies

2.10.1 Sepax Technologies Details

2.10.2 Sepax Technologies Major Business

2.10.3 Sepax Technologies HILIC Chromatography Media Product and Services

2.10.4 Sepax Technologies HILIC Chromatography Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.10.5 Sepax Technologies Recent Developments/Updates

2.11 SIELC Technologies

2.11.1 SIELC Technologies Details

2.11.2 SIELC Technologies Major Business

2.11.3 SIELC Technologies HILIC Chromatography Media Product and Services

2.11.4 SIELC Technologies HILIC Chromatography Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.11.5 SIELC Technologies Recent Developments/Updates

2.12 Macherey-Nagel

2.12.1 Macherey-Nagel Details

2.12.2 Macherey-Nagel Major Business

2.12.3 Macherey-Nagel HILIC Chromatography Media Product and Services

2.12.4 Macherey-Nagel HILIC Chromatography Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.12.5 Macherey-Nagel Recent Developments/Updates

2.13 Restek

2.13.1 Restek Details

2.13.2 Restek Major Business

2.13.3 Restek HILIC Chromatography Media Product and Services

2.13.4 Restek HILIC Chromatography Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.13.5 Restek Recent Developments/Updates

2.14 Avantor ACE

2.14.1 Avantor ACE Details

2.14.2 Avantor ACE Major Business

2.14.3 Avantor ACE HILIC Chromatography Media Product and Services

2.14.4 Avantor ACE HILIC Chromatography Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.14.5 Avantor ACE Recent Developments/Updates

2.15 Osaka Soda

- 2.15.1 Osaka Soda Details
- 2.15.2 Osaka Soda Major Business
- 2.15.3 Osaka Soda HILIC Chromatography Media Product and Services
- 2.15.4 Osaka Soda HILIC Chromatography Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.15.5 Osaka Soda Recent Developments/Updates
- 2.16 NanoMicro Technology
 - 2.16.1 NanoMicro Technology Details
 - 2.16.2 NanoMicro Technology Major Business
 - 2.16.3 NanoMicro Technology HILIC Chromatography Media Product and Services
 - 2.16.4 NanoMicro Technology HILIC Chromatography Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.16.5 NanoMicro Technology Recent Developments/Updates
- 2.17 Nouryon
 - 2.17.1 Nouryon Details
 - 2.17.2 Nouryon Major Business
 - 2.17.3 Nouryon HILIC Chromatography Media Product and Services
 - 2.17.4 Nouryon HILIC Chromatography Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.17.5 Nouryon Recent Developments/Updates
- 2.18 Welch Materials
 - 2.18.1 Welch Materials Details
 - 2.18.2 Welch Materials Major Business
 - 2.18.3 Welch Materials HILIC Chromatography Media Product and Services
 - 2.18.4 Welch Materials HILIC Chromatography Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.18.5 Welch Materials Recent Developments/Updates
- 2.19 Dikma Technologies
 - 2.19.1 Dikma Technologies Details
 - 2.19.2 Dikma Technologies Major Business
 - 2.19.3 Dikma Technologies HILIC Chromatography Media Product and Services
 - 2.19.4 Dikma Technologies HILIC Chromatography Media Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.19.5 Dikma Technologies Recent Developments/Updates
- 2.20 SiliCycle
 - 2.20.1 SiliCycle Details
 - 2.20.2 SiliCycle Major Business
 - 2.20.3 SiliCycle HILIC Chromatography Media Product and Services
 - 2.20.4 SiliCycle HILIC Chromatography Media Sales Quantity, Average Price,

Revenue, Gross Margin and Market Share (2021-2026)

2.20.5 SiliCycle Recent Developments/Updates

2.21 Dr. Maisch

2.21.1 Dr. Maisch Details

2.21.2 Dr. Maisch Major Business

2.21.3 Dr. Maisch HILIC Chromatography Media Product and Services

2.21.4 Dr. Maisch HILIC Chromatography Media Sales Quantity, Average Price,
Revenue, Gross Margin and Market Share (2021-2026)

2.21.5 Dr. Maisch Recent Developments/Updates

2.22 Nacalai Tesque

2.22.1 Nacalai Tesque Details

2.22.2 Nacalai Tesque Major Business

2.22.3 Nacalai Tesque HILIC Chromatography Media Product and Services

2.22.4 Nacalai Tesque HILIC Chromatography Media Sales Quantity, Average Price,
Revenue, Gross Margin and Market Share (2021-2026)

2.22.5 Nacalai Tesque Recent Developments/Updates

2.23 Advanced Materials Technology

2.23.1 Advanced Materials Technology Details

2.23.2 Advanced Materials Technology Major Business

2.23.3 Advanced Materials Technology HILIC Chromatography Media Product and
Services

2.23.4 Advanced Materials Technology HILIC Chromatography Media Sales Quantity,
Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.23.5 Advanced Materials Technology Recent Developments/Updates

