

Global Reversed-Phase C18 Chromatography Media Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Reversed-Phase C18 Chromatography Media market size is expected to reach \$ 761 million by 2032, rising at a market growth of 6.0% CAGR during the forecast period (2026-2032).

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 studies the global Reversed-Phase C18 Chromatography Media production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Reversed-Phase C18 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 Reversed-Phase C18 Chromatography Media that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Reversed-Phase C18 Chromatography Media total production and demand, 2021-2032, (kg)

Global Reversed-Phase C18 Chromatography Media total production value, 2021-2032, (USD Million)

Global Reversed-Phase C18 Chromatography Media production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (kg), (based on production site)

Global Reversed-Phase C18 Chromatography Media consumption by region & country, CAGR, 2021-2032 & (kg)

U.S. VS China: Reversed-Phase C18 Chromatography Media domestic production, consumption, key domestic manufacturers and share

Global Reversed-Phase C18 Chromatography Media production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (kg)

Global Reversed-Phase C18 Chromatography Media production by Type, production, value, CAGR, 2021-2032, (USD Million) & (kg)

Global Reversed-Phase C18 Chromatography Media production by Application, production, value, CAGR, 2021-2032, (USD Million) & (kg)

This report profiles key players in the global Reversed-Phase C18 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Reversed-Phase C18 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 Reversed-Phase C18 Chromatography Media Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Reversed-Phase C18 Chromatography Media Market, Segmentation 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

Global Reversed-Phase C18 Chromatography Media Market, Segmentation by Particle Size Range:

Sub-2 μ m C18 Media

2-3 μ m C18 Media

3-5 μ m C18 Media

5-10 μ m C18 Media

10-30 μ m C18 Media

Above 30 μ m C18 Media

Global Reversed-Phase C18 Chromatography Media Market, Segmentation by Pore Size Range:

60-90 $\text{\AA}$ C18 Media

100-120 $\text{\AA}$ C18 Media

150-200 $\text{\AA}$ C18 Media

300 ? C18 Media

Above 300 ? C18 Media

Global Reversed-Phase C18 Chromatography Media Market, Segmentation 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

Global Reversed-Phase C18 Chromatography Media Market, Segmentation by Application:

Pharmaceutical Quality Control

Preparative Purification

Natural Product Separation

Peptide and Oligonucleotide Analysis

Food and Environmental Testing

Bioanalytical and Clinical Research

Companies Profiled:

Waters

Agilent

Merck

Thermo Fisher Scientific

Phenomenex

YMC

Osaka Soda

GL Sciences

Tosoh Bioscience

FUJIFILM Wako

Welch Materials

NanoMicro

NanoChrom

ACChrom

Key Questions Answered:

1. How big is the global Reversed-Phase C18 Chromatography Media market?
2. What is the demand of the global Reversed-Phase C18 Chromatography Media market?
3. What is the year over year growth of the global Reversed-Phase C18 Chromatography Media market?
4. What is the production and production value of the global Reversed-Phase C18 Chromatography Media market?
5. Who are the key producers in the global Reversed-Phase C18 Chromatography Media market?

6. What are the growth factors driving the market demand?

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