

# Global Silica-Based HPLC Columns Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G65B48BD4824EN.html>

Date: April 2026

Pages: 127

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

ID: G65B48BD4824EN

## Abstracts

The global Silica-Based HPLC Columns market size is expected to reach \$ 1831 million by 2032, rising at a market growth of 5.7% CAGR during the forecast period (2026-2032).

Silica-Based HPLC Columns are high-performance liquid chromatography columns in which porous silica particles serve as the stationary-phase substrate and are packed into a high-pressure column tube (commonly stainless steel or PEEK). The silica surface is often chemically bonded with tailored ligands—such as C18/C8 alkyl chains, phenyl, cyano, amino, diol, or ion-exchange functionalities—so the column can operate in reversed-phase, normal-phase, HILIC, or ion-exchange modes. The product exists to solve a central analytical problem: separating and quantifying closely related components in complex mixtures (e.g., isomers, impurities, degradants, metabolites) with high resolution, reproducibility, and robustness, enabling routine QC in pharmaceuticals (related substances and impurity profiling), bioanalysis, food and environmental testing, and process monitoring in fine chemicals. Silica became the dominant base material because its high surface area, controllable pore structure, and well-understood silanol surface chemistry allow selectivity to be “engineered” through surface modification while maintaining excellent efficiency. Historically, liquid chromatography evolved from early low-pressure packed beds with irregular particles to modern HPLC in the 1960s–1970s, when uniform porous silica microspheres and bonded-phase chemistry—especially C18 reversed-phase—dramatically improved efficiency and reproducibility; subsequent innovations addressed peak tailing and stability through endcapping, higher-purity silica, optimized pore sizes for larger biomolecules, and hybrid or modified silica surfaces to extend pH tolerance and durability. Upstream materials and component supply typically spans: high-purity silicon/silicate feedstocks and precursors for synthesizing porous silica microspheres;

porogens/templates and surface-chemistry reagents (silanization agents, chlorosilanes/alkoxysilanes for bonding, and endcapping reagents); ultra-high-purity solvents and reagent-grade water for washing, bonding, and cleaning; column hardware materials (316L stainless tubing or PEEK tubing); porous frits/sintered filters that retain the packed bed; end fittings, ferrules, and connectors; high-pressure seals and gaskets (PTFE/PEEK/elastomers); plus labeling and protective packaging?supported by chemical raw-material suppliers, specialty reagent providers, metals and polymer material vendors, porous-material/frit manufacturers (often powder metallurgy or micro-porous polymer specialists), precision machining houses, and laboratory-grade packaging suppliers. In 2025, the global production capacity of silica-based HPLC columns reached 1.2 million units, with total sales volume of 936,000 units. The average selling price was USD 1,285 per unit, and corporate gross margins ranged between 45% and 55%.

The market today is shaped by a mix of mature demand, continuous method upgrades, and a growing preference for supply certainty and compliance readiness. In regulated laboratories, column selection is increasingly tied to long-term availability, column-to-column reproducibility, and strong technical support that helps with method transfer, troubleshooting, and audit documentation, rather than price alone. At the same time, sample matrices are becoming more complex, which is pushing the market from broadly ?general-purpose? offerings toward more application-tuned variants that address recurring pain points such as peak tailing, insufficient retention of polar compounds, and difficult separations of closely related impurities. On the procurement side, many buyers now evaluate vendors through a broader lens?quality systems, traceability, delivery reliability, and risk controls?especially as cross-border supply chains face tighter scrutiny and the cost of disruption is higher.

Looking ahead, momentum will concentrate around higher-throughput automation, more deliberate selectivity engineering for challenging samples, and sustainability plus compliance-friendly adoption. As workflows move toward automated sampling, online/at-line preparation, and software-managed method lifecycles, columns are expected to hold stable performance under unattended operation, with less drift from aging and better tolerance to fouling and aggressive cleaning. The growing complexity of analytes?new chemical entities, impurity profiles, degradation pathways, stereoisomers, and biomolecule-related fragments?will drive more segmented stationary-phase chemistries and ?problem-led? product portfolios, emphasizing predictable interactions, reduced uncontrolled secondary effects (e.g., tailing and memory), and improved transferability across different mobile-phase systems and instrument platforms. In parallel, laboratories and organizations will increasingly factor in solvent footprint, waste

handling, and safety, encouraging greener mobile phases and lower-consumption practices aligned with compatible consumables, while regulators and auditors place more weight on change control, equivalency arguments, and documentation completeness.

The forces accelerating these shifts include stricter regulatory expectations, more frequent cross-site method transfers, and the normalization of data integrity and traceability requirements, alongside richer R&D pipelines that create tougher analytical tasks and staffing constraints that incentivize automation and reduced rework. The barriers are equally real: chromatographic selectivity is often context-dependent, so ?better? performance can be tightly coupled to a specific method, and switching columns can trigger costly revalidation and risk assessments. Small variations upstream?raw-material purity, subtle surface-chemistry differences, and packing-process windows?can translate into meaningful performance variability, making batch consistency hard to perfect. Added to this are longer qualification cycles for new suppliers or materials due to compliance audits and geopolitical considerations, which encourages conservative purchasing behavior. The market therefore continues to balance performance, availability, documentation strength, and total cost of ownership, rewarding suppliers that can pair platform-like product families with application-level solutions and robust support.