2.24 Fortis Technologies

2.24.1 Fortis Technologies Details

2.24.2 Fortis Technologies Major Business

2.24.3 Fortis Technologies HILIC Chromatography Media Product and Services

2.24.4 Fortis Technologies HILIC Chromatography Media Sales Quantity, Average
Price, Revenue, Gross Margin and Market Share (2021-2026)

2.24.5 Fortis Technologies Recent Developments/Updates

3 COMPETITIVE ENVIRONMENT: HILIC CHROMATOGRAPHY MEDIA BY MANUFACTURER

3.1 Global HILIC Chromatography Media Sales Quantity by Manufacturer (2021-2026)

3.2 Global HILIC Chromatography Media Revenue by Manufacturer (2021-2026)

3.3 Global HILIC Chromatography Media Average Price by Manufacturer (2021-2026)

3.4 Market Share Analysis (2025)

3.4.1 Producer Shipments of HILIC Chromatography Media by Manufacturer Revenue (\$MM) and Market Share (%): 2025

3.4.2 Top 3 HILIC Chromatography Media Manufacturer Market Share in 2025

3.4.3 Top 6 HILIC Chromatography Media Manufacturer Market Share in 2025

3.5 HILIC Chromatography Media Market: Overall Company Footprint Analysis

3.5.1 HILIC Chromatography Media Market: Region Footprint

3.5.2 HILIC Chromatography Media Market: Company Product Type Footprint

3.5.3 HILIC Chromatography Media Market: Company Product Application Footprint

3.6 New Market Entrants and Barriers to Market Entry

3.7 Mergers, Acquisition, Agreements, and Collaborations

4 CONSUMPTION ANALYSIS BY REGION

4.1 Global HILIC Chromatography Media Market Size by Region

4.1.1 Global HILIC Chromatography Media Sales Quantity by Region (2021-2032)

4.1.2 Global HILIC Chromatography Media Consumption Value by Region (2021-2032)

4.1.3 Global HILIC Chromatography Media Average Price by Region (2021-2032)

4.2 North America HILIC Chromatography Media Consumption Value (2021-2032)

4.3 Europe HILIC Chromatography Media Consumption Value (2021-2032)

4.4 Asia-Pacific HILIC Chromatography Media Consumption Value (2021-2032)

4.5 South America HILIC Chromatography Media Consumption Value (2021-2032)

4.6 Middle East & Africa HILIC Chromatography Media Consumption Value (2021-2032)

5 MARKET SEGMENT BY TYPE

5.1 Global HILIC Chromatography Media Sales Quantity by Type (2021-2032)

5.2 Global HILIC Chromatography Media Consumption Value by Type (2021-2032)

5.3 Global HILIC Chromatography Media Average Price by Type (2021-2032)

6 MARKET SEGMENT BY APPLICATION

6.1 Global HILIC Chromatography Media Sales Quantity by Application (2021-2032)

6.2 Global HILIC Chromatography Media Consumption Value by Application (2021-2032)

6.3 Global HILIC Chromatography Media Average Price by Application (2021-2032)

7 NORTH AMERICA

- 7.1 North America HILIC Chromatography Media Sales Quantity by Type (2021-2032)
- 7.2 North America HILIC Chromatography Media Sales Quantity by Application (2021-2032)
- 7.3 North America HILIC Chromatography Media Market Size by Country
 - 7.3.1 North America HILIC Chromatography Media Sales Quantity by Country (2021-2032)
 - 7.3.2 North America HILIC Chromatography Media Consumption Value by Country (2021-2032)
 - 7.3.3 United States Market Size and Forecast (2021-2032)
 - 7.3.4 Canada Market Size and Forecast (2021-2032)
 - 7.3.5 Mexico Market Size and Forecast (2021-2032)

8 EUROPE

- 8.1 Europe HILIC Chromatography Media Sales Quantity by Type (2021-2032)
- 8.2 Europe HILIC Chromatography Media Sales Quantity by Application (2021-2032)
- 8.3 Europe HILIC Chromatography Media Market Size by Country
 - 8.3.1 Europe HILIC Chromatography Media Sales Quantity by Country (2021-2032)
 - 8.3.2 Europe HILIC Chromatography Media Consumption Value by Country (2021-2032)
 - 8.3.3 Germany Market Size and Forecast (2021-2032)
 - 8.3.4 France Market Size and Forecast (2021-2032)
 - 8.3.5 United Kingdom Market Size and Forecast (2021-2032)
 - 8.3.6 Russia Market Size and Forecast (2021-2032)
 - 8.3.7 Italy Market Size and Forecast (2021-2032)

