

Global Immunochromatography NC Membrane Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Immunochromatography NC Membrane market size is expected to reach \$ 175 million by 2032, rising at a market growth of 8.1% CAGR during the forecast period (2026-2032).

Immunochromatography (NC) membrane refers to the porous, capillary-driven substrate material in lateral flow test strips that enables liquid transport and immunoreaction on the strip. In its narrower, most common usage in the industry, the term primarily refers to the analytical/reaction membrane, typically a nitrocellulose (NC) membrane laminated onto a backing. NC membranes possess strong capillary action and high protein binding capacity, allowing the capture of biological reagents to be immobilized on both the test and control lines. As the liquid sample migrates laterally via capillary action, labeled detection conjugates (gold, latex, fluorescent particles, etc.) form complexes with the target analyte; these complexes are captured on the test line, producing a visible/quantifiable signal, while the control line confirms proper flow and reagent function. Note: In this report, 'nitrocellulose (NC) membrane' refers only to the LFIA analytical/reaction membrane used in lateral flow test strips and does not include nitrocellulose membranes used for Western blotting.

In 2025, the global Immunochromatography NC Membrane manufacturer's gross profit margin is estimated to be between 44.36% and 59.54%. Depending on the product's form, some companies use 'rolls' (100 meters/roll) as the unit of measurement, while others use 'sheets' or 'square meters' (1 square meter/sheet). Prices vary depending on product specifications. Retail prices are approximately US\$100-285 per roll, with leading international companies generally charging higher prices than Chinese manufacturers. Company production capacity varies; some small companies have only one production line, producing 3,000 rolls per month, while others produce approximately 300,000

square meters per year. This report calculates usage based on 'test counts,' projecting a global Immunochromatography NC Membrane production of 9,556 million tests in 2025. Upstream: Raw materials: cellulose (nitrocellulose, cellulose acetate, wetting agent liquid), solvents (methyl acetate, ethanol, dibutanol), PET film, glassine paper; Equipment: coating and cutting equipment, quality testing equipment, etc.; Downstream: in vitro diagnostics (IVD) and point-of-care testing (POCT) companies.

Market Trends

1. In 2023 and 2024, as the impact of the pandemic subsided, both sales volume and prices declined. Consequently, total market revenue in 2024 was lower than in 2021.
2. Products can be categorized into two types: membranes with a thickness of no more than 250 micrometers and membranes with a thickness greater than 250 micrometers. Membranes with a thickness of no more than 250 micrometers will be used in both 2024 and 2025. In 2025, 250 µm lateral flow immunoassay membranes will account for 89.3% of the global sales market share.
3. Applications are wide-ranging; this report categorizes them into medical diagnostics and point-of-care testing (POC), substance abuse detection, food safety and the environment, and other applications. The medical diagnostics and point-of-care testing (POC) sector is the most widely used application area, projected to account for approximately 79.82% of the global market size by 2025.
4. The United States, the European Union, China, and India are currently the main suppliers.
5. The Asia-Pacific region has been the largest market region globally for the past few years and is expected to continue growing in the coming years. It is projected that by 2024, the Asia-Pacific region will account for approximately 41.54% of the global market share, while Europe and North America will account for approximately 27.63% and 23.83%, respectively.
6. Merck, Sartorius, Danaher (Cytiva), AMD (MDI), and Suzhou Tianren are the major manufacturers in the global Immunochromatography NC Membrane market. It is projected that by 2025, the top five manufacturers will account for approximately 80.15% of the global market share.

Market Overview

Multi-scenario, Long-Cycle Consumption: Following the peak of the COVID-19 pandemic, lateral flow immunoassay (LFA) has maintained stable demand in areas such as infectious diseases, women's health, substance abuse, food safety, and veterinary testing. Looking ahead, demand will be driven by diversified testing product portfolios rather than single blockbuster products; therefore, the continuity of NC

membrane supply and batch-to-batch consistency will receive greater attention.

Home Testing and Retail Channel Expansion, Intensified Price Competition: Home testing remains the primary driver of demand for lateral flow immunoassay (LFA) (especially in women's health and respiratory infections). In the future, more testing will shift to home testing, which will drive the development of NC membranes towards high-throughput roll-to-roll supply, automation-friendly specifications, and stricter control over capillary rate variations and background values. In terms of cost, post-pandemic, human chorionic gonadotropin (HCG) testing is the largest application area in the market. As the field is quite mature, companies compete by lowering prices and costs, with most using 20mm or 18mm pure nitrocellulose (NC) products.

High sensitivity and lower detection limits: Recent LFA development focuses on improving sensitivity and specificity (including signal enhancement, sample enrichment, advanced labeling, and improved analytical methods). A corresponding trend at the membrane end is that developers are increasingly focusing on balancing speed and performance through capillary action time (slower capillary action times generally improve sensitivity), pore structure, and surfactant treatment, making membrane screening a key step in assay optimization.