This report studies the global Silica-Based HPLC Columns production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Silica-Based HPLC Columns 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 Silica-Based HPLC Columns that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Silica-Based HPLC Columns total production and demand, 2021-2032, (Units)

Global Silica-Based HPLC Columns total production value, 2021-2032, (USD Million)

Global Silica-Based HPLC Columns production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Silica-Based HPLC Columns consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Silica-Based HPLC Columns domestic production, consumption, key domestic manufacturers and share

Global Silica-Based HPLC Columns production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Silica-Based HPLC Columns production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Silica-Based HPLC Columns production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Silica-Based HPLC Columns 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 Tosoh Bioscience, Shimadzu Corporation, Agilent, Waters Corporation, Danaher, Hamilton, Merck, Bio-Rad, Dikma Technologies, Idex, 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 Silica-Based HPLC Columns 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 Silica-Based HPLC Columns Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Silica-Based HPLC Columns Market, Segmentation by Type:

Reversed Phase

Normal Phase

Ion Exchange

#### Global Silica-Based HPLC Columns Market, Segmentation by Particle Size:

Sub-2  $\mu$ m Particles

3  $\mu$ m Particles

5  $\mu$ m Particles

10  $\mu$ m Particles

Others

#### Global Silica-Based HPLC Columns Market, Segmentation by Pore Size:

60  $\mu$  Pore Size

80  $\mu$  Pore Size

100  $\mu$  Pore Size

300  $\mu$  Pore Size

Wide-Pore Above 300 ?

Global Silica-Based HPLC Columns Market, Segmentation by Application:

Environment

Food

Chemistry

Biology

Medical

Companies Profiled:

Tosoh Bioscience

Shimadzu Corporation

Agilent

Waters Corporation

Danaher

Hamilton

Merck

Bio-Rad

Dikma Technologies

Idex

VDS optilab

JASCO Corporation

YMC

NanoMicro Tech

**Key Questions Answered:**

1. How big is the global Silica-Based HPLC Columns market?
2. What is the demand of the global Silica-Based HPLC Columns market?
3. What is the year over year growth of the global Silica-Based HPLC Columns market?
4. What is the production and production value of the global Silica-Based HPLC Columns market?
5. Who are the key producers in the global Silica-Based HPLC Columns market?
6. What are the growth factors driving the market demand?

## Contents

### 1 SUPPLY SUMMARY

- 1.1 Silica-Based HPLC Columns Introduction
- 1.2 World Silica-Based HPLC Columns Supply & Forecast
  - 1.2.1 World Silica-Based HPLC Columns Production Value (2021 & 2025 & 2032)
  - 1.2.2 World Silica-Based HPLC Columns Production (2021-2032)
  - 1.2.3 World Silica-Based HPLC Columns Pricing Trends (2021-2032)
- 1.3 World Silica-Based HPLC Columns Production by Region (Based on Production Site)
  - 1.3.1 World Silica-Based HPLC Columns Production Value by Region (2021-2032)
  - 1.3.2 World Silica-Based HPLC Columns Production by Region (2021-2032)
  - 1.3.3 World Silica-Based HPLC Columns Average Price by Region (2021-2032)
  - 1.3.4 North America Silica-Based HPLC Columns Production (2021-2032)
  - 1.3.5 Europe Silica-Based HPLC Columns Production (2021-2032)
  - 1.3.6 China Silica-Based HPLC Columns Production (2021-2032)
  - 1.3.7 Japan Silica-Based HPLC Columns Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
  - 1.4.1 Silica-Based HPLC Columns Market Drivers
  - 1.4.2 Factors Affecting Demand
  - 1.4.3 Silica-Based HPLC Columns Major Market Trends

### 2 DEMAND SUMMARY

- 2.1 World Silica-Based HPLC Columns Demand (2021-2032)
- 2.2 World Silica-Based HPLC Columns Consumption by Region
  - 2.2.1 World Silica-Based HPLC Columns Consumption by Region (2021-2026)
  - 2.2.2 World Silica-Based HPLC Columns Consumption Forecast by Region (2027-2032)
- 2.3 United States Silica-Based HPLC Columns Consumption (2021-2032)
- 2.4 China Silica-Based HPLC Columns Consumption (2021-2032)
- 2.5 Europe Silica-Based HPLC Columns Consumption (2021-2032)
- 2.6 Japan Silica-Based HPLC Columns Consumption (2021-2032)
- 2.7 South Korea Silica-Based HPLC Columns Consumption (2021-2032)
- 2.8 ASEAN Silica-Based HPLC Columns Consumption (2021-2032)
- 2.9 India Silica-Based HPLC Columns Consumption (2021-2032)