9 ASIA-PACIFIC

- 9.1 Asia-Pacific HILIC Chromatography Media Sales Quantity by Type (2021-2032)
- 9.2 Asia-Pacific HILIC Chromatography Media Sales Quantity by Application (2021-2032)
- 9.3 Asia-Pacific HILIC Chromatography Media Market Size by Region
 - 9.3.1 Asia-Pacific HILIC Chromatography Media Sales Quantity by Region (2021-2032)
 - 9.3.2 Asia-Pacific HILIC Chromatography Media Consumption Value by Region (2021-2032)
 - 9.3.3 China Market Size and Forecast (2021-2032)
 - 9.3.4 Japan Market Size and Forecast (2021-2032)
 - 9.3.5 South Korea Market Size and Forecast (2021-2032)

9.3.6 India Market Size and Forecast (2021-2032)

9.3.7 Southeast Asia Market Size and Forecast (2021-2032)

9.3.8 Australia Market Size and Forecast (2021-2032)

10 SOUTH AMERICA

10.1 South America HILIC Chromatography Media Sales Quantity by Type (2021-2032)

10.2 South America HILIC Chromatography Media Sales Quantity by Application (2021-2032)

10.3 South America HILIC Chromatography Media Market Size by Country

10.3.1 South America HILIC Chromatography Media Sales Quantity by Country (2021-2032)

10.3.2 South America HILIC Chromatography Media Consumption Value by Country (2021-2032)

10.3.3 Brazil Market Size and Forecast (2021-2032)

10.3.4 Argentina Market Size and Forecast (2021-2032)

11 MIDDLE EAST & AFRICA

11.1 Middle East & Africa HILIC Chromatography Media Sales Quantity by Type (2021-2032)

11.2 Middle East & Africa HILIC Chromatography Media Sales Quantity by Application (2021-2032)

11.3 Middle East & Africa HILIC Chromatography Media Market Size by Country

11.3.1 Middle East & Africa HILIC Chromatography Media Sales Quantity by Country (2021-2032)

11.3.2 Middle East & Africa HILIC Chromatography Media Consumption Value by Country (2021-2032)

11.3.3 Turkey Market Size and Forecast (2021-2032)

11.3.4 Egypt Market Size and Forecast (2021-2032)

11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)

11.3.6 South Africa Market Size and Forecast (2021-2032)

12 MARKET DYNAMICS

12.1 HILIC Chromatography Media Market Drivers

12.2 HILIC Chromatography Media Market Restraints

12.3 HILIC Chromatography Media Trends Analysis

12.4 Porters Five Forces Analysis

- 12.4.1 Threat of New Entrants
- 12.4.2 Bargaining Power of Suppliers
- 12.4.3 Bargaining Power of Buyers
- 12.4.4 Threat of Substitutes
- 12.4.5 Competitive Rivalry

13 RAW MATERIAL AND INDUSTRY CHAIN

- 13.1 Raw Material of HILIC Chromatography Media and Key Manufacturers
- 13.2 Manufacturing Costs Percentage of HILIC Chromatography Media
- 13.3 HILIC Chromatography Media Production Process
- 13.4 Industry Value Chain Analysis

14 SHIPMENTS BY DISTRIBUTION CHANNEL

- 14.1 Sales Channel
 - 14.1.1 Direct to End-User
 - 14.1.2 Distributors
- 14.2 HILIC Chromatography Media Typical Distributors
- 14.3 HILIC Chromatography Media Typical Customers

15 RESEARCH FINDINGS AND CONCLUSION

16 APPENDIX

- 16.1 Methodology
- 16.2 Research Process and Data Source
- 16.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. Global HILIC Chromatography Media Consumption Value by Type, (USD Million), 2021 & 2025 & 2032

Table 2. Global HILIC Chromatography Media Consumption Value by Matrix and Particle Structure, (USD Million), 2021 & 2025 & 2032

Table 3. Global HILIC Chromatography Media Consumption Value by Particle Size Grade, (USD Million), 2021 & 2025 & 2032

Table 4. Global HILIC Chromatography Media Consumption Value by Pore Size Grade, (USD Million), 2021 & 2025 & 2032

Table 5. Global HILIC Chromatography Media Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Table 6. Merck Basic Information, Manufacturing Base and Competitors

Table 7. Merck Major Business

Table 8. Merck HILIC Chromatography Media Product and Services

Table 9. Merck HILIC Chromatography Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 10. Merck Recent Developments/Updates

Table 11. Waters Basic Information, Manufacturing Base and Competitors

Table 12. Waters Major Business

Table 13. Waters HILIC Chromatography Media Product and Services

Table 14. Waters HILIC Chromatography Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 15. Waters Recent Developments/Updates

Table 16. Agilent Technologies Basic Information, Manufacturing Base and Competitors

Table 17. Agilent Technologies Major Business

Table 18. Agilent Technologies HILIC Chromatography Media Product and Services

Table 19. Agilent Technologies HILIC Chromatography Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 20. Agilent Technologies Recent Developments/Updates