Multiple detection and more detection lines: Lateral flow immunochromatography (LFA) (detection of multiple targets on a single strip/cassette) is a significant advancement in rapid diagnostics. This raises the requirements for membranes, including uniform surface chemistry/porosity, clean and consistent multi-strip performance, lower background, and stable lateral flow characteristics—which often leads to a more segmented membrane portfolio (offering multiple SKUs based on capillary action rate/pore structure/surfactant system).

High-throughput, automated, and standardized membranes: Demand for lateral flow immunochromatography (LFA) membranes is expected to continue to grow, particularly for high-throughput, automated, and standardized membranes, driven by multiplexing, digital readings, point-of-care testing (POCT), and their wider applications in public health, food safety, and environmental monitoring. Suppliers capable of scaling up production capacity, ensuring consistent quality, and building global supply chain resilience will solidify their competitive advantage in the evolving diagnostics field.

This report studies the global Immunochromatography NC Membrane production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Immunochemistry NC Membrane 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 Immunochemistry NC Membrane that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Immunochemistry NC Membrane total production and demand, 2021-2032, (M Tests)

Global Immunochemistry NC Membrane total production value, 2021-2032, (USD Million)

Global Immunochemistry NC Membrane production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (M Tests), (based on production site)

Global Immunochemistry NC Membrane consumption by region & country, CAGR, 2021-2032 & (M Tests)

U.S. VS China: Immunochemistry NC Membrane domestic production, consumption, key domestic manufacturers and share

Global Immunochemistry NC Membrane production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (M Tests)

Global Immunochemistry NC Membrane production by Type, production, value, CAGR, 2021-2032, (USD Million) & (M Tests)

Global Immunochemistry NC Membrane production by Application, production, value, CAGR, 2021-2032, (USD Million) & (M Tests)

This report profiles key players in the global Immunochemistry NC Membrane 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 Merck, Sartorius, Danaher (Cytiva), Advantec, Advanced Microdevices (MDI), Equinox Biotech, Tianren, Zhejiang Tailin Bioengineering, BSK Basic, Beijia New Material, 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 Immunochemistry NC Membrane market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (M Tests) and average price (US\$/K Tests) 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 Immunochromatography NC Membrane Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Immunochromatography NC Membrane Market, Segmentation by Type:Thickness max. 250 μm Thickness above 250 μm **Global Immunochromatography NC Membrane Market, Segmentation by Material:**

Polyester-backed NC

Unbacked Nitrocellulose (NC)

Global Immunoassay NC Membrane Market, Segmentation by Wicking Rate (s/4 cm):

Standard-Flow (Medium): 100–140s/4cm

High-Flow (Fast): 140s/4cm

Global Immunoassay NC Membrane Market, Segmentation by Application:

Medical Diagnostics and Point-of-Care (POC)

Drug of Abuse Testing

Food Safety and Environmental

Other Applications

Companies Profiled:

Merck

Sartorius

Danaher (Cytiva)

Advantec

Advanced Microdevices (MDI)

Equinox Biotech

Tianren

Zhejiang Tailin Bioengineering

BSK Basic

Beijia New Material

Kingfa

Cobetter

Key Questions Answered:

1. How big is the global Immunochromatography NC Membrane market?
2. What is the demand of the global Immunochromatography NC Membrane market?
3. What is the year over year growth of the global Immunochromatography NC Membrane market?
4. What is the production and production value of the global Immunochromatography NC Membrane market?
5. Who are the key producers in the global Immunochromatography NC Membrane market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Automotive MEMS Component Foundry Service Introduction
- 1.2 World Automotive MEMS Component Foundry Service Market Size & Forecast (2021 & 2025 & 2032)
- 1.3 World Automotive MEMS Component Foundry Service Total Market by Region (by Headquarter Location)
 - 1.3.1 World Automotive MEMS Component Foundry Service Market Size by Region (2021-2032), (by Headquarter Location)
 - 1.3.2 United States Based Company Automotive MEMS Component Foundry Service Revenue (2021-2032)
 - 1.3.3 China Based Company Automotive MEMS Component Foundry Service Revenue (2021-2032)
 - 1.3.4 Europe Based Company Automotive MEMS Component Foundry Service Revenue (2021-2032)
 - 1.3.5 Japan Based Company Automotive MEMS Component Foundry Service Revenue (2021-2032)
 - 1.3.6 South Korea Based Company Automotive MEMS Component Foundry Service Revenue (2021-2032)
 - 1.3.7 ASEAN Based Company Automotive MEMS Component Foundry Service Revenue (2021-2032)
 - 1.3.8 India Based Company Automotive MEMS Component Foundry Service Revenue (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Automotive MEMS Component Foundry Service Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Automotive MEMS Component Foundry Service Consumption Value (2021-2032)
- 2.2 World Automotive MEMS Component Foundry Service Consumption Value by Region
 - 2.2.1 World Automotive MEMS Component Foundry Service Consumption Value by Region (2021-2026)
 - 2.2.2 World Automotive MEMS Component Foundry Service Consumption Value