### 3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Silica-Based HPLC Columns Production Value by Manufacturer (2021-2026)
- 3.2 World Silica-Based HPLC Columns Production by Manufacturer (2021-2026)
- 3.3 World Silica-Based HPLC Columns Average Price by Manufacturer (2021-2026)
- 3.4 Silica-Based HPLC Columns Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
  - 3.5.1 Global Silica-Based HPLC Columns Industry Rank of Major Manufacturers
  - 3.5.2 Global Concentration Ratios (CR4) for Silica-Based HPLC Columns in 2025
  - 3.5.3 Global Concentration Ratios (CR8) for Silica-Based HPLC Columns in 2025
- 3.6 Silica-Based HPLC Columns Market: Overall Company Footprint Analysis
  - 3.6.1 Silica-Based HPLC Columns Market: Region Footprint
  - 3.6.2 Silica-Based HPLC Columns Market: Company Product Type Footprint
  - 3.6.3 Silica-Based HPLC Columns Market: Company Product Application Footprint
- 3.7 Competitive Environment
  - 3.7.1 Historical Structure of the Industry
  - 3.7.2 Barriers of Market Entry
  - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

## **4 UNITED STATES VS CHINA VS REST OF THE WORLD**

- 4.1 United States VS China: Silica-Based HPLC Columns Production Value Comparison
  - 4.1.1 United States VS China: Silica-Based HPLC Columns Production Value Comparison (2021 & 2025 & 2032)
  - 4.1.2 United States VS China: Silica-Based HPLC Columns Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Silica-Based HPLC Columns Production Comparison
  - 4.2.1 United States VS China: Silica-Based HPLC Columns Production Comparison (2021 & 2025 & 2032)
  - 4.2.2 United States VS China: Silica-Based HPLC Columns Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Silica-Based HPLC Columns Consumption Comparison
  - 4.3.1 United States VS China: Silica-Based HPLC Columns Consumption Comparison (2021 & 2025 & 2032)
  - 4.3.2 United States VS China: Silica-Based HPLC Columns Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Silica-Based HPLC Columns Manufacturers and Market Share,

## 2021-2026

4.4.1 United States Based Silica-Based HPLC Columns Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Silica-Based HPLC Columns Production Value (2021-2026)

4.4.3 United States Based Manufacturers Silica-Based HPLC Columns Production (2021-2026)

4.5 China Based Silica-Based HPLC Columns Manufacturers and Market Share

4.5.1 China Based Silica-Based HPLC Columns Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Silica-Based HPLC Columns Production Value (2021-2026)

4.5.3 China Based Manufacturers Silica-Based HPLC Columns Production (2021-2026)

4.6 Rest of World Based Silica-Based HPLC Columns Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Silica-Based HPLC Columns Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Silica-Based HPLC Columns Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Silica-Based HPLC Columns Production (2021-2026)

## 5 MARKET ANALYSIS BY TYPE

5.1 World Silica-Based HPLC Columns Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Reversed Phase

5.2.2 Normal Phase

5.2.3 Ion Exchange

5.3 Market Segment by Type

5.3.1 World Silica-Based HPLC Columns Production by Type (2021-2032)

5.3.2 World Silica-Based HPLC Columns Production Value by Type (2021-2032)

5.3.3 World Silica-Based HPLC Columns Average Price by Type (2021-2032)

## 6 MARKET ANALYSIS BY PARTICLE SIZE

6.1 World Silica-Based HPLC Columns Market Size Overview by Particle Size: 2021 VS

2025 VS 2032

6.2 Segment Introduction by Particle Size

6.2.1 Sub-2  $\mu$ m Particles

6.2.2 3  $\mu$ m Particles

6.2.3 5  $\mu$ m Particles

6.2.4 10  $\mu$ m Particles

6.2.5 Others

6.3 Market Segment by Particle Size

6.3.1 World Silica-Based HPLC Columns Production by Particle Size (2021-2032)

6.3.2 World Silica-Based HPLC Columns Production Value by Particle Size (2021-2032)

6.3.3 World Silica-Based HPLC Columns Average Price by Particle Size (2021-2032)

## **7 MARKET ANALYSIS BY PORE SIZE**

7.1 World Silica-Based HPLC Columns Market Size Overview by Pore Size: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Pore Size

7.2.1 60  $\mu$  Pore Size

7.2.2 80  $\mu$  Pore Size

7.2.3 100  $\mu$  Pore Size

7.2.4 300  $\mu$  Pore Size

7.2.5 Wide-Pore Above 300  $\mu$

7.3 Market Segment by Pore Size

7.3.1 World Silica-Based HPLC Columns Production by Pore Size (2021-2032)

7.3.2 World Silica-Based HPLC Columns Production Value by Pore Size (2021-2032)

7.3.3 World Silica-Based HPLC Columns Average Price by Pore Size (2021-2032)

## **8 MARKET ANALYSIS BY APPLICATION**

8.1 World Silica-Based HPLC Columns Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Environment

8.2.2 Food

8.2.3 Chemistry

8.2.4 Biology

8.2.5 Medical

8.3 Market Segment by Application

- 8.3.1 World Silica-Based HPLC Columns Production by Application (2021-2032)
- 8.3.2 World Silica-Based HPLC Columns Production Value by Application (2021-2032)
- 8.3.3 World Silica-Based HPLC Columns Average Price by Application (2021-2032)

