

Global Phenyl Reversed-Phase Chromatography Packing Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Phenyl Reversed-Phase Chromatography Packing market size is expected to reach \$ 158 million by 2032, rising at a market growth of 5.9% CAGR during the forecast period (2026-2032).

Phenyl reversed-phase chromatography media are stationary phases based on high-purity silica, hybrid silica, polymer-coated silica, or limited polymer microsphere supports. Aromatic ligands such as phenyl, phenyl-hexyl, phenyl-butyl, and biphenyl groups are covalently bonded to the particle surface, forming a reversed-phase liquid chromatography material. These media are widely used in HPLC, UHPLC analysis, method development, and certain preparative purification applications. Compared with C18 phases, phenyl columns typically exhibit weaker hydrophobic retention but provide additional π - π interactions, dipole interactions, and shape selectivity, making them suitable for separating aromatic compounds, conjugated systems, isomers, polar drug impurities, and natural products. The estimated gross margin is approximately 58%.

Phenyl reversed-phase media are not a general replacement for C18 columns, but rather a selectivity-oriented complementary tool in chromatographic method development. Increasing complexity in drug impurity profiles, isomeric compounds, aromatic analytes, and natural product matrices has driven stable demand for phenyl, phenyl-hexyl, and biphenyl stationary phases across pharmaceutical development, food safety testing, environmental analysis, and research laboratories.

Market growth is primarily driven by two factors: (1) UHPLC and high-throughput analytical workflows requiring smaller particle sizes, core-shell architectures, and low column bleed materials; (2) increased regulatory and development requirements for

robust, transferable, and validated methods in innovative drug pipelines and generic drug equivalence studies. Customers increasingly evaluate batch reproducibility, pH stability range, column efficiency, peak shape, and orthogonal selectivity relative to C18, rather than focusing on per-column cost alone.

The competitive landscape remains dominated by global chromatography suppliers, with advantages in silica engineering, bonding chemistry, application databases, and regulatory validation experience. Domestic manufacturers have opportunities in standard analytical columns and preparative media; however, high-end UHPLC phenyl phases, small-particle high-stability materials, and bio-compatible wide-pore systems still require long-term performance data and extensive application validation to achieve broader market trust.

This report studies the global Phenyl Reversed-Phase Chromatography Packing production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Phenyl Reversed-Phase Chromatography Packing total production and demand, 2021-2032, (kg)

Global Phenyl Reversed-Phase Chromatography Packing total production value, 2021-2032, (USD Million)

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

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

U.S. VS China: Phenyl Reversed-Phase Chromatography Packing domestic production, consumption, key domestic manufacturers and share

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

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

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

This report profiles key players in the global Phenyl Reversed-Phase 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 Waters, Agilent Technologies, Thermo Fisher Scientific, Phenomenex, Merck, YMC, GL Sciences, Shimadzu, Sepax Technologies, Welch Materials, 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 Phenyl Reversed-Phase 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 Phenyl Reversed-Phase Chromatography Packing Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Phenyl Reversed-Phase Chromatography Packing Market, Segmentation by Type:

Phenyl

Phenyl-Hexyl

Phenyl-Butyl

Biphenyl

Diphenyl

Fluorophenyl/PFP

Phenyl-Ether

Global Phenyl Reversed-Phase Chromatography Packing Market, Segmentation by Matrix Type:

Silica-Based

Hybrid Silica-Based

Polymer-Coated Silica-Based

Core-Shell Silica-Based

Polymer-Based

Other

Global Phenyl Reversed-Phase Chromatography Packing Market, Segmentation by

Particle Size:

Sub-2 μ m

2 μ m to 3 μ m

3 μ m to 5 μ m

5 μ m to 10 μ m

Above 10 μ m

Global Phenyl Reversed-Phase Chromatography Packing Market, Segmentation by Pore Size:

Small-Pore $\leq 100 \text{ \AA}$

Standard-Pore 120 $\text{\AA}$ to 160 $\text{\AA}$

Wide-Pore 200 $\text{\AA}$ to 300 $\text{\AA}$

Extra-Wide-Pore Above 300 $\text{\AA}$

Other

Global Phenyl Reversed-Phase Chromatography Packing Market, Segmentation by Application:

Pharmaceutical Small-Molecule Analysis

Peptide and Protein Analysis

Natural Product and Food Testing

Environmental and Industrial Testing

Preparative Purification

Other

Companies Profiled:

Waters

Agilent Technologies

Thermo Fisher Scientific

Phenomenex

Merck

YMC

GL Sciences

Shimadzu

Sepax Technologies

Welch Materials

Restek

Avantor

Nouryon

Imtakt

Osaka Soda

Key Questions Answered:

1. How big is the global Phenyl Reversed-Phase Chromatography Packing market?

2. What is the demand of the global Phenyl Reversed-Phase Chromatography Packing market?
3. What is the year over year growth of the global Phenyl Reversed-Phase Chromatography Packing market?
4. What is the production and production value of the global Phenyl Reversed-Phase Chromatography Packing market?
5. Who are the key producers in the global Phenyl Reversed-Phase Chromatography Packing market?
6. What are the growth factors driving the market demand?

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