Forecast by Region (2027-2032)

2.3 United States Automotive MEMS Component Foundry Service Consumption Value (2021-2032)

2.4 China Automotive MEMS Component Foundry Service Consumption Value (2021-2032)

2.5 Europe Automotive MEMS Component Foundry Service Consumption Value (2021-2032)

2.6 Japan Automotive MEMS Component Foundry Service Consumption Value (2021-2032)

2.7 South Korea Automotive MEMS Component Foundry Service Consumption Value (2021-2032)

2.8 ASEAN Automotive MEMS Component Foundry Service Consumption Value (2021-2032)

2.9 India Automotive MEMS Component Foundry Service Consumption Value (2021-2032)

3 WORLD AUTOMOTIVE MEMS COMPONENT FOUNDRY SERVICE COMPANIES COMPETITIVE ANALYSIS

3.1 World Automotive MEMS Component Foundry Service Revenue by Player (2021-2026)

3.2 Industry Rank and Concentration Rate (CR)

3.2.1 Global Automotive MEMS Component Foundry Service Industry Rank of Major Players

3.2.2 Global Concentration Ratios (CR4) for Automotive MEMS Component Foundry Service in 2025

3.2.3 Global Concentration Ratios (CR8) for Automotive MEMS Component Foundry Service in 2025

3.3 Automotive MEMS Component Foundry Service Company Evaluation Quadrant

3.4 Automotive MEMS Component Foundry Service Market: Overall Company Footprint Analysis

3.4.1 Automotive MEMS Component Foundry Service Market: Region Footprint

3.4.2 Automotive MEMS Component Foundry Service Market: Company Product Type Footprint

3.4.3 Automotive MEMS Component Foundry Service Market: Company Product Application Footprint

3.5 Competitive Environment

3.5.1 Historical Structure of the Industry

3.5.2 Barriers of Market Entry

- 3.5.3 Factors of Competition
- 3.6 Mergers & Acquisitions Activity

4 UNITED STATES VS CHINA VS REST OF WORLD (BY HEADQUARTER LOCATION)

4.1 United States VS China: Automotive MEMS Component Foundry Service Revenue Comparison (by Headquarter Location)

4.1.1 United States VS China: Automotive MEMS Component Foundry Service Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)

4.1.2 United States VS China: Automotive MEMS Component Foundry Service Revenue Market Share Comparison (2021 & 2025 & 2032)

4.2 United States Based Companies VS China Based Companies: Automotive MEMS Component Foundry Service Consumption Value Comparison

4.2.1 United States VS China: Automotive MEMS Component Foundry Service Consumption Value Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Automotive MEMS Component Foundry Service Consumption Value Market Share Comparison (2021 & 2025 & 2032)

4.3 United States Based Automotive MEMS Component Foundry Service Companies and Market Share, 2021-2026

4.3.1 United States Based Automotive MEMS Component Foundry Service Companies, Headquarters (States, Country)

4.3.2 United States Based Companies Automotive MEMS Component Foundry Service Revenue, (2021-2026)

4.4 China Based Companies Automotive MEMS Component Foundry Service Revenue and Market Share, 2021-2026

4.4.1 China Based Automotive MEMS Component Foundry Service Companies, Company Headquarters (Province, Country)

4.4.2 China Based Companies Automotive MEMS Component Foundry Service Revenue, (2021-2026)

4.5 Rest of World Based Automotive MEMS Component Foundry Service Companies and Market Share, 2021-2026

4.5.1 Rest of World Based Automotive MEMS Component Foundry Service Companies, Headquarters (Province, Country)

4.5.2 Rest of World Based Companies Automotive MEMS Component Foundry Service Revenue (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Automotive MEMS Component Foundry Service Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Pure Play Model

5.2.2 IDM Model

5.3 Market Segment by Type

5.3.1 World Automotive MEMS Component Foundry Service Market Size by Type (2021-2026)

5.3.2 World Automotive MEMS Component Foundry Service Market Size by Type (2027-2032)

5.3.3 World Automotive MEMS Component Foundry Service Market Size Market Share by Type (2027-2032)

6 MARKET ANALYSIS BY TECHNOLOGY

6.1 World Automotive MEMS Component Foundry Service Market Size Overview by Technology: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Technology

6.2.1 Traditional MEMS

6.2.2 Advanced MEMS

6.2.3 Intelligent MEMS

6.3 Market Segment by Technology

6.3.1 World Automotive MEMS Component Foundry Service Market Size by Technology (2021-2026)

6.3.2 World Automotive MEMS Component Foundry Service Market Size by Technology (2027-2032)

6.3.3 World Automotive MEMS Component Foundry Service Market Size Market Share by Technology (2027-2032)

7 MARKET ANALYSIS BY FUNCTIONAL CATEGORY

7.1 World Automotive MEMS Component Foundry Service Market Size Overview by Functional Category: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Functional Category