Table 21. Thermo Fisher Scientific Basic Information, Manufacturing Base and Competitors

Table 22. Thermo Fisher Scientific Major Business

Table 23. Thermo Fisher Scientific HILIC Chromatography Media Product and Services

Table 24. Thermo Fisher Scientific HILIC Chromatography Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share

(2021-2026)

Table 25. Thermo Fisher Scientific Recent Developments/Updates

Table 26. Phenomenex Basic Information, Manufacturing Base and Competitors

Table 27. Phenomenex Major Business

Table 28. Phenomenex HILIC Chromatography Media Product and Services

Table 29. Phenomenex HILIC Chromatography Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 30. Phenomenex Recent Developments/Updates

Table 31. Tosoh Bioscience Basic Information, Manufacturing Base and Competitors

Table 32. Tosoh Bioscience Major Business

Table 33. Tosoh Bioscience HILIC Chromatography Media Product and Services

Table 34. Tosoh Bioscience HILIC Chromatography Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 35. Tosoh Bioscience Recent Developments/Updates

Table 36. YMC Basic Information, Manufacturing Base and Competitors

Table 37. YMC Major Business

Table 38. YMC HILIC Chromatography Media Product and Services

Table 39. YMC HILIC Chromatography Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 40. YMC Recent Developments/Updates

Table 41. GL Sciences Basic Information, Manufacturing Base and Competitors

Table 42. GL Sciences Major Business

Table 43. GL Sciences HILIC Chromatography Media Product and Services

Table 44. GL Sciences HILIC Chromatography Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 45. GL Sciences Recent Developments/Updates

Table 46. HILICON Basic Information, Manufacturing Base and Competitors

Table 47. HILICON Major Business

Table 48. HILICON HILIC Chromatography Media Product and Services

Table 49. HILICON HILIC Chromatography Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 50. HILICON Recent Developments/Updates

Table 51. Sepax Technologies Basic Information, Manufacturing Base and Competitors

Table 52. Sepax Technologies Major Business

Table 53. Sepax Technologies HILIC Chromatography Media Product and Services

Table 54. Sepax Technologies HILIC Chromatography Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 55. Sepax Technologies Recent Developments/Updates

Table 56. SIELC Technologies Basic Information, Manufacturing Base and Competitors

Table 57. SIELC Technologies Major Business

Table 58. SIELC Technologies HILIC Chromatography Media Product and Services

Table 59. SIELC Technologies HILIC Chromatography Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 60. SIELC Technologies Recent Developments/Updates

Table 61. Macherey-Nagel Basic Information, Manufacturing Base and Competitors

Table 62. Macherey-Nagel Major Business

Table 63. Macherey-Nagel HILIC Chromatography Media Product and Services

Table 64. Macherey-Nagel HILIC Chromatography Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 65. Macherey-Nagel Recent Developments/Updates

Table 66. Restek Basic Information, Manufacturing Base and Competitors

Table 67. Restek Major Business

Table 68. Restek HILIC Chromatography Media Product and Services

Table 69. Restek HILIC Chromatography Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 70. Restek Recent Developments/Updates

Table 71. Avantor ACE Basic Information, Manufacturing Base and Competitors

Table 72. Avantor ACE Major Business

Table 73. Avantor ACE HILIC Chromatography Media Product and Services

Table 74. Avantor ACE HILIC Chromatography Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 75. Avantor ACE Recent Developments/Updates

Table 76. Osaka Soda Basic Information, Manufacturing Base and Competitors

Table 77. Osaka Soda Major Business

Table 78. Osaka Soda HILIC Chromatography Media Product and Services

Table 79. Osaka Soda HILIC Chromatography Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 80. Osaka Soda Recent Developments/Updates

Table 81. NanoMicro Technology Basic Information, Manufacturing Base and Competitors

Table 82. NanoMicro Technology Major Business

Table 83. NanoMicro Technology HILIC Chromatography Media Product and Services

Table 84. NanoMicro Technology HILIC Chromatography Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. NanoMicro Technology Recent Developments/Updates