## **9 COMPANY PROFILES**

### 9.1 Tosoh Bioscience

- 9.1.1 Tosoh Bioscience Details
- 9.1.2 Tosoh Bioscience Major Business
- 9.1.3 Tosoh Bioscience Silica-Based HPLC Columns Product and Services
- 9.1.4 Tosoh Bioscience Silica-Based HPLC Columns Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.1.5 Tosoh Bioscience Recent Developments/Updates
- 9.1.6 Tosoh Bioscience Competitive Strengths & Weaknesses

### 9.2 Shimadzu Corporation

- 9.2.1 Shimadzu Corporation Details
- 9.2.2 Shimadzu Corporation Major Business
- 9.2.3 Shimadzu Corporation Silica-Based HPLC Columns Product and Services
- 9.2.4 Shimadzu Corporation Silica-Based HPLC Columns Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.2.5 Shimadzu Corporation Recent Developments/Updates
- 9.2.6 Shimadzu Corporation Competitive Strengths & Weaknesses

### 9.3 Agilent

- 9.3.1 Agilent Details
- 9.3.2 Agilent Major Business
- 9.3.3 Agilent Silica-Based HPLC Columns Product and Services
- 9.3.4 Agilent Silica-Based HPLC Columns Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.3.5 Agilent Recent Developments/Updates
- 9.3.6 Agilent Competitive Strengths & Weaknesses

### 9.4 Waters Corporation

- 9.4.1 Waters Corporation Details
- 9.4.2 Waters Corporation Major Business
- 9.4.3 Waters Corporation Silica-Based HPLC Columns Product and Services
- 9.4.4 Waters Corporation Silica-Based HPLC Columns Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.4.5 Waters Corporation Recent Developments/Updates
- 9.4.6 Waters Corporation Competitive Strengths & Weaknesses

### 9.5 Danaher

- 9.5.1 Danaher Details
- 9.5.2 Danaher Major Business
- 9.5.3 Danaher Silica-Based HPLC Columns Product and Services
- 9.5.4 Danaher Silica-Based HPLC Columns Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.5.5 Danaher Recent Developments/Updates
- 9.5.6 Danaher Competitive Strengths & Weaknesses
- 9.6 Hamilton
  - 9.6.1 Hamilton Details
  - 9.6.2 Hamilton Major Business
  - 9.6.3 Hamilton Silica-Based HPLC Columns Product and Services
  - 9.6.4 Hamilton Silica-Based HPLC Columns Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.6.5 Hamilton Recent Developments/Updates
  - 9.6.6 Hamilton Competitive Strengths & Weaknesses
- 9.7 Merck
  - 9.7.1 Merck Details
  - 9.7.2 Merck Major Business
  - 9.7.3 Merck Silica-Based HPLC Columns Product and Services
  - 9.7.4 Merck Silica-Based HPLC Columns Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.7.5 Merck Recent Developments/Updates
  - 9.7.6 Merck Competitive Strengths & Weaknesses
- 9.8 Bio-Rad
  - 9.8.1 Bio-Rad Details
  - 9.8.2 Bio-Rad Major Business
  - 9.8.3 Bio-Rad Silica-Based HPLC Columns Product and Services
  - 9.8.4 Bio-Rad Silica-Based HPLC Columns Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.8.5 Bio-Rad Recent Developments/Updates
  - 9.8.6 Bio-Rad Competitive Strengths & Weaknesses
- 9.9 Dikma Technologies
  - 9.9.1 Dikma Technologies Details
  - 9.9.2 Dikma Technologies Major Business
  - 9.9.3 Dikma Technologies Silica-Based HPLC Columns Product and Services
  - 9.9.4 Dikma Technologies Silica-Based HPLC Columns Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.9.5 Dikma Technologies Recent Developments/Updates
  - 9.9.6 Dikma Technologies Competitive Strengths & Weaknesses

## 9.10 Idex

### 9.10.1 Idex Details

### 9.10.2 Idex Major Business

### 9.10.3 Idex Silica-Based HPLC Columns Product and Services

### 9.10.4 Idex Silica-Based HPLC Columns Production, Price, Value, Gross Margin and Market Share (2021-2026)

### 9.10.5 Idex Recent Developments/Updates

### 9.10.6 Idex Competitive Strengths & Weaknesses

## 9.11 VDS optilab

### 9.11.1 VDS optilab Details

### 9.11.2 VDS optilab Major Business

### 9.11.3 VDS optilab Silica-Based HPLC Columns Product and Services

### 9.11.4 VDS optilab Silica-Based HPLC Columns Production, Price, Value, Gross Margin and Market Share (2021-2026)

### 9.11.5 VDS optilab Recent Developments/Updates

### 9.11.6 VDS optilab Competitive Strengths & Weaknesses

## 9.12 JASCO Corporation

### 9.12.1 JASCO Corporation Details

### 9.12.2 JASCO Corporation Major Business

### 9.12.3 JASCO Corporation Silica-Based HPLC Columns Product and Services

### 9.12.4 JASCO Corporation Silica-Based HPLC Columns Production, Price, Value, Gross Margin and Market Share (2021-2026)