7.2.1 Safety Monitoring

7.2.2 Environmental Perception

7.2.3 Power Control

7.2.4 Intelligent Driving

7.3 Market Segment by Functional Category

7.3.1 World Automotive MEMS Component Foundry Service Market Size by Functional Category (2021-2026)

7.3.2 World Automotive MEMS Component Foundry Service Market Size by Functional Category (2027-2032)

7.3.3 World Automotive MEMS Component Foundry Service Market Size Market Share by Functional Category (2027-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Automotive MEMS Component Foundry Service Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Accelerometer

8.2.2 Gyroscope

8.2.3 Digital Compass

8.2.4 Audio Sensor

8.2.5 Pressure Sensor

8.2.6 Temperature Sensor

8.2.7 Others

8.3 Market Segment by Application

8.3.1 World Automotive MEMS Component Foundry Service Market Size by Application (2021-2026)

8.3.2 World Automotive MEMS Component Foundry Service Market Size by Application (2027-2032)

8.3.3 World Automotive MEMS Component Foundry Service Market Size Market Share by Application (2021-2032)

9 COMPANY PROFILES

9.1 Silex Microsystems

9.1.1 Silex Microsystems Details

9.1.2 Silex Microsystems Major Business

9.1.3 Silex Microsystems Automotive MEMS Component Foundry Service Product and Services

9.1.4 Silex Microsystems Automotive MEMS Component Foundry Service Revenue, Gross Margin and Market Share (2021-2026)

9.1.5 Silex Microsystems Recent Developments/Updates

9.1.6 Silex Microsystems Competitive Strengths & Weaknesses

9.2 Teledyne Technologies

- 9.2.1 Teledyne Technologies Details
- 9.2.2 Teledyne Technologies Major Business
- 9.2.3 Teledyne Technologies Automotive MEMS Component Foundry Service Product and Services
- 9.2.4 Teledyne Technologies Automotive MEMS Component Foundry Service Revenue, Gross Margin and Market Share (2021-2026)
- 9.2.5 Teledyne Technologies Recent Developments/Updates
- 9.2.6 Teledyne Technologies Competitive Strengths & Weaknesses
- 9.3 TSMC
 - 9.3.1 TSMC Details
 - 9.3.2 TSMC Major Business
 - 9.3.3 TSMC Automotive MEMS Component Foundry Service Product and Services
 - 9.3.4 TSMC Automotive MEMS Component Foundry Service Revenue, Gross Margin and Market Share (2021-2026)
 - 9.3.5 TSMC Recent Developments/Updates
 - 9.3.6 TSMC Competitive Strengths & Weaknesses
- 9.4 Sony
 - 9.4.1 Sony Details
 - 9.4.2 Sony Major Business
 - 9.4.3 Sony Automotive MEMS Component Foundry Service Product and Services
 - 9.4.4 Sony Automotive MEMS Component Foundry Service Revenue, Gross Margin and Market Share (2021-2026)
 - 9.4.5 Sony Recent Developments/Updates
 - 9.4.6 Sony Competitive Strengths & Weaknesses
- 9.5 X-Fab
 - 9.5.1 X-Fab Details
 - 9.5.2 X-Fab Major Business
 - 9.5.3 X-Fab Automotive MEMS Component Foundry Service Product and Services
 - 9.5.4 X-Fab Automotive MEMS Component Foundry Service Revenue, Gross Margin and Market Share (2021-2026)
 - 9.5.5 X-Fab Recent Developments/Updates
 - 9.5.6 X-Fab Competitive Strengths & Weaknesses
- 9.6 Atomica Corp.
 - 9.6.1 Atomica Corp. Details
 - 9.6.2 Atomica Corp. Major Business
 - 9.6.3 Atomica Corp. Automotive MEMS Component Foundry Service Product and Services
 - 9.6.4 Atomica Corp. Automotive MEMS Component Foundry Service Revenue, Gross Margin and Market Share (2021-2026)

9.6.5 Atomica Corp. Recent Developments/Updates

9.6.6 Atomica Corp. Competitive Strengths & Weaknesses

9.7 VIS

9.7.1 VIS Details

9.7.2 VIS Major Business

9.7.3 VIS Automotive MEMS Component Foundry Service Product and Services

9.7.4 VIS Automotive MEMS Component Foundry Service Revenue, Gross Margin and Market Share (2021-2026)

9.7.5 VIS Recent Developments/Updates

9.7.6 VIS Competitive Strengths & Weaknesses

9.8 Asia Pacific Microsystems, Inc.

9.8.1 Asia Pacific Microsystems, Inc. Details

9.8.2 Asia Pacific Microsystems, Inc. Major Business

9.8.3 Asia Pacific Microsystems, Inc. Automotive MEMS Component Foundry Service Product and Services

9.8.4 Asia Pacific Microsystems, Inc. Automotive MEMS Component Foundry Service Revenue, Gross Margin and Market Share (2021-2026)

