

Global HILIC Chromatography Media Market Growth 2026-2032

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Abstracts

The global HILIC Chromatography Media market size is predicted to grow from US\$ 81.19 million in 2025 to US\$ 114 million in 2032; it is expected to grow at a CAGR of 5.0% from 2026 to 2032.

HILIC (Hydrophilic Interaction Liquid Chromatography) stationary phases are chromatographic media designed for hydrophilic interaction liquid chromatography. They are typically based on high-purity silica, core-shell silica, hybrid organic-inorganic particles, or polymer microspheres, and are functionalized with bare silanol, diol, amide, amino, zwitterionic, or mixed-mode groups to enable retention and separation of highly polar, hydrophilic, and ionic compounds. Applications include pharmaceutical impurities, metabolites, sugars, glycoforms, nucleotides, and polar small-molecule analysis. The estimated gross margin is approximately 55%.

Demand for HILIC media is primarily driven by analytical challenges where reversed-phase chromatography fails to retain highly polar analytes, particularly in drug impurities, metabolites, carbohydrates, nucleotides, and charged small molecules. With the widespread adoption of LC-MS systems, the high organic mobile phase conditions used in HILIC improve ionization efficiency and sensitivity, making it increasingly a routine tool in pharmaceutical R&D, clinical mass spectrometry, and omics-based analysis rather than a niche complementary method.

Competitive differentiation is no longer limited to basic HILIC retention capability, but increasingly depends on batch reproducibility, low metal content, minimal nonspecific adsorption, pH stability, and LC-MS compatibility. Leading suppliers are advancing through hybrid particles, core-shell technologies, zwitterionic phases, and specialized glycan analysis columns to improve method robustness. Smaller manufacturers tend to

compete in bulk media supply, custom particle sizing, and cost-driven segments.

Although the overall market size is smaller than mainstream reversed-phase media such as C18, HILIC materials typically command higher technical barriers and pricing. Future growth is expected from biopharmaceutical glycan profiling, metabolomics, food safety testing, and clinical diagnostics. The market is unlikely to commoditize quickly and will likely remain a high-margin, application-diverse, and validation-driven specialty segment.

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

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

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

This report presents a comprehensive overview, market shares, and growth opportunities of HILIC Chromatography Media market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Bare Silica HILIC

Diol HILIC

Amide HILIC

Amino HILIC

Zwitterionic HILIC

Mixed-Mode HILIC

Polymer-Based HILIC

Segmentation by Matrix and Particle Structure:

Fully Porous Silica

Core-Shell Silica

Hybrid Organic-Inorganic Particles

Polymer Particles

Monodisperse Silica

Monolithic Media

Segmentation by Particle Size Grade:

Sub-2 μ m UHPLC Grade

2-3 μ m High-Efficiency Grade

3-5 μ m Analytical HPLC Grade

5-10 μ m Semi-Preparative Grade

>10 µm Preparative and Bulk Grade

Segmentation by Pore Size Grade:

60-80 µm Small-Pore Grade

90-120 µm Standard-Pore Grade

150-200 µm Medium-Pore Grade

300 µm Wide-Pore Grade

Non-Porous and Proprietary Grade

Segmentation by Application:

Pharmaceutical Quality Control

Biopharmaceutical Glycan Analysis

Metabolomics and Lipidomics

Clinical Bioanalysis

Food and Environmental Testing

Preparative Purification and Other

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

Waters

Agilent Technologies

Thermo Fisher Scientific

Phenomenex

Tosoh Bioscience

YMC

GL Sciences

HILICON

Sepax Technologies

SIELC Technologies

Macherey-Nagel

Restek

Avantor ACE

Osaka Soda

NanoMicro Technology

Nouryon

Welch Materials

Dikma Technologies

SiliCycle

Dr. Maisch

Nacalai Tesque

Advanced Materials Technology

Fortis Technologies

Key Questions Addressed in this Report

What is the 10-year outlook for the global HILIC Chromatography Media market?

What factors are driving HILIC Chromatography Media market growth, globally and by region?

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

How do HILIC Chromatography Media market opportunities vary by end market size?

How does HILIC Chromatography Media break out by Type, by Application?

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