### 9.12.5 JASCO Corporation Recent Developments/Updates

### 9.12.6 JASCO Corporation Competitive Strengths & Weaknesses

## 9.13 YMC

### 9.13.1 YMC Details

### 9.13.2 YMC Major Business

### 9.13.3 YMC Silica-Based HPLC Columns Product and Services

### 9.13.4 YMC Silica-Based HPLC Columns Production, Price, Value, Gross Margin and Market Share (2021-2026)

### 9.13.5 YMC Recent Developments/Updates

### 9.13.6 YMC Competitive Strengths & Weaknesses

## 9.14 NanoMicro Tech

### 9.14.1 NanoMicro Tech Details

### 9.14.2 NanoMicro Tech Major Business

### 9.14.3 NanoMicro Tech Silica-Based HPLC Columns Product and Services

### 9.14.4 NanoMicro Tech Silica-Based HPLC Columns Production, Price, Value, Gross Margin and Market Share (2021-2026)

### 9.14.5 NanoMicro Tech Recent Developments/Updates

#### 9.14.6 NanoMicro Tech Competitive Strengths & Weaknesses

### **10 INDUSTRY CHAIN ANALYSIS**

#### 10.1 Silica-Based HPLC Columns Industry Chain

#### 10.2 Silica-Based HPLC Columns Upstream Analysis

##### 10.2.1 Silica-Based HPLC Columns Core Raw Materials

##### 10.2.2 Main Manufacturers of Silica-Based HPLC Columns Core Raw Materials

#### 10.3 Midstream Analysis

#### 10.4 Downstream Analysis

#### 10.5 Silica-Based HPLC Columns Production Mode

#### 10.6 Silica-Based HPLC Columns Procurement Model

#### 10.7 Silica-Based HPLC Columns Industry Sales Model and Sales Channels

##### 10.7.1 Silica-Based HPLC Columns Sales Model

##### 10.7.2 Silica-Based HPLC Columns Typical Distributors

### **11 RESEARCH FINDINGS AND CONCLUSION**

### **12 APPENDIX**

#### 12.1 Methodology

#### 12.2 Research Process and Data Source

#### 12.3 Disclaimer

## List Of Tables

### LIST OF TABLES

Table 1. World Silica-Based HPLC Columns Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Silica-Based HPLC Columns Production Value by Region (2021-2026) & (USD Million)

Table 3. World Silica-Based HPLC Columns Production Value by Region (2027-2032) & (USD Million)

Table 4. World Silica-Based HPLC Columns Production Value Market Share by Region (2021-2026)

Table 5. World Silica-Based HPLC Columns Production Value Market Share by Region (2027-2032)

Table 6. World Silica-Based HPLC Columns Production by Region (2021-2026) & (Units)

Table 7. World Silica-Based HPLC Columns Production by Region (2027-2032) & (Units)

Table 8. World Silica-Based HPLC Columns Production Market Share by Region (2021-2026)

Table 9. World Silica-Based HPLC Columns Production Market Share by Region (2027-2032)

Table 10. World Silica-Based HPLC Columns Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World Silica-Based HPLC Columns Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. Silica-Based HPLC Columns Major Market Trends

Table 13. World Silica-Based HPLC Columns Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)

Table 14. World Silica-Based HPLC Columns Consumption by Region (2021-2026) & (Units)

Table 15. World Silica-Based HPLC Columns Consumption Forecast by Region (2027-2032) & (Units)

Table 16. World Silica-Based HPLC Columns Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Silica-Based HPLC Columns Producers in 2025

Table 18. World Silica-Based HPLC Columns Production by Manufacturer (2021-2026) & (Units)

Table 19. Production Market Share of Key Silica-Based HPLC Columns Producers in 2025

Table 20. World Silica-Based HPLC Columns Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global Silica-Based HPLC Columns Company Evaluation Quadrant

Table 22. World Silica-Based HPLC Columns Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Silica-Based HPLC Columns Production Site of Key Manufacturer

Table 24. Silica-Based HPLC Columns Market: Company Product Type Footprint

Table 25. Silica-Based HPLC Columns Market: Company Product Application Footprint

Table 26. Silica-Based HPLC Columns Competitive Factors

Table 27. Silica-Based HPLC Columns New Entrant and Capacity Expansion Plans

Table 28. Silica-Based HPLC Columns Mergers & Acquisitions Activity

Table 29. United States VS China Silica-Based HPLC Columns Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Silica-Based HPLC Columns Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China Silica-Based HPLC Columns Consumption Comparison, (2021 & 2025 & 2032) & (Units)