9.8.5 Asia Pacific Microsystems, Inc. Recent Developments/Updates

9.8.6 Asia Pacific Microsystems, Inc. Competitive Strengths & Weaknesses

9.9 Philips Engineering Solutions

9.9.1 Philips Engineering Solutions Details

9.9.2 Philips Engineering Solutions Major Business

9.9.3 Philips Engineering Solutions Automotive MEMS Component Foundry Service Product and Services

9.9.4 Philips Engineering Solutions Automotive MEMS Component Foundry Service Revenue, Gross Margin and Market Share (2021-2026)

9.9.5 Philips Engineering Solutions Recent Developments/Updates

9.9.6 Philips Engineering Solutions Competitive Strengths & Weaknesses

9.10 UMC

9.10.1 UMC Details

9.10.2 UMC Major Business

9.10.3 UMC Automotive MEMS Component Foundry Service Product and Services

9.10.4 UMC Automotive MEMS Component Foundry Service Revenue, Gross Margin and Market Share (2021-2026)

9.10.5 UMC Recent Developments/Updates

9.10.6 UMC Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 Automotive MEMS Component Foundry Service Industry Chain
- 10.2 Automotive MEMS Component Foundry Service Upstream Analysis
- 10.3 Automotive MEMS Component Foundry Service Midstream Analysis
- 10.4 Automotive MEMS Component Foundry Service Downstream Analysis

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

- 12.1 Methodology
- 12.2 Research Process and Data Source
- 12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Immunochromatography NC Membrane Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Immunochromatography NC Membrane Production Value by Region (2021-2026) & (USD Million)

Table 3. World Immunochromatography NC Membrane Production Value by Region (2027-2032) & (USD Million)

Table 4. World Immunochromatography NC Membrane Production Value Market Share by Region (2021-2026)

Table 5. World Immunochromatography NC Membrane Production Value Market Share by Region (2027-2032)

Table 6. World Immunochromatography NC Membrane Production by Region (2021-2026) & (M Tests)

Table 7. World Immunochromatography NC Membrane Production by Region (2027-2032) & (M Tests)

Table 8. World Immunochromatography NC Membrane Production Market Share by Region (2021-2026)

Table 9. World Immunochromatography NC Membrane Production Market Share by Region (2027-2032)

Table 10. World Immunochromatography NC Membrane Average Price by Region (2021-2026) & (US\$/K Tests)

Table 11. World Immunochromatography NC Membrane Average Price by Region (2027-2032) & (US\$/K Tests)

Table 12. Immunochromatography NC Membrane Major Market Trends

Table 13. World Immunochromatography NC Membrane Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (M Tests)

Table 14. World Immunochromatography NC Membrane Consumption by Region (2021-2026) & (M Tests)

Table 15. World Immunochromatography NC Membrane Consumption Forecast by Region (2027-2032) & (M Tests)

Table 16. World Immunochromatography NC Membrane Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Immunochromatography NC Membrane Producers in 2025

Table 18. World Immunochromatography NC Membrane Production by Manufacturer (2021-2026) & (M Tests)

Table 19. Production Market Share of Key Immunochromatography NC Membrane Producers in 2025

Table 20. World Immunochromatography NC Membrane Average Price by Manufacturer (2021-2026) & (US\$/K Tests)

Table 21. Global Immunochromatography NC Membrane Company Evaluation Quadrant

Table 22. World Immunochromatography NC Membrane Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Immunochromatography NC Membrane Production Site of Key Manufacturer

Table 24. Immunochromatography NC Membrane Market: Company Product Type Footprint

Table 25. Immunochromatography NC Membrane Market: Company Product Application Footprint

Table 26. Immunochromatography NC Membrane Competitive Factors

Table 27. Immunochromatography NC Membrane New Entrant and Capacity Expansion Plans

Table 28. Immunochromatography NC Membrane Mergers & Acquisitions Activity

Table 29. United States VS China Immunochromatography NC Membrane Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Immunochromatography NC Membrane Production Comparison, (2021 & 2025 & 2032) & (M Tests)

Table 31. United States VS China Immunochromatography NC Membrane Consumption Comparison, (2021 & 2025 & 2032) & (M Tests)

Table 32. United States Based Immunochromatography NC Membrane Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Immunochromatography NC Membrane Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Immunochromatography NC Membrane Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Immunochromatography NC Membrane Production (2021-2026) & (M Tests)

Table 36. United States Based Manufacturers Immunochromatography NC Membrane Production Market Share (2021-2026)

Table 37. China Based Immunochromatography NC Membrane Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Immunochromatography NC Membrane Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Immunochromatography NC Membrane

Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Immunochromatography NC Membrane Production, (2021-2026) & (M Tests)

Table 41. China Based Manufacturers Immunochromatography NC Membrane Production Market Share (2021-2026)

Table 42. Rest of World Based Immunochromatography NC Membrane Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Immunochromatography NC Membrane Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Immunochromatography NC Membrane Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Immunochromatography NC Membrane Production, (2021-2026) & (M Tests)

