

Preparative and Process Chromatography Market by Product [Preparative (Columns, System), Process (Resins, Services)], Application (Vaccines, Peptides & Oligonucleotides), End User (Food & Nutraceutical Companies, Others), Region - Global Forecast to 2031

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Report description:

The global preparative and process chromatography market is projected to reach USD 21.50 billion by 2031 from USD 14.32 billion in 2026, growing at a CAGR of 8.2% during the forecast period.

<https://mnmimg.marketsandmarkets.com/Images/preparative-process-chromatography-market-img-overview.webp>

Vaccines and recombinant proteins using new modalities such as CGT, oligos, and mRNA are expected to grow in volume as demand for more personalized treatments rises in some developed economies. With increased volume, this diversity of biologics needs to be purified. These shifts make chromatography a critical unit operation, especially for capture and purification, creating space for market growth. The global monoclonal antibody (mAb) pipeline is expanding, marked by high FDA approvals and new bispecific and antibody-drug conjugate launches. This has helped boost purification requirements among end users, which is expected to increase the market for preparative and process chromatography products.

"Based on product type, process chromatography products held the largest share of the market in 2025."

Based on product, the preparative and process chromatography market is segmented into preparative chromatography and process chromatography. Process chromatography accounted for the largest share of the market. Global pharmaceutical and biopharmaceutical end users-which include major pharma facilities and CDMOs-are focused on commercial downstream workflows designed for process chromatography rather than preparative stages. New plants or large-scale manufacturing facilities drive

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recurring, multi-year demand for process resins, columns, and services. These factors helped process-scale chromatography products capture the largest share of the global market.

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"Based on applications, the monoclonal antibodies and recombinant proteins segment held the largest share in 2025."

By application, the market for preparative and process chromatography is categorized into monoclonal antibodies & recombinant proteins, vaccines, peptides and oligonucleotides, cell and gene therapies, and other applications. The monoclonal antibodies & recombinant proteins production application acquired the largest market share in 2025. Monoclonal antibodies (mAbs) have become a widely adopted biotherapeutic modality across oncology, immunology, infectious disease, and rare disease indications. Regulatory pathways are well established, manufacturing processes are standardized, and biosimilar competition has driven market growth. Standardized, multi-step purification workflows drive consistent resin and consumables demand. The industry has converged on proven three-step chromatography trains for mAb purification: Protein A affinity capture (to isolate the target antibody from cell culture fluid), intermediate polishing (typically ion-exchange to remove aggregates and remaining impurities), and final polishing (to achieve specification-grade purity and remove residual ligands). These factors have helped the monoclonal antibodies & recombinant proteins production application segment acquire the largest share.

"Based on end user, the pharma and biopharma companies segment accounted for the largest share in 2025."

By end user, the preparative and process chromatography market is categorized into pharma & biopharma companies, food & nutraceutical companies, research & academia, and other end users. Pharma & biopharma companies held the largest share in 2024. Integrated pharmaceutical and biopharmaceutical manufacturers represent the anchor customer base for preparative and process chromatography, driven by their need to produce large-scale commercial biologics with consistent quality, high yield, and regulatory compliance. These organizations operate dedicated downstream facilities optimized for mAb, recombinant protein, and vaccine purification, requiring a continuous supply of resins, columns, systems, and technical support. Large pharma companies maintain in-house process development and manufacturing expertise and invest heavily in advanced chromatography platforms. The stability and scale of these operations, combined with their strict quality and regulatory requirements, make them a key end user segment with significant demand. These factors have helped them acquire the largest share.

"North America is expected to hold a significant share in the preparative and process chromatography market throughout the forecast period."

The preparative and process chromatography market comprises five main regions: North America, Europe, Asia Pacific, Latin America, and the Middle East & Africa. In 2025, North America held a significant share of the market for preparative and process chromatography products. Its dominant position stems from increased manufacturing capacity focused on both commercial-scale and clinical-trial supply production. Investment trends indicate that US federal and state support promotes domestic biomanufacturing for pandemic preparedness and to reduce reliance on international supply chains. Small- to mid-sized biotech firms are increasingly partnering with CDMOs. These factors helped North America secure the largest market share in 2025.

A breakdown of the primary participants referred to for this report is provided below:

-□By Company Type: Tier 1 (35%), Tier 2 (45%), and Tier 3 (20%)

-□By Designation: C-level Executives (35%), Directors (25%), and Others (40%)

-□By Region: North America (40%), Europe (30%), Asia Pacific (20%), Latin America (5%), and the Middle East & Africa (5%)

The key players profiled in the preparative and process chromatography market are Danaher Corporation (US), Repligen Corporation (US), Merck KGaA (Germany), Thermo Fisher Scientific (US), Agilent Technologies, Inc. (US), Bio-Rad Laboratories, Inc. (US), Avantor, Inc. (US), Sartorius AG (Germany), Shimadzu Corporation (Japan), Ecolab Inc. (US), Tosoh Bioscience (Japan), Mitsubishi Chemical Group Corporation (Japan), Revvity (US), PerkinElmer (US), Cecil Instruments Limited (UK), W.R. Grace & Co.

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(US), Ecom SPO (Czech Republic), BUCHI Labortechnik AG (Switzerland), Good Science (Tianjin) Instrument Technologies Co., Ltd. (China), Bio Works Technologies (Sweden), Sykam GmbH (Germany), Sunresin New Materials Co., Ltd. (China), YMC Co., Ltd. (Japan), and Geno Technology Inc. (US)

Research Coverage

The research report analyzes the preparative and process chromatography market by product, application, end user, and region. It examines the factors driving market growth, the challenges and opportunities across industries, and the competitive landscape, including market leaders and small- to medium-sized enterprises. It also estimates revenue for different market segments across five regions and includes a micromarket analysis.

Reasons to Buy the Report

The report will help market leaders and new entrants by providing accurate revenue estimates for the entire preparative and process chromatography market and its subsegments. It will help stakeholders understand the competitive landscape, enabling them to position their businesses more effectively and develop suitable go-to-market strategies. Additionally, the report offers insights into market dynamics, including key drivers, restraints, challenges, and opportunities.

This report provides insightful data on the following.

- Market Penetration: In-depth coverage of product portfolios offered by the top players in the preparative and process chromatography market
- Product Development/Innovation: In-depth coverage of product portfolios offered by the top players in the preparative and process chromatography market
- Market Development: Insightful data on profitable developing areas
- Market Diversification: Details about recent developments and advancements in the preparative and process chromatography market
- Competitive Assessment: Extensive assessment of the products, growth tactics, revenue projections, and market categories of the top competitors

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