

Global Reversed-Phase C18 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 Reversed-Phase C18 Chromatography Media market size was valued at US\$ 507 million in 2025 and is forecast to a readjusted size of US\$ 761 million by 2032 with a CAGR of 6.0% during review period.

Reversed-phase C18 chromatography media are hydrophobic stationary phases based on high-purity spherical silica, hybrid silica, core-shell particles, or modified polymer supports. They are functionalized through octadecylsilane (C18) bonding, end-capping, polar-embedded groups, or polymer coatings. These materials are widely packed into HPLC, UHPLC, preparative LC, flash chromatography, and solid-phase extraction (SPE) columns for the separation, analysis, and purification of compounds ranging from low- to medium-polarity molecules, peptides, oligonucleotides, natural products, and pharmaceutical impurities. The estimated gross margin is approximately 54%.

C18 media represent a core stationary phase in liquid chromatography consumables, rather than a general laboratory reagent. Their demand is fundamentally driven by pharmaceutical R&D, bioequivalence studies, impurity profiling, and routine quality control in food and environmental testing. Due to its broad method compatibility and extensive regulatory validation base, C18 remains the default stationary phase in most analytical and preparative workflows, making it one of the highest-frequency consumables in chromatography laboratories.

Competitive focus is shifting from simply 'having a C18 phase' toward deeper material performance parameters, including silica purity, batch-to-batch consistency, low metal content, resistance to high aqueous conditions, and stability across a wide pH range.

International suppliers maintain advantages in validated methods, regulatory acceptance, and method transfer support, while domestic manufacturers compete through cost-efficient preparative-grade materials, monodisperse silica particles, and localized technical support for pharmaceutical customers.

Future growth is expected to come from preparative chromatography scale-up, high-throughput quality control, complex impurity analysis, and emerging modalities such as peptides and oligonucleotides. Unlike affinity chromatography media, this segment is not driven by a single biologics breakthrough, but rather by continuous methodological evolution. As a result, it remains a stable, high-repurchase, segmented consumables market with meaningful potential for localization and import substitution.

This report is a detailed and comprehensive analysis for global Reversed-Phase C18 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 Reversed-Phase C18 Chromatography Media market size and forecasts, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global Reversed-Phase C18 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 Reversed-Phase C18 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 Reversed-Phase C18 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 Reversed-Phase C18 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 Reversed-Phase C18 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 Waters, Agilent, Merck, Thermo Fisher Scientific, Phenomenex, YMC, Osaka Soda, GL Sciences, Tosoh Bioscience, FUJIFILM Wako, etc.

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

Market Segmentation

Reversed-Phase C18 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

Silica-Based C18 Media

Hybrid Silica C18 Media

Polymer-Coated Silica C18 Media

Core-Shell C18 Media

Polymeric C18 Media

Other C18 Media

Market segment by Particle Size Range

Sub-2 µm C18 Media

2-3 µm C18 Media

3-5 µm C18 Media

5-10 µm C18 Media

10-30 µm C18 Media

Above 30 µm C18 Media

Market segment by Pore Size Range

60-90 Å C18 Media

100-120 Å C18 Media

150-200 Å C18 Media

300 Å C18 Media

Above 300 Å C18 Media

Market segment by Surface Modification

Non-Endcapped C18 Media

Endcapped C18 Media

Polar-Endcapped C18 Media

Polar-Embedded C18 Media

Sterically Protected C18 Media

Mixed-Mode C18 Media

Market segment by Application

Pharmaceutical Quality Control

Preparative Purification

Natural Product Separation

Peptide and Oligonucleotide Analysis

Food and Environmental Testing

Bioanalytical and Clinical Research

Major players covered

Waters

Agilent

Merck

Thermo Fisher Scientific

Phenomenex

YMC

Osaka Soda

GL Sciences

Tosoh Bioscience

FUJIFILM Wako

Welch Materials

NanoMicro

NanoChrom

ACChrom

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 Reversed-Phase C18 Chromatography Media product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Reversed-Phase C18 Chromatography Media, with price, sales quantity, revenue, and global market share of Reversed-Phase C18 Chromatography Media from 2021 to 2026.

Chapter 3, the Reversed-Phase C18 Chromatography Media competitive situation, sales quantity, revenue, and global market share of top manufacturers

are analyzed emphatically by landscape contrast.

Chapter 4, the Reversed-Phase C18 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 Reversed-Phase C18 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 Reversed-Phase C18 Chromatography Media.

Chapter 14 and 15, to describe Reversed-Phase C18 Chromatography Media sales channel, distributors, customers, research findings and conclusion.

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