Table 46. Rest of World Based Manufacturers Immunochromatography NC Membrane Production Market Share (2021-2026)

Table 47. World Immunochromatography NC Membrane Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Immunochromatography NC Membrane Production by Type (2021-2026) & (M Tests)

Table 49. World Immunochromatography NC Membrane Production by Type (2027-2032) & (M Tests)

Table 50. World Immunochromatography NC Membrane Production Value by Type (2021-2026) & (USD Million)

Table 51. World Immunochromatography NC Membrane Production Value by Type (2027-2032) & (USD Million)

Table 52. World Immunochromatography NC Membrane Average Price by Type (2021-2026) & (US\$/K Tests)

Table 53. World Immunochromatography NC Membrane Average Price by Type (2027-2032) & (US\$/K Tests)

Table 54. World Immunochromatography NC Membrane Production Value by Material, (USD Million), 2021 & 2025 & 2032

Table 55. World Immunochromatography NC Membrane Production by Material (2021-2026) & (M Tests)

Table 56. World Immunochromatography NC Membrane Production by Material (2027-2032) & (M Tests)

Table 57. World Immunochromatography NC Membrane Production Value by Material (2021-2026) & (USD Million)

Table 58. World Immunochromatography NC Membrane Production Value by Material (2027-2032) & (USD Million)

Table 59. World Immunochromatography NC Membrane Average Price by Material (2021-2026) & (US\$/K Tests)

Table 60. World Immunochromatography NC Membrane Average Price by Material (2027-2032) & (US\$/K Tests)

Table 61. World Immunochromatography NC Membrane Production Value by Wicking Rate (s/4 cm), (USD Million), 2021 & 2025 & 2032

Table 62. World Immunochromatography NC Membrane Production by Wicking Rate (s/4 cm) (2021-2026) & (M Tests)

Table 63. World Immunochromatography NC Membrane Production by Wicking Rate (s/4 cm) (2027-2032) & (M Tests)

Table 64. World Immunochromatography NC Membrane Production Value by Wicking Rate (s/4 cm) (2021-2026) & (USD Million)

Table 65. World Immunochromatography NC Membrane Production Value by Wicking Rate (s/4 cm) (2027-2032) & (USD Million)

Table 66. World Immunochromatography NC Membrane Average Price by Wicking Rate (s/4 cm) (2021-2026) & (US\$/K Tests)

Table 67. World Immunochromatography NC Membrane Average Price by Wicking Rate (s/4 cm) (2027-2032) & (US\$/K Tests)

Table 68. World Immunochromatography NC Membrane Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Immunochromatography NC Membrane Production by Application (2021-2026) & (M Tests)

Table 70. World Immunochromatography NC Membrane Production by Application (2027-2032) & (M Tests)

Table 71. World Immunochromatography NC Membrane Production Value by Application (2021-2026) & (USD Million)

Table 72. World Immunochromatography NC Membrane Production Value by Application (2027-2032) & (USD Million)

Table 73. World Immunochromatography NC Membrane Average Price by Application (2021-2026) & (US\$/K Tests)

Table 74. World Immunochromatography NC Membrane Average Price by Application (2027-2032) & (US\$/K Tests)

Table 75. Merck Basic Information, Manufacturing Base and Competitors

Table 76. Merck Major Business

Table 77. Merck Immunochromatography NC Membrane Product and Services

Table 78. Merck Immunochromatography NC Membrane Production (M Tests), Price (US\$/K Tests), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Merck Recent Developments/Updates

- Table 80. Merck Competitive Strengths & Weaknesses
- Table 81. Sartorius Basic Information, Manufacturing Base and Competitors
- Table 82. Sartorius Major Business
- Table 83. Sartorius Immunochemistry NC Membrane Product and Services
- Table 84. Sartorius Immunochemistry NC Membrane Production (M Tests), Price (US\$/K Tests), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 85. Sartorius Recent Developments/Updates
- Table 86. Sartorius Competitive Strengths & Weaknesses
- Table 87. Danaher (Cytiva) Basic Information, Manufacturing Base and Competitors
- Table 88. Danaher (Cytiva) Major Business
- Table 89. Danaher (Cytiva) Immunochemistry NC Membrane Product and Services
- Table 90. Danaher (Cytiva) Immunochemistry NC Membrane Production (M Tests), Price (US\$/K Tests), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 91. Danaher (Cytiva) Recent Developments/Updates
- Table 92. Danaher (Cytiva) Competitive Strengths & Weaknesses
- Table 93. Advantec Basic Information, Manufacturing Base and Competitors
- Table 94. Advantec Major Business
- Table 95. Advantec Immunochemistry NC Membrane Product and Services
- Table 96. Advantec Immunochemistry NC Membrane Production (M Tests), Price (US\$/K Tests), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 97. Advantec Recent Developments/Updates
- Table 98. Advantec Competitive Strengths & Weaknesses
- Table 99. Advanced Microdevices (MDI) Basic Information, Manufacturing Base and Competitors
- Table 100. Advanced Microdevices (MDI) Major Business
- Table 101. Advanced Microdevices (MDI) Immunochemistry NC Membrane Product and Services
- Table 102. Advanced Microdevices (MDI) Immunochemistry NC Membrane Production (M Tests), Price (US\$/K Tests), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 103. Advanced Microdevices (MDI) Recent Developments/Updates
- Table 104. Advanced Microdevices (MDI) Competitive Strengths & Weaknesses
- Table 105. Equinox Biotech Basic Information, Manufacturing Base and Competitors
- Table 106. Equinox Biotech Major Business
- Table 107. Equinox Biotech Immunochemistry NC Membrane Product and

