

Global Cyano Chromatography Packing Market Growth 2026-2032

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Abstracts

The global Cyano Chromatography Packing market size is predicted to grow from US\$ 84.13 million in 2025 to US\$ 124 million in 2032; it is expected to grow at a CAGR of 5.7% from 2026 to 2032.

Cyano (CN) chromatography media are liquid chromatography stationary phases based on spherical silica, hybrid silica, core-shell silica, or polymer microspheres, functionalized with cyanopropyl or related cyano ligands. These materials can operate under normal-phase, reversed-phase, and hydrophilic interaction-related separation modes. They are used for the analysis and preparative purification of moderately polar compounds, highly hydrophobic compounds, pharmaceutical impurities, natural products, and structurally similar small molecules. The estimated gross margin is approximately 55%.

Cyano stationary phases are a specialized class of polar bonded phases in HPLC. Their market size is significantly smaller than mainstream reversed-phase media such as C18 and C8, but they typically exhibit higher unit value, higher method validation cost, and stronger customer stickiness. Demand is mainly driven by pharmaceutical quality research, impurity profiling, food and environmental testing, natural product separation, and small-scale preparative purification. Customers generally purchase based on established analytical methods, pharmacopeia compliance, and chromatographic performance (especially peak shape and selectivity), rather than on price alone.

The key value of cyano phases lies in providing orthogonal selectivity relative to conventional reversed-phase columns. The cyano ligand enables dipole interactions, weak hydrophobic interactions, and partial π interactions, making it suitable for compounds that are poorly retained or excessively retained on C18 columns, or that

show poor equilibration or inconsistent surface interactions on bare silica phases. Purchasing decisions are therefore heavily driven by batch-to-batch consistency, low metal content, minimal tailing, stable efficiency, and reliable method transfer.

Future growth is expected to come more from method upgrades, expansion of UHPLC applications, and high-end domestic substitution rather than replacement of mainstream reversed-phase materials. Opportunities exist in sub-2 µm particles, core-shell architectures, preparative wide-pore materials, and cyano-based mixed-mode stationary phases. However, market penetration depends on pharmacopeia coverage, long-term stability datasets, and scalable production capability for consistent batch supply.

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

This Insight Report provides a comprehensive analysis of the global Cyano Chromatography Packing 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 Cyano Chromatography Packing portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Cyano Chromatography Packing market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Cyano Chromatography Packing 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 Cyano Chromatography Packing.

This report presents a comprehensive overview, market shares, and growth opportunities of Cyano Chromatography Packing market by product type, application,

key manufacturers and key regions and countries.

Segmentation by Type:

Spherical Silica Cyano Packing

Hybrid Silica Cyano Packing

Core-Shell Cyano Packing

Polymer-Based Cyano Packing

Mixed-Mode Cyano Packing

Segmentation by Particle Size:

Sub-2 μ m

2-3 μ m

3-5 μ m

5-10 μ m

Above 10 μ m

Segmentation by Pore Size:

60-90 $\text{\AA}$

100-150 $\text{\AA}$

200-300 $\text{\AA}$

Above 300 $\text{\AA}$

Other Pore Sizes

Segmentation by Surface Treatment:

Endcapped Cyano

Non-Endcapped Cyano

High-Coverage Cyano

Low-Carbon Load Cyano

Mixed-Ligand Cyano

Segmentation by Application:

Normal-Phase Separation

Reversed-Phase Separation

Polar Compound Analysis

Preparative Purification

Quality Control and Method Development

Other Applications

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.

Merck

Agilent

Waters

Thermo Fisher Scientific

Phenomenex

YMC

GL Sciences

Nouryon

SiliCycle

Sepax Technologies

Restek

KNAUER

Macherey-Nagel

Nacalai Tesque

Welch Materials

Dr. Maisch

Key Questions Addressed in this Report

What is the 10-year outlook for the global Cyano Chromatography Packing market?

What factors are driving Cyano Chromatography Packing market growth, globally and by region?

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

How do Cyano Chromatography Packing market opportunities vary by end market size?

How does Cyano Chromatography Packing break out by Type, by Application?

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