

Global Chiral Stationary Phase?CSP? Market Growth 2026-2032

<https://marketpublishers.com/r/G06CCD6092A2EN.html>

Date: July 2026

Pages: 133

Price: US\$ 3,660.00 (Single User License)

ID: G06CCD6092A2EN

Abstracts

The global Chiral Stationary Phase?CSP? market size is predicted to grow from US\$ 1256 million in 2025 to US\$ 2077 million in 2032; it is expected to grow at a CAGR of 7.5% from 2026 to 2032.

Chiral stationary phases (CSPs) are functional materials used in liquid chromatography systems (including HPLC and UHPLC) and supercritical fluid chromatography (SFC) for enantioselective separation of chiral compounds. They incorporate chiral recognition elements (e.g., polysaccharide derivatives, proteins, cyclodextrins, macrocyclic antibiotics, and chiral ligands) onto or within various supports (silica-based, polymer-based, or hybrid materials). Through non-covalent interactions such as hydrogen bonding, ??? interactions, steric matching, and hydrophobic effects, CSPs enable molecular-level discrimination and differential retention of enantiomers. They serve both analytical-scale method development and preparative-scale purification, with applications spanning pharmaceuticals, agrochemicals, food, and fine chemicals. Their value is driven by enantioselectivity, method transferability, and scalability robustness.

Capacity is highly concentrated in Japan, Europe, and the United States, with polysaccharide-based CSPs accounting for about 75% of total usage and immobilized products exceeding 60% share, corresponding to an annual consumption of about 16,000 liters of packed media (analytical and preparative combined) and a nominal capacity of roughly 22,000 liters. Pricing is strongly tiered, with analytical-grade CSPs averaging USD 80,000?120,000 per liter, preparative-grade at USD 25,000?40,000 per liter, and SMB-equivalent industrial usage at USD 12,000?18,000 per liter, resulting in an overall blended gross margin of approximately 65%. Pharmaceuticals dominate downstream demand at about 68%, followed by agrochemicals at 20% and food/fine chemicals at 12%. The value chain consists of upstream silica/polymer supports and

chiral selectors (primarily polysaccharide derivatives), midstream stationary phase manufacturing, and downstream process integration from analytical method development to preparative and continuous separation (SMB). The global industry exhibits a highly concentrated origin of chiral recognition technologies combined with relatively fragmented application deployment, with Japanese players (led by Daicel) controlling core selector technologies, Western companies maintaining high-end market positions, and Chinese players (e.g., NanoMicro and Sepax) transitioning from base materials toward chiral functionality but still lacking fundamental selector innovation. Overall, the industry is in a technology-driven steady growth phase, with key drivers being the increasing proportion of single-enantiomer drugs and rising purification complexity in advanced therapeutics, while the main uncertainty lies in partial substitution by asymmetric synthesis routes.

LP Information, Inc. (LPI) ' newest research report, the "Chiral Stationary Phase" CSP? Industry Forecast" looks at past sales and reviews total world Chiral Stationary Phase" CSP? sales in 2025, providing a comprehensive analysis by region and market sector of projected Chiral Stationary Phase" CSP? sales for 2026 through 2032. With Chiral Stationary Phase" CSP? sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Chiral Stationary Phase" CSP? industry.

This Insight Report provides a comprehensive analysis of the global Chiral Stationary Phase" CSP? landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Chiral Stationary Phase" CSP? portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Chiral Stationary Phase" CSP? market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Chiral Stationary Phase" CSP? and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Chiral Stationary Phase" CSP?.

This report presents a comprehensive overview, market shares, and growth opportunities of Chiral Stationary Phase" CSP? market by product type, application, key

manufacturers and key regions and countries.

Segmentation by Type:

Polysaccharide-based CSP

Cyclodextrin-based CSP

Protein-based CSP

Macrocyclic Antibiotic CSP

Pirkle-type CSP

Ligand-exchange CSP

Segmentation by Form:

Coated CSP

Immobilized CSP

Segmentation by Application:

Pharmaceuticals

Agrochemicals

Food & Flavors

Fine Chemicals

Environmental & Forensic

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Daicel Corporation

Regis Technologies

Phenomenex

YMC Co., Ltd.

Nacalai Tesque

Merck KGaA

ES Industries

Shinwa Chemical Industries

GL Sciences

Kromasil

Suzhou NanoMicro Technology

YMC Shanghai

Welch Materials

Dalian Elite Analytical Instruments

Sepax Technologies

Hanbon Science & Technology

SinoChrom OSD

Jiangxi Aiyi High Tech

Key Questions Addressed in this Report

What is the 10-year outlook for the global Chiral Stationary Phase?CSP? market?

What factors are driving Chiral Stationary Phase?CSP? market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Chiral Stationary Phase?CSP? market opportunities vary by end market size?

How does Chiral Stationary Phase?CSP? break out by Type, by Application?

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