Services

Table 108. Equinox Biotech Immunochromatography NC Membrane Production (M Tests), Price (US\$/K Tests), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Equinox Biotech Recent Developments/Updates

Table 110. Equinox Biotech Competitive Strengths & Weaknesses

Table 111. Tianren Basic Information, Manufacturing Base and Competitors

Table 112. Tianren Major Business

Table 113. Tianren Immunochromatography NC Membrane Product and Services

Table 114. Tianren Immunochromatography NC Membrane Production (M Tests), Price (US\$/K Tests), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. Tianren Recent Developments/Updates

Table 116. Tianren Competitive Strengths & Weaknesses

Table 117. Zhejiang Tailin Bioengineering Basic Information, Manufacturing Base and Competitors

Table 118. Zhejiang Tailin Bioengineering Major Business

Table 119. Zhejiang Tailin Bioengineering Immunochromatography NC Membrane Product and Services

Table 120. Zhejiang Tailin Bioengineering Immunochromatography NC Membrane Production (M Tests), Price (US\$/K Tests), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Zhejiang Tailin Bioengineering Recent Developments/Updates

Table 122. Zhejiang Tailin Bioengineering Competitive Strengths & Weaknesses

Table 123. BSK Basic Basic Information, Manufacturing Base and Competitors

Table 124. BSK Basic Major Business

Table 125. BSK Basic Immunochromatography NC Membrane Product and Services

Table 126. BSK Basic Immunochromatography NC Membrane Production (M Tests), Price (US\$/K Tests), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. BSK Basic Recent Developments/Updates

Table 128. BSK Basic Competitive Strengths & Weaknesses

Table 129. Beijia New Material Basic Information, Manufacturing Base and Competitors

Table 130. Beijia New Material Major Business

Table 131. Beijia New Material Immunochromatography NC Membrane Product and Services

Table 132. Beijia New Material Immunochromatography NC Membrane Production (M Tests), Price (US\$/K Tests), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

- Table 133. Beijia New Material Recent Developments/Updates
- Table 134. Beijia New Material Competitive Strengths & Weaknesses
- Table 135. Kingfa Basic Information, Manufacturing Base and Competitors
- Table 136. Kingfa Major Business
- Table 137. Kingfa Immunochemistry NC Membrane Product and Services
- Table 138. Kingfa Immunochemistry NC Membrane Production (M Tests), Price (US\$/K Tests), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 139. Kingfa Recent Developments/Updates
- Table 140. Kingfa Competitive Strengths & Weaknesses
- Table 141. Cobetter Basic Information, Manufacturing Base and Competitors
- Table 142. Cobetter Major Business
- Table 143. Cobetter Immunochemistry NC Membrane Product and Services
- Table 144. Cobetter Immunochemistry NC Membrane Production (M Tests), Price (US\$/K Tests), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 145. Cobetter Recent Developments/Updates
- Table 146. Cobetter Competitive Strengths & Weaknesses
- Table 147. Global Key Players of Immunochemistry NC Membrane Upstream (Raw Materials)
- Table 148. Global Immunochemistry NC Membrane Typical Customers
- Table 149. Immunochemistry NC Membrane Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Immunochromatography NC Membrane Picture

Figure 2. World Immunochromatography NC Membrane Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Immunochromatography NC Membrane Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Immunochromatography NC Membrane Production (2021-2032) & (M Tests)

Figure 5. World Immunochromatography NC Membrane Average Price (2021-2032) & (US\$/K Tests)

Figure 6. World Immunochromatography NC Membrane Production Value Market Share by Region (2021-2032)

Figure 7. World Immunochromatography NC Membrane Production Market Share by Region (2021-2032)

Figure 8. North America Immunochromatography NC Membrane Production (2021-2032) & (M Tests)

Figure 9. Europe Immunochromatography NC Membrane Production (2021-2032) & (M Tests)

Figure 10. China Immunochromatography NC Membrane Production (2021-2032) & (M Tests)

Figure 11. Japan Immunochromatography NC Membrane Production (2021-2032) & (M Tests)

Figure 12. India Immunochromatography NC Membrane Production (2021-2032) & (M Tests)

Figure 13. Immunochromatography NC Membrane Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World Immunochromatography NC Membrane Consumption (2021-2032) & (M Tests)