Table 86. Nouryon Basic Information, Manufacturing Base and Competitors
Table 87. Nouryon Major Business
Table 88. Nouryon HILIC Chromatography Media Product and Services
Table 89. Nouryon HILIC Chromatography Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 90. Nouryon Recent Developments/Updates
Table 91. Welch Materials Basic Information, Manufacturing Base and Competitors
Table 92. Welch Materials Major Business
Table 93. Welch Materials HILIC Chromatography Media Product and Services
Table 94. Welch Materials HILIC Chromatography Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 95. Welch Materials Recent Developments/Updates
Table 96. Dikma Technologies Basic Information, Manufacturing Base and Competitors
Table 97. Dikma Technologies Major Business
Table 98. Dikma Technologies HILIC Chromatography Media Product and Services
Table 99. Dikma Technologies HILIC Chromatography Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 100. Dikma Technologies Recent Developments/Updates
Table 101. SiliCycle Basic Information, Manufacturing Base and Competitors
Table 102. SiliCycle Major Business
Table 103. SiliCycle HILIC Chromatography Media Product and Services
Table 104. SiliCycle HILIC Chromatography Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 105. SiliCycle Recent Developments/Updates
Table 106. Dr. Maisch Basic Information, Manufacturing Base and Competitors
Table 107. Dr. Maisch Major Business
Table 108. Dr. Maisch HILIC Chromatography Media Product and Services
Table 109. Dr. Maisch HILIC Chromatography Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 110. Dr. Maisch Recent Developments/Updates
Table 111. Nacalai Tesque Basic Information, Manufacturing Base and Competitors
Table 112. Nacalai Tesque Major Business
Table 113. Nacalai Tesque HILIC Chromatography Media Product and Services
Table 114. Nacalai Tesque HILIC Chromatography Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 115. Nacalai Tesque Recent Developments/Updates
Table 116. Advanced Materials Technology Basic Information, Manufacturing Base and Competitors

Table 117. Advanced Materials Technology Major Business

Table 118. Advanced Materials Technology HILIC Chromatography Media Product and Services

Table 119. Advanced Materials Technology HILIC Chromatography Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 120. Advanced Materials Technology Recent Developments/Updates

Table 121. Fortis Technologies Basic Information, Manufacturing Base and Competitors

Table 122. Fortis Technologies Major Business

Table 123. Fortis Technologies HILIC Chromatography Media Product and Services

Table 124. Fortis Technologies HILIC Chromatography Media Sales Quantity (kg), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 125. Fortis Technologies Recent Developments/Updates

Table 126. Global HILIC Chromatography Media Sales Quantity by Manufacturer (2021-2026) & (kg)

Table 127. Global HILIC Chromatography Media Revenue by Manufacturer (2021-2026) & (USD Million)

Table 128. Global HILIC Chromatography Media Average Price by Manufacturer (2021-2026) & (US\$/kg)

Table 129. Market Position of Manufacturers in HILIC Chromatography Media, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025

Table 130. Head Office and HILIC Chromatography Media Production Site of Key Manufacturer

Table 131. HILIC Chromatography Media Market: Company Product Type Footprint

Table 132. HILIC Chromatography Media Market: Company Product Application Footprint

Table 133. HILIC Chromatography Media New Market Entrants and Barriers to Market Entry

Table 134. HILIC Chromatography Media Mergers, Acquisition, Agreements, and Collaborations

Table 135. Global HILIC Chromatography Media Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR

Table 136. Global HILIC Chromatography Media Sales Quantity by Region (2021-2026) & (kg)

Table 137. Global HILIC Chromatography Media Sales Quantity by Region (2027-2032) & (kg)

Table 138. Global HILIC Chromatography Media Consumption Value by Region (2021-2026) & (USD Million)

Table 139. Global HILIC Chromatography Media Consumption Value by Region (2027-2032) & (USD Million)

Table 140. Global HILIC Chromatography Media Average Price by Region (2021-2026) & (US\$/kg)

Table 141. Global HILIC Chromatography Media Average Price by Region (2027-2032) & (US\$/kg)

Table 142. Global HILIC Chromatography Media Sales Quantity by Type (2021-2026) & (kg)

Table 143. Global HILIC Chromatography Media Sales Quantity by Type (2027-2032) & (kg)

Table 144. Global HILIC Chromatography Media Consumption Value by Type (2021-2026) & (USD Million)

Table 145. Global HILIC Chromatography Media Consumption Value by Type (2027-2032) & (USD Million)

Table 146. Global HILIC Chromatography Media Average Price by Type (2021-2026) & (US\$/kg)

Table 147. Global HILIC Chromatography Media Average Price by Type (2027-2032) & (US\$/kg)

Table 148. Global HILIC Chromatography Media Sales Quantity by Application (2021-2026) & (kg)

Table 149. Global HILIC Chromatography Media Sales Quantity by Application (2027-2032) & (kg)

Table 150. Global HILIC Chromatography Media Consumption Value by Application (2021-2026) & (USD Million)

Table 151. Global HILIC Chromatography Media Consumption Value by Application (2027-2032) & (USD Million)

Table 152. Global HILIC Chromatography Media Average Price by Application (2021-2026) & (US\$/kg)

Table 153. Global HILIC Chromatography Media Average Price by Application (2027-2032) & (US\$/kg)

Table 154. North America HILIC Chromatography Media Sales Quantity by Type (2021-2026) & (kg)

Table 155. North America HILIC Chromatography Media Sales Quantity by Type (2027-2032) & (kg)

Table 156. North America HILIC Chromatography Media Sales Quantity by Application (2021-2026) & (kg)

Table 157. North America HILIC Chromatography Media Sales Quantity by Application (2027-2032) & (kg)

