

Global Monolithic Chromatography Column Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G98FB410F8ECEN.html>

Date: July 2026

Pages: 98

Price: US\$ 4,480.00 (Single User License)

ID: G98FB410F8ECEN

Abstracts

The global Monolithic Chromatography Column market size is expected to reach \$ 1014 million by 2032, rising at a market growth of 16.6% CAGR during the forecast period (2026-2032).

Monolithic chromatography columns are separation columns in which a continuous porous stationary phase replaces traditional packed beds of particulate media. Common formats include silica-based monoliths and polymer-based monoliths, which feature a bimodal pore architecture consisting of large flow-through channels and mesoporous structures. This design enables convective mass transfer, resulting in low backpressure, high flow rates, and short diffusion distances. These columns are used in high-performance liquid chromatography (HPLC), rapid bioanalysis of macromolecules, and purification workflows for antibodies, plasmids, viral vectors, vaccines, and virus particles. Their main advantages include high throughput, low column-to-column variability, and relatively straightforward scale-up pathways. The estimated gross margin is approximately 62%.

Demand for monolithic columns is primarily driven by the growing needs of biopharmaceutical analytics and advanced therapy purification. Large biomolecules such as antibodies, viral vectors, plasmid DNA, and mRNA intermediates require faster mass transfer than conventional bead-based resins can provide. Monolithic structures, relying on convective flow rather than intraparticle diffusion, significantly reduce analysis and processing time while improving method robustness during early-stage development and analytical workflows.

On the supply side, silica monoliths are mainly used for small molecules and peptide/protein fast analysis, while polymer monoliths are more suitable for large

biomolecules such as viruses, plasmids, and high-molecular-weight proteins. Procurement decisions are typically based on matrix type, separation mode, column dimensions, dynamic binding capacity, pressure tolerance, cleaning durability, and compatibility with existing LC or chromatography systems.

This segment remains a high-value niche within chromatography columns. The number of suppliers is smaller than for conventional particulate columns, but pricing and technical barriers are higher. Future growth depends largely on the transition of advanced therapy programs from R&D to clinical and commercial production, while analytical monolithic columns are expected to maintain steady demand in high-throughput quality control, complex sample screening, and LC-MS workflows.

This report studies the global Monolithic Chromatography Column production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Monolithic Chromatography Column total production and demand, 2021-2032, (Units)

Global Monolithic Chromatography Column total production value, 2021-2032, (USD Million)

Global Monolithic Chromatography Column production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Monolithic Chromatography Column consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Monolithic Chromatography Column domestic production, consumption, key domestic manufacturers and share

Global Monolithic Chromatography Column production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Monolithic Chromatography Column production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Monolithic Chromatography Column production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Monolithic Chromatography Column 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 Sartorius, Merck, Agilent Technologies, Thermo Fisher Scientific, Phenomenex, GL Sciences, Bio-Rad, Kyoto Monotech, 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 Monolithic Chromatography Column market

Detailed Segmentation:

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

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Monolithic Chromatography Column Market, Segmentation by Type:

Silica Monolithic Columns

Polymer Monolithic Columns

Hybrid Monolithic Columns

Other Monolithic Columns

Global Monolithic Chromatography Column Market, Segmentation by Separation Mode:

Reversed-Phase Monolithic Columns

Ion-Exchange Monolithic Columns

Affinity Monolithic Columns

HILIC and Normal-Phase Monolithic Columns

Other Separation Modes

Global Monolithic Chromatography Column Market, Segmentation by Operating Scale:

Analytical Monolithic Columns

Capillary and Nano Monolithic Columns

Preparative Monolithic Columns

Process-Scale Monolithic Columns

Global Monolithic Chromatography Column Market, Segmentation by Column Format:

Standard-Bore HPLC Columns

Narrow-Bore HPLC Columns

Capillary Columns

Short Disk Columns

Large-Volume Modules

Custom Columns

Global Monolithic Chromatography Column Market, Segmentation by Application:

Small-Molecule Rapid Analysis

Peptide and Protein LC-MS

Antibody Titer and Charge Variant Analysis

Plasmid and Viral Vector Purification

Vaccine and Virus Purification

Method Development and Screening

Companies Profiled:

Sartorius

Merck

Agilent Technologies

Thermo Fisher Scientific

Phenomenex

GL Sciences

Bio-Rad

Kyoto Monotech

Key Questions Answered:

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

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