Figure 16. World Immunochromatography NC Membrane Consumption Market Share by Region (2021-2032)

Figure 17. United States Immunochromatography NC Membrane Consumption (2021-2032) & (M Tests)

Figure 18. China Immunochromatography NC Membrane Consumption (2021-2032) & (M Tests)

Figure 19. Europe Immunochromatography NC Membrane Consumption (2021-2032) & (M Tests)

- Figure 20. Japan Immunochromatography NC Membrane Consumption (2021-2032) & (M Tests)
- Figure 21. South Korea Immunochromatography NC Membrane Consumption (2021-2032) & (M Tests)
- Figure 22. ASEAN Immunochromatography NC Membrane Consumption (2021-2032) & (M Tests)
- Figure 23. India Immunochromatography NC Membrane Consumption (2021-2032) & (M Tests)
- Figure 24. Producer Shipments of Immunochromatography NC Membrane by Manufacturer Revenue (\$MM) and Market Share (%): 2025
- Figure 25. Global Four-firm Concentration Ratios (CR4) for Immunochromatography NC Membrane Markets in 2025
- Figure 26. Global Four-firm Concentration Ratios (CR8) for Immunochromatography NC Membrane Markets in 2025
- Figure 27. United States VS China: Immunochromatography NC Membrane Production Value Market Share Comparison (2021 & 2025 & 2032)
- Figure 28. United States VS China: Immunochromatography NC Membrane Production Market Share Comparison (2021 & 2025 & 2032)
- Figure 29. United States VS China: Immunochromatography NC Membrane Consumption Market Share Comparison (2021 & 2025 & 2032)
- Figure 30. United States Based Manufacturers Immunochromatography NC Membrane Production Market Share 2025
- Figure 31. China Based Manufacturers Immunochromatography NC Membrane Production Market Share 2025
- Figure 32. Rest of World Based Manufacturers Immunochromatography NC Membrane Production Market Share 2025
- Figure 33. World Immunochromatography NC Membrane Production Value by Type, (USD Million), 2021 & 2025 & 2032
- Figure 34. World Immunochromatography NC Membrane Production Value Market Share by Type in 2025
- Figure 35. Thickness max. 250 μ m
- Figure 36. Thickness above 250 μ m
- Figure 37. World Immunochromatography NC Membrane Production Market Share by Type (2021-2032)
- Figure 38. World Immunochromatography NC Membrane Production Value Market Share by Type (2021-2032)
- Figure 39. World Immunochromatography NC Membrane Average Price by Type (2021-2032) & (US\$/K Tests)
- Figure 40. World Immunochromatography NC Membrane Production Value by Material,

(USD Million), 2021 & 2025 & 2032

Figure 41. World Immunochromatography NC Membrane Production Value Market Share by Material in 2025

Figure 42. Polyester-backed NC

Figure 43. Unbacked Nitrocellulose (NC)

Figure 44. World Immunochromatography NC Membrane Production Market Share by Material (2021-2032)

Figure 45. World Immunochromatography NC Membrane Production Value Market Share by Material (2021-2032)

Figure 46. World Immunochromatography NC Membrane Average Price by Material (2021-2032) & (US\$/K Tests)

Figure 47. World Immunochromatography NC Membrane Production Value by Wicking Rate (s/4 cm), (USD Million), 2021 & 2025 & 2032

Figure 48. World Immunochromatography NC Membrane Production Value Market Share by Wicking Rate (s/4 cm) in 2025

Figure 49. Standard-Flow (Medium): 100–140s/4cm

Figure 50. High-Flow (Fast): 140s/4cm

Figure 52. World Immunochromatography NC Membrane Production Market Share by Wicking Rate (s/4 cm) (2021-2032)

Figure 53. World Immunochromatography NC Membrane Production Value Market Share by Wicking Rate (s/4 cm) (2021-2032)

Figure 54. World Immunochromatography NC Membrane Average Price by Wicking Rate (s/4 cm) (2021-2032) & (US\$/K Tests)

Figure 55. World Immunochromatography NC Membrane Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 56. World Immunochromatography NC Membrane Production Value Market Share by Application in 2025

Figure 57. Medical Diagnostics and Point-of-Care (POC)

Figure 58. Drug of Abuse Testing

Figure 59. Food Safety and Environmental

Figure 60. Other Applications

Figure 61. World Immunochromatography NC Membrane Production Market Share by Application (2021-2032)

Figure 62. World Immunochromatography NC Membrane Production Value Market Share by Application (2021-2032)

Figure 63. World Immunochromatography NC Membrane Average Price by Application (2021-2032) & (US\$/K Tests)

Figure 64. Immunochromatography NC Membrane Industry Chain

Figure 65. Immunochromatography NC Membrane Procurement Model

Figure 66. Immunochromatography NC Membrane Sales Model

Figure 67. Immunochromatography NC Membrane Sales Channels, Direct Sales, and Distribution

Figure 68. Methodology

Figure 69. Research Process and Data Source

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