Table 158. North America HILIC Chromatography Media Sales Quantity by Country

(2021-2026) & (kg)

Table 159. North America HILIC Chromatography Media Sales Quantity by Country (2027-2032) & (kg)

Table 160. North America HILIC Chromatography Media Consumption Value by Country (2021-2026) & (USD Million)

Table 161. North America HILIC Chromatography Media Consumption Value by Country (2027-2032) & (USD Million)

Table 162. Europe HILIC Chromatography Media Sales Quantity by Type (2021-2026) & (kg)

Table 163. Europe HILIC Chromatography Media Sales Quantity by Type (2027-2032) & (kg)

Table 164. Europe HILIC Chromatography Media Sales Quantity by Application (2021-2026) & (kg)

Table 165. Europe HILIC Chromatography Media Sales Quantity by Application (2027-2032) & (kg)

Table 166. Europe HILIC Chromatography Media Sales Quantity by Country (2021-2026) & (kg)

Table 167. Europe HILIC Chromatography Media Sales Quantity by Country (2027-2032) & (kg)

Table 168. Europe HILIC Chromatography Media Consumption Value by Country (2021-2026) & (USD Million)

Table 169. Europe HILIC Chromatography Media Consumption Value by Country (2027-2032) & (USD Million)

Table 170. Asia-Pacific HILIC Chromatography Media Sales Quantity by Type (2021-2026) & (kg)

Table 171. Asia-Pacific HILIC Chromatography Media Sales Quantity by Type (2027-2032) & (kg)

Table 172. Asia-Pacific HILIC Chromatography Media Sales Quantity by Application (2021-2026) & (kg)

Table 173. Asia-Pacific HILIC Chromatography Media Sales Quantity by Application (2027-2032) & (kg)

Table 174. Asia-Pacific HILIC Chromatography Media Sales Quantity by Region (2021-2026) & (kg)

Table 175. Asia-Pacific HILIC Chromatography Media Sales Quantity by Region (2027-2032) & (kg)

Table 176. Asia-Pacific HILIC Chromatography Media Consumption Value by Region (2021-2026) & (USD Million)

Table 177. Asia-Pacific HILIC Chromatography Media Consumption Value by Region (2027-2032) & (USD Million)

Table 178. South America HILIC Chromatography Media Sales Quantity by Type (2021-2026) & (kg)

Table 179. South America HILIC Chromatography Media Sales Quantity by Type (2027-2032) & (kg)

Table 180. South America HILIC Chromatography Media Sales Quantity by Application (2021-2026) & (kg)

Table 181. South America HILIC Chromatography Media Sales Quantity by Application (2027-2032) & (kg)

Table 182. South America HILIC Chromatography Media Sales Quantity by Country (2021-2026) & (kg)

Table 183. South America HILIC Chromatography Media Sales Quantity by Country (2027-2032) & (kg)

Table 184. South America HILIC Chromatography Media Consumption Value by Country (2021-2026) & (USD Million)

Table 185. South America HILIC Chromatography Media Consumption Value by Country (2027-2032) & (USD Million)

Table 186. Middle East & Africa HILIC Chromatography Media Sales Quantity by Type (2021-2026) & (kg)

Table 187. Middle East & Africa HILIC Chromatography Media Sales Quantity by Type (2027-2032) & (kg)

Table 188. Middle East & Africa HILIC Chromatography Media Sales Quantity by Application (2021-2026) & (kg)

Table 189. Middle East & Africa HILIC Chromatography Media Sales Quantity by Application (2027-2032) & (kg)

Table 190. Middle East & Africa HILIC Chromatography Media Sales Quantity by Country (2021-2026) & (kg)

Table 191. Middle East & Africa HILIC Chromatography Media Sales Quantity by Country (2027-2032) & (kg)

Table 192. Middle East & Africa HILIC Chromatography Media Consumption Value by Country (2021-2026) & (USD Million)

Table 193. Middle East & Africa HILIC Chromatography Media Consumption Value by Country (2027-2032) & (USD Million)

Table 194. HILIC Chromatography Media Raw Material

Table 195. Key Manufacturers of HILIC Chromatography Media Raw Materials

Table 196. HILIC Chromatography Media Typical Distributors

Table 197. HILIC Chromatography Media Typical Customers

List Of Figures

LIST OF FIGURES

Figure 1. HILIC Chromatography Media Picture

Figure 2. Global HILIC Chromatography Media Revenue by Type, (USD Million), 2021 & 2025 & 2032

Figure 3. Global HILIC Chromatography Media Revenue Market Share by Type in 2025

Figure 4. Bare Silica HILIC Examples

Figure 5. Diol HILIC Examples

Figure 6. Amide HILIC Examples

Figure 7. Amino HILIC Examples

Figure 8. Zwitterionic HILIC Examples

Figure 9. Mixed-Mode HILIC Examples

Figure 10. Polymer-Based HILIC Examples

Figure 11. Polymer-Based HILIC Examples

Figure 12. Global HILIC Chromatography Media Revenue by Matrix and Particle Structure, (USD Million), 2021 & 2025 & 2032