Table 32. United States Based Silica-Based HPLC Columns Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Silica-Based HPLC Columns Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Silica-Based HPLC Columns Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Silica-Based HPLC Columns Production (2021-2026) & (Units)

Table 36. United States Based Manufacturers Silica-Based HPLC Columns Production Market Share (2021-2026)

Table 37. China Based Silica-Based HPLC Columns Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Silica-Based HPLC Columns Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Silica-Based HPLC Columns Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Silica-Based HPLC Columns Production, (2021-2026) & (Units)

Table 41. China Based Manufacturers Silica-Based HPLC Columns Production Market

Share (2021-2026)

Table 42. Rest of World Based Silica-Based HPLC Columns Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Silica-Based HPLC Columns Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Silica-Based HPLC Columns Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Silica-Based HPLC Columns Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers Silica-Based HPLC Columns Production Market Share (2021-2026)

Table 47. World Silica-Based HPLC Columns Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Silica-Based HPLC Columns Production by Type (2021-2026) & (Units)

Table 49. World Silica-Based HPLC Columns Production by Type (2027-2032) & (Units)

Table 50. World Silica-Based HPLC Columns Production Value by Type (2021-2026) & (USD Million)

Table 51. World Silica-Based HPLC Columns Production Value by Type (2027-2032) & (USD Million)

Table 52. World Silica-Based HPLC Columns Average Price by Type (2021-2026) & (US\$/Unit)

Table 53. World Silica-Based HPLC Columns Average Price by Type (2027-2032) & (US\$/Unit)

Table 54. World Silica-Based HPLC Columns Production Value by Particle Size, (USD Million), 2021 & 2025 & 2032

Table 55. World Silica-Based HPLC Columns Production by Particle Size (2021-2026) & (Units)

Table 56. World Silica-Based HPLC Columns Production by Particle Size (2027-2032) & (Units)

Table 57. World Silica-Based HPLC Columns Production Value by Particle Size (2021-2026) & (USD Million)

Table 58. World Silica-Based HPLC Columns Production Value by Particle Size (2027-2032) & (USD Million)

Table 59. World Silica-Based HPLC Columns Average Price by Particle Size (2021-2026) & (US\$/Unit)

Table 60. World Silica-Based HPLC Columns Average Price by Particle Size (2027-2032) & (US\$/Unit)

Table 61. World Silica-Based HPLC Columns Production Value by Pore Size, (USD Million), 2021 & 2025 & 2032

Table 62. World Silica-Based HPLC Columns Production by Pore Size (2021-2026) & (Units)

Table 63. World Silica-Based HPLC Columns Production by Pore Size (2027-2032) & (Units)

Table 64. World Silica-Based HPLC Columns Production Value by Pore Size (2021-2026) & (USD Million)

Table 65. World Silica-Based HPLC Columns Production Value by Pore Size (2027-2032) & (USD Million)

Table 66. World Silica-Based HPLC Columns Average Price by Pore Size (2021-2026) & (US\$/Unit)

Table 67. World Silica-Based HPLC Columns Average Price by Pore Size (2027-2032) & (US\$/Unit)

Table 68. World Silica-Based HPLC Columns Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Silica-Based HPLC Columns Production by Application (2021-2026) & (Units)

Table 70. World Silica-Based HPLC Columns Production by Application (2027-2032) & (Units)

Table 71. World Silica-Based HPLC Columns Production Value by Application (2021-2026) & (USD Million)

Table 72. World Silica-Based HPLC Columns Production Value by Application (2027-2032) & (USD Million)

Table 73. World Silica-Based HPLC Columns Average Price by Application (2021-2026) & (US\$/Unit)

Table 74. World Silica-Based HPLC Columns Average Price by Application (2027-2032) & (US\$/Unit)

Table 75. Tosoh Bioscience Basic Information, Manufacturing Base and Competitors

Table 76. Tosoh Bioscience Major Business

Table 77. Tosoh Bioscience Silica-Based HPLC Columns Product and Services

Table 78. Tosoh Bioscience Silica-Based HPLC Columns Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Tosoh Bioscience Recent Developments/Updates

Table 80. Tosoh Bioscience Competitive Strengths & Weaknesses

Table 81. Shimadzu Corporation Basic Information, Manufacturing Base and Competitors

Table 82. Shimadzu Corporation Major Business

Table 83. Shimadzu Corporation Silica-Based HPLC Columns Product and Services

Table 84. Shimadzu Corporation Silica-Based HPLC Columns Production (Units), Price

(US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Shimadzu Corporation Recent Developments/Updates

Table 86. Shimadzu Corporation Competitive Strengths & Weaknesses

Table 87. Agilent Basic Information, Manufacturing Base and Competitors

Table 88. Agilent Major Business

Table 89. Agilent Silica-Based HPLC Columns Product and Services

Table 90. Agilent Silica-Based HPLC Columns Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Agilent Recent Developments/Updates

