

Global HILIC Chromatography Media Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global HILIC Chromatography Media market size is expected to reach \$ 118 million by 2032, rising at a market growth of 4.7% CAGR during the forecast period (2026-2032).

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 studies the global HILIC Chromatography Media production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global HILIC Chromatography Media total production and demand, 2021-2032, (kg)

Global HILIC Chromatography Media total production value, 2021-2032, (USD Million)

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

Global HILIC Chromatography Media consumption by region & country, CAGR, 2021-2032 & (kg)

U.S. VS China: HILIC Chromatography Media domestic production, consumption, key domestic manufacturers and share

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

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

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

This report profiles key players in the global HILIC Chromatography Media 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, 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World HILIC Chromatography Media 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 HILIC Chromatography Media Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global HILIC Chromatography Media Market, Segmentation by Type:

Bare Silica HILIC

Diol HILIC

Amide HILIC

Amino HILIC

Zwitterionic HILIC

Mixed-Mode HILIC

Polymer-Based HILIC

Global HILIC Chromatography Media Market, Segmentation by Matrix and Particle Structure:

Fully Porous Silica

Core-Shell Silica

Hybrid Organic-Inorganic Particles

Polymer Particles

Monodisperse Silica

Monolithic Media

Global HILIC Chromatography Media Market, Segmentation 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 ?m Preparative and Bulk Grade

Global HILIC Chromatography Media Market, Segmentation by Pore Size Grade:

60-80 ? Small-Pore Grade

90-120 ? Standard-Pore Grade

150-200 ? Medium-Pore Grade

300 ? Wide-Pore Grade

Non-Porous and Proprietary Grade

Global HILIC Chromatography Media Market, Segmentation by Application:

Pharmaceutical Quality Control

Biopharmaceutical Glycan Analysis

Metabolomics and Lipidomics

Clinical Bioanalysis

Food and Environmental Testing

Preparative Purification and Other

Companies Profiled:

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

Key Questions Answered:

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

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