

Global Strong Anion Exchange Chromatography Resin Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Strong Anion Exchange Chromatography Resin market size is expected to reach \$ 764 million by 2032, rising at a market growth of 8.1% CAGR during the forecast period (2026-2032).

Strong anion-exchange chromatography media are liquid-phase separation materials based on porous microsphere supports such as agarose, methacrylate polymers, polystyrene-divinylbenzene (PS-DVB), silica, or cellulose. These matrices are functionalized with strongly basic, permanently charged ligands such as quaternary ammonium groups, trimethylammonium ethyl groups, or quaternized polyethyleneimine derivatives. Unlike weak ion exchangers, these ligands retain positive charge across a wide pH range, enabling robust electrostatic interactions with negatively charged biomolecules. They are used for capture, polishing, and analytical separation of proteins, antibodies, viral vectors, plasmid DNA, oligonucleotides, and related impurities. The estimated gross margin is approximately 58%.

Strong anion-exchange media are a high-stickiness consumable within downstream bioprocessing and biomolecule analytics. While their market size is smaller than Protein A affinity resins and general reversed-phase chromatography media, they play a critical role in antibody polishing steps, host cell protein and residual DNA removal, and the purification of viral vectors and nucleic acid therapeutics. Purchasing decisions are driven by dynamic binding capacity, salt tolerance, flow rate performance, batch-to-batch consistency, and regulatory documentation rather than unit price alone.

Demand growth is primarily driven by the scale-up of monoclonal antibody production and the increasing use of AAV, plasmid DNA, mRNA, and oligonucleotide-based therapies. In these processes, strong anion-exchange resins are commonly used for

polishing and flow-through impurity removal. Although they may not represent the highest volume step in every workflow, their integration into validated manufacturing processes creates high switching costs and stable repeat demand.

The competitive landscape is led by global suppliers such as Cytiva, Thermo Fisher, Merck, Tosoh, and Bio-Rad at the high-end process level. Domestic manufacturers are accelerating substitution through agarose and polymer-based platforms and scaled manufacturing capabilities. Future opportunities lie not in commoditized Q-type resin expansion, but in high salt-tolerant, high-flow, large-pore, low-leachate, and fully validated process-grade products suitable for regulated biomanufacturing environments.

This report studies the global Strong Anion Exchange Chromatography Resin production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Strong Anion Exchange Chromatography Resin total production and demand, 2021-2032, (kg)

Global Strong Anion Exchange Chromatography Resin total production value, 2021-2032, (USD Million)

Global Strong Anion Exchange Chromatography Resin production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (kg), (based on production site)

Global Strong Anion Exchange Chromatography Resin consumption by region & country, CAGR, 2021-2032 & (kg)

U.S. VS China: Strong Anion Exchange Chromatography Resin domestic production, consumption, key domestic manufacturers and share

Global Strong Anion Exchange Chromatography Resin production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (kg)

Global Strong Anion Exchange Chromatography Resin production by Type, production, value, CAGR, 2021-2032, (USD Million) & (kg)

Global Strong Anion Exchange Chromatography Resin production by Application, production, value, CAGR, 2021-2032, (USD Million) & (kg)

This report profiles key players in the global Strong Anion Exchange Chromatography Resin 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 Cytiva, Thermo Fisher Scientific, Merck, Bio-Rad, Tosoh Bioscience, Purolite, Agilent, Waters, Sepax Bioscience, JNC, 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 Strong Anion Exchange Chromatography Resin 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 Strong Anion Exchange Chromatography Resin Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Strong Anion Exchange Chromatography Resin Market, Segmentation by Type:

Agarose-Based Strong Anion Exchange Resin

Methacrylate-Based Strong Anion Exchange Resin

Polystyrene-DVB-Based Strong Anion Exchange Resin

Silica-Based Strong Anion Exchange Resin

Cellulose-Based Strong Anion Exchange Resin

Other Strong Anion Exchange Resin

Global Strong Anion Exchange Chromatography Resin Market, Segmentation by Ligand Type:

Q-Type Quaternary Amine Ligand

TMAE-Type Ligand

Quaternized Polyethylenimine Ligand

Polymer-Grafted Q Ligand

Other Strong Base Ligand

Global Strong Anion Exchange Chromatography Resin Market, Segmentation by Particle Size Grade:

Fine Particle Grade

Medium Particle Grade

Large Particle Grade

Macro Particle Grade

Mixed or Custom Particle Size

Global Strong Anion Exchange Chromatography Resin Market, Segmentation by Pore Structure:

Nonporous Pore Structure

Standard Protein Pore Structure

Large Pore Structure

Extra-Large Pore Structure

Mixed or Custom Pore Structure

Global Strong Anion Exchange Chromatography Resin Market, Segmentation by Application:

Antibody Purification and Polishing

Recombinant Protein Purification

Viral Vector and Vaccine Purification

Plasmid DNA and Oligonucleotide Purification

Impurity and Host Cell Component Removal

Analytical Characterization

Other

Companies Profiled:

Cytiva

Thermo Fisher Scientific

Merck

Bio-Rad

Tosoh Bioscience

Purolite

Agilent

Waters

Sepax Bioscience

JNC

YMC

Bestchrom

Sunresin Life Sciences

Welch Materials

Key Questions Answered:

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

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