Table 92. Agilent Competitive Strengths & Weaknesses

Table 93. Waters Corporation Basic Information, Manufacturing Base and Competitors

Table 94. Waters Corporation Major Business

Table 95. Waters Corporation Silica-Based HPLC Columns Product and Services

Table 96. Waters Corporation Silica-Based HPLC Columns Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Waters Corporation Recent Developments/Updates

Table 98. Waters Corporation Competitive Strengths & Weaknesses

Table 99. Danaher Basic Information, Manufacturing Base and Competitors

Table 100. Danaher Major Business

Table 101. Danaher Silica-Based HPLC Columns Product and Services

Table 102. Danaher Silica-Based HPLC Columns Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Danaher Recent Developments/Updates

Table 104. Danaher Competitive Strengths & Weaknesses

Table 105. Hamilton Basic Information, Manufacturing Base and Competitors

Table 106. Hamilton Major Business

Table 107. Hamilton Silica-Based HPLC Columns Product and Services

Table 108. Hamilton Silica-Based HPLC Columns Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Hamilton Recent Developments/Updates

Table 110. Hamilton Competitive Strengths & Weaknesses

Table 111. Merck Basic Information, Manufacturing Base and Competitors

Table 112. Merck Major Business

Table 113. Merck Silica-Based HPLC Columns Product and Services

Table 114. Merck Silica-Based HPLC Columns Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. Merck Recent Developments/Updates

- Table 116. Merck Competitive Strengths & Weaknesses
- Table 117. Bio-Rad Basic Information, Manufacturing Base and Competitors
- Table 118. Bio-Rad Major Business
- Table 119. Bio-Rad Silica-Based HPLC Columns Product and Services
- Table 120. Bio-Rad Silica-Based HPLC Columns Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 121. Bio-Rad Recent Developments/Updates
- Table 122. Bio-Rad Competitive Strengths & Weaknesses
- Table 123. Dikma Technologies Basic Information, Manufacturing Base and Competitors
- Table 124. Dikma Technologies Major Business
- Table 125. Dikma Technologies Silica-Based HPLC Columns Product and Services
- Table 126. Dikma Technologies Silica-Based HPLC Columns Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 127. Dikma Technologies Recent Developments/Updates
- Table 128. Dikma Technologies Competitive Strengths & Weaknesses
- Table 129. IDEX Basic Information, Manufacturing Base and Competitors
- Table 130. IDEX Major Business
- Table 131. IDEX Silica-Based HPLC Columns Product and Services
- Table 132. IDEX Silica-Based HPLC Columns Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 133. IDEX Recent Developments/Updates
- Table 134. IDEX Competitive Strengths & Weaknesses
- Table 135. VDS optilab Basic Information, Manufacturing Base and Competitors
- Table 136. VDS optilab Major Business
- Table 137. VDS optilab Silica-Based HPLC Columns Product and Services
- Table 138. VDS optilab Silica-Based HPLC Columns Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 139. VDS optilab Recent Developments/Updates
- Table 140. VDS optilab Competitive Strengths & Weaknesses
- Table 141. JASCO Corporation Basic Information, Manufacturing Base and Competitors
- Table 142. JASCO Corporation Major Business
- Table 143. JASCO Corporation Silica-Based HPLC Columns Product and Services
- Table 144. JASCO Corporation Silica-Based HPLC Columns Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 145. JASCO Corporation Recent Developments/Updates

- Table 146. JASCO Corporation Competitive Strengths & Weaknesses
- Table 147. YMC Basic Information, Manufacturing Base and Competitors
- Table 148. YMC Major Business
- Table 149. YMC Silica-Based HPLC Columns Product and Services
- Table 150. YMC Silica-Based HPLC Columns Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 151. YMC Recent Developments/Updates
- Table 152. YMC Competitive Strengths & Weaknesses
- Table 153. NanoMicro Tech Basic Information, Manufacturing Base and Competitors
- Table 154. NanoMicro Tech Major Business
- Table 155. NanoMicro Tech Silica-Based HPLC Columns Product and Services
- Table 156. NanoMicro Tech Silica-Based HPLC Columns Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 157. NanoMicro Tech Recent Developments/Updates
- Table 158. NanoMicro Tech Competitive Strengths & Weaknesses
- Table 159. Global Key Players of Silica-Based HPLC Columns Upstream (Raw Materials)
- Table 160. Global Silica-Based HPLC Columns Typical Customers
- Table 161. Silica-Based HPLC Columns Typical Distributors

## List Of Figures

### LIST OF FIGURES

Figure 1. Silica-Based HPLC Columns Picture

Figure 2. World Silica-Based HPLC Columns Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Silica-Based HPLC Columns Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Silica-Based HPLC Columns Production (2021-2032) & (Units)

Figure 5. World Silica-Based HPLC Columns Average Price (2021-2032) & (US\$/Unit)