Figure 13. Global HILIC Chromatography Media Revenue Market Share by Matrix and Particle Structure in 2025

Figure 14. Fully Porous Silica Examples

Figure 15. Core-Shell Silica Examples

Figure 16. Hybrid Organic-Inorganic Particles Examples

Figure 17. Polymer Particles Examples

Figure 18. Monodisperse Silica Examples

Figure 19. Monolithic Media Examples

Figure 20. Global HILIC Chromatography Media Revenue by Particle Size Grade, (USD Million), 2021 & 2025 & 2032

Figure 21. Global HILIC Chromatography Media Revenue Market Share by Particle Size Grade in 2025

Figure 22. Sub-2 μ m UHPLC Grade Examples

Figure 23. 2-3 μ m High-Efficiency Grade Examples

Figure 24. 3-5 μ m Analytical HPLC Grade Examples

Figure 25. 5-10 μ m Semi-Preparative Grade Examples

Figure 26. >10 μ m Preparative and Bulk Grade Examples

Figure 27. Global HILIC Chromatography Media Revenue by Pore Size Grade, (USD Million), 2021 & 2025 & 2032

Figure 28. Global HILIC Chromatography Media Revenue Market Share by Pore Size Grade in 2025

- Figure 29. 60-80 ? Small-Pore Grade Examples
- Figure 30. 90-120 ? Standard-Pore Grade Examples
- Figure 31. 150-200 ? Medium-Pore Grade Examples
- Figure 32. 300 ? Wide-Pore Grade Examples
- Figure 33. Non-Porous and Proprietary Grade Examples
- Figure 34. Global HILIC Chromatography Media Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
- Figure 35. Global HILIC Chromatography Media Revenue Market Share by Application in 2025
- Figure 36. Pharmaceutical Quality Control Examples
- Figure 37. Biopharmaceutical Glycan Analysis Examples
- Figure 38. Metabolomics and Lipidomics Examples
- Figure 39. Clinical Bioanalysis Examples
- Figure 40. Food and Environmental Testing Examples
- Figure 41. Preparative Purification and Other Examples
- Figure 42. Global HILIC Chromatography Media Consumption Value, (USD Million): 2021 & 2025 & 2032
- Figure 43. Global HILIC Chromatography Media Consumption Value and Forecast (2021-2032) & (USD Million)
- Figure 44. Global HILIC Chromatography Media Sales Quantity (2021-2032) & (kg)
- Figure 45. Global HILIC Chromatography Media Price (2021-2032) & (US\$/kg)
- Figure 46. Global HILIC Chromatography Media Sales Quantity Market Share by Manufacturer in 2025
- Figure 47. Global HILIC Chromatography Media Revenue Market Share by Manufacturer in 2025
- Figure 48. Producer Shipments of HILIC Chromatography Media by Manufacturer Sales (\$MM) and Market Share (%): 2025
- Figure 49. Top 3 HILIC Chromatography Media Manufacturer (Revenue) Market Share in 2025
- Figure 50. Top 6 HILIC Chromatography Media Manufacturer (Revenue) Market Share in 2025
- Figure 51. Global HILIC Chromatography Media Sales Quantity Market Share by Region (2021-2032)
- Figure 52. Global HILIC Chromatography Media Consumption Value Market Share by Region (2021-2032)
- Figure 53. North America HILIC Chromatography Media Consumption Value (2021-2032) & (USD Million)
- Figure 54. Europe HILIC Chromatography Media Consumption Value (2021-2032) & (USD Million)

Figure 55. Asia-Pacific HILIC Chromatography Media Consumption Value (2021-2032) & (USD Million)

Figure 56. South America HILIC Chromatography Media Consumption Value (2021-2032) & (USD Million)

Figure 57. Middle East & Africa HILIC Chromatography Media Consumption Value (2021-2032) & (USD Million)

Figure 58. Global HILIC Chromatography Media Sales Quantity Market Share by Type (2021-2032)

Figure 59. Global HILIC Chromatography Media Consumption Value Market Share by Type (2021-2032)

Figure 60. Global HILIC Chromatography Media Average Price by Type (2021-2032) & (US\$/kg)

Figure 61. Global HILIC Chromatography Media Sales Quantity Market Share by Application (2021-2032)

Figure 62. Global HILIC Chromatography Media Revenue Market Share by Application (2021-2032)

Figure 63. Global HILIC Chromatography Media Average Price by Application (2021-2032) & (US\$/kg)

Figure 64. North America HILIC Chromatography Media Sales Quantity Market Share by Type (2021-2032)