Figure 6. World Silica-Based HPLC Columns Production Value Market Share by Region (2021-2032)

Figure 7. World Silica-Based HPLC Columns Production Market Share by Region (2021-2032)

Figure 8. North America Silica-Based HPLC Columns Production (2021-2032) & (Units)

Figure 9. Europe Silica-Based HPLC Columns Production (2021-2032) & (Units)

Figure 10. China Silica-Based HPLC Columns Production (2021-2032) & (Units)

Figure 11. Japan Silica-Based HPLC Columns Production (2021-2032) & (Units)

Figure 12. Silica-Based HPLC Columns Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Silica-Based HPLC Columns Consumption (2021-2032) & (Units)

Figure 15. World Silica-Based HPLC Columns Consumption Market Share by Region (2021-2032)

Figure 16. United States Silica-Based HPLC Columns Consumption (2021-2032) & (Units)

Figure 17. China Silica-Based HPLC Columns Consumption (2021-2032) & (Units)

Figure 18. Europe Silica-Based HPLC Columns Consumption (2021-2032) & (Units)

Figure 19. Japan Silica-Based HPLC Columns Consumption (2021-2032) & (Units)

Figure 20. South Korea Silica-Based HPLC Columns Consumption (2021-2032) & (Units)

Figure 21. ASEAN Silica-Based HPLC Columns Consumption (2021-2032) & (Units)

Figure 22. India Silica-Based HPLC Columns Consumption (2021-2032) & (Units)

Figure 23. Producer Shipments of Silica-Based HPLC Columns by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Silica-Based HPLC Columns Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Silica-Based HPLC Columns Markets in 2025

Figure 26. United States VS China: Silica-Based HPLC Columns Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Silica-Based HPLC Columns Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Silica-Based HPLC Columns Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Silica-Based HPLC Columns Production Market Share 2025

Figure 30. China Based Manufacturers Silica-Based HPLC Columns Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Silica-Based HPLC Columns Production Market Share 2025

Figure 32. World Silica-Based HPLC Columns Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Silica-Based HPLC Columns Production Value Market Share by Type in 2025

Figure 34. Reversed Phase

Figure 35. Normal Phase

Figure 36. Ion Exchange

Figure 37. World Silica-Based HPLC Columns Production Market Share by Type (2021-2032)

Figure 38. World Silica-Based HPLC Columns Production Value Market Share by Type (2021-2032)

Figure 39. World Silica-Based HPLC Columns Average Price by Type (2021-2032) & (US\$/Unit)

Figure 40. World Silica-Based HPLC Columns Production Value by Particle Size, (USD Million), 2021 & 2025 & 2032

Figure 41. World Silica-Based HPLC Columns Production Value Market Share by Particle Size in 2025

Figure 42. Sub-2  $\mu$ m Particles

Figure 43. 3  $\mu$ m Particles

Figure 44. 5  $\mu$ m Particles

Figure 45. 10  $\mu$ m Particles

Figure 46. Others

Figure 47. World Silica-Based HPLC Columns Production Market Share by Particle Size (2021-2032)

Figure 48. World Silica-Based HPLC Columns Production Value Market Share by Particle Size (2021-2032)

Figure 49. World Silica-Based HPLC Columns Average Price by Particle Size

(2021-2032) & (US\$/Unit)

Figure 50. World Silica-Based HPLC Columns Production Value by Pore Size, (USD Million), 2021 & 2025 & 2032

Figure 51. World Silica-Based HPLC Columns Production Value Market Share by Pore Size in 2025

Figure 52. 60 ? Pore Size

Figure 53. 80 ? Pore Size

Figure 54. 100 ? Pore Size

Figure 55. 300 ? Pore Size

Figure 56. Wide-Pore Above 300 ?

Figure 57. World Silica-Based HPLC Columns Production Market Share by Pore Size (2021-2032)

Figure 58. World Silica-Based HPLC Columns Production Value Market Share by Pore Size (2021-2032)

Figure 59. World Silica-Based HPLC Columns Average Price by Pore Size (2021-2032) & (US\$/Unit)

Figure 60. World Silica-Based HPLC Columns Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 61. World Silica-Based HPLC Columns Production Value Market Share by Application in 2025

Figure 62. Environment

Figure 63. Food

Figure 64. Chemistry

Figure 65. Biology

Figure 66. Medical

Figure 67. World Silica-Based HPLC Columns Production Market Share by Application (2021-2032)

Figure 68. World Silica-Based HPLC Columns Production Value Market Share by Application (2021-2032)

Figure 69. World Silica-Based HPLC Columns Average Price by Application (2021-2032) & (US\$/Unit)

Figure 70. Silica-Based HPLC Columns Industry Chain

Figure 71. Silica-Based HPLC Columns Procurement Model

Figure 72. Silica-Based HPLC Columns Sales Model

Figure 73. Silica-Based HPLC Columns Sales Channels, Direct Sales, and Distribution

Figure 74. Methodology

Figure 75. Research Process and Data Source

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