Figure 65. North America HILIC Chromatography Media Sales Quantity Market Share by Application (2021-2032)

Figure 66. North America HILIC Chromatography Media Sales Quantity Market Share by Country (2021-2032)

Figure 67. North America HILIC Chromatography Media Consumption Value Market Share by Country (2021-2032)

Figure 68. United States HILIC Chromatography Media Consumption Value (2021-2032) & (USD Million)

Figure 69. Canada HILIC Chromatography Media Consumption Value (2021-2032) & (USD Million)

Figure 70. Mexico HILIC Chromatography Media Consumption Value (2021-2032) & (USD Million)

Figure 71. Europe HILIC Chromatography Media Sales Quantity Market Share by Type (2021-2032)

Figure 72. Europe HILIC Chromatography Media Sales Quantity Market Share by Application (2021-2032)

Figure 73. Europe HILIC Chromatography Media Sales Quantity Market Share by Country (2021-2032)

Figure 74. Europe HILIC Chromatography Media Consumption Value Market Share by

Country (2021-2032)

Figure 75. Germany HILIC Chromatography Media Consumption Value (2021-2032) & (USD Million)

Figure 76. France HILIC Chromatography Media Consumption Value (2021-2032) & (USD Million)

Figure 77. United Kingdom HILIC Chromatography Media Consumption Value (2021-2032) & (USD Million)

Figure 78. Russia HILIC Chromatography Media Consumption Value (2021-2032) & (USD Million)

Figure 79. Italy HILIC Chromatography Media Consumption Value (2021-2032) & (USD Million)

Figure 80. Asia-Pacific HILIC Chromatography Media Sales Quantity Market Share by Type (2021-2032)

Figure 81. Asia-Pacific HILIC Chromatography Media Sales Quantity Market Share by Application (2021-2032)

Figure 82. Asia-Pacific HILIC Chromatography Media Sales Quantity Market Share by Region (2021-2032)

Figure 83. Asia-Pacific HILIC Chromatography Media Consumption Value Market Share by Region (2021-2032)

Figure 84. China HILIC Chromatography Media Consumption Value (2021-2032) & (USD Million)

Figure 85. Japan HILIC Chromatography Media Consumption Value (2021-2032) & (USD Million)

Figure 86. South Korea HILIC Chromatography Media Consumption Value (2021-2032) & (USD Million)

Figure 87. India HILIC Chromatography Media Consumption Value (2021-2032) & (USD Million)

Figure 88. Southeast Asia HILIC Chromatography Media Consumption Value (2021-2032) & (USD Million)

Figure 89. Australia HILIC Chromatography Media Consumption Value (2021-2032) & (USD Million)

Figure 90. South America HILIC Chromatography Media Sales Quantity Market Share by Type (2021-2032)

Figure 91. South America HILIC Chromatography Media Sales Quantity Market Share by Application (2021-2032)

Figure 92. South America HILIC Chromatography Media Sales Quantity Market Share by Country (2021-2032)

Figure 93. South America HILIC Chromatography Media Consumption Value Market Share by Country (2021-2032)

Figure 94. Brazil HILIC Chromatography Media Consumption Value (2021-2032) & (USD Million)

Figure 95. Argentina HILIC Chromatography Media Consumption Value (2021-2032) & (USD Million)

Figure 96. Middle East & Africa HILIC Chromatography Media Sales Quantity Market Share by Type (2021-2032)

Figure 97. Middle East & Africa HILIC Chromatography Media Sales Quantity Market Share by Application (2021-2032)

Figure 98. Middle East & Africa HILIC Chromatography Media Sales Quantity Market Share by Country (2021-2032)

Figure 99. Middle East & Africa HILIC Chromatography Media Consumption Value Market Share by Country (2021-2032)

Figure 100. Turkey HILIC Chromatography Media Consumption Value (2021-2032) & (USD Million)

Figure 101. Egypt HILIC Chromatography Media Consumption Value (2021-2032) & (USD Million)

Figure 102. Saudi Arabia HILIC Chromatography Media Consumption Value (2021-2032) & (USD Million)

Figure 103. South Africa HILIC Chromatography Media Consumption Value (2021-2032) & (USD Million)

Figure 104. HILIC Chromatography Media Market Drivers

Figure 105. HILIC Chromatography Media Market Restraints

Figure 106. HILIC Chromatography Media Market Trends

Figure 107. Porters Five Forces Analysis

Figure 108. Manufacturing Cost Structure Analysis of HILIC Chromatography Media in 2025

Figure 109. Manufacturing Process Analysis of HILIC Chromatography Media

Figure 110. HILIC Chromatography Media Industrial Chain

Figure 111. Sales Channel: Direct to End-User vs Distributors

Figure 112. Direct Channel Pros & Cons

Figure 113. Indirect Channel Pros & Cons

Figure 114. Methodology

Figure 115. Research Process and Data Source

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