

Global Immunochromatography NC Membrane Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Immunochromatography NC Membrane market size was valued at US\$ 107 million in 2025 and is forecast to a readjusted size of US\$ 175 million by 2032 with a CAGR of 8.1% during review period.

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 is a detailed and comprehensive analysis for global Immunochromatography NC Membrane market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Immunochromatography NC Membrane market size and forecasts, in consumption value (\$ Million), sales quantity (M Tests), and average selling prices (US\$/K Tests), 2021-2032

Global Immunochromatography NC Membrane market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (M Tests), and average selling prices (US\$/K Tests), 2021-2032

Global Immunochromatography NC Membrane market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (M Tests), and average selling prices (US\$/K Tests), 2021-2032

Global Immunochromatography NC Membrane market shares of main players, shipments in revenue (\$ Million), sales quantity (M Tests), and ASP (US\$/K Tests), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Immunochromatography NC Membrane

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Immunochromatography NC Membrane market based on the following parameters - company overview, sales quantity, revenue, 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.

Market Segmentation

Immunochromatography NC Membrane market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Thickness max. 250 μm

Thickness above 250 μm

Market segment by Material

Polyester?backed NC

Unbacked Nitrocellulose (NC)

Market segment by Wicking Rate (s/4 cm)

Standard-Flow (Medium): 100–140s/4cm

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

Market segment by Application

Medical Diagnostics and Point-of-Care (POC)

Drug of Abuse Testing

Food Safety and Environmental

Other Applications

Major players covered

Merck

Sartorius

Danaher (Cytiva)

Advantec

Advanced Microdevices (MDI)

Equinox Biotech

Tianren

Zhejiang Tailin Bioengineering

BSK Basic

Beijia New Material

Kingfa

Cobetter

Market segment by region, regional analysis covers
North America (United States, Canada, and Mexico)
Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)
Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)
Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Immunochromatography NC Membrane product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Immunochromatography NC Membrane, with price, sales quantity, revenue, and global market share of Immunochromatography NC Membrane from 2021 to 2026.

Chapter 3, the Immunochromatography NC Membrane competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Immunochromatography NC Membrane breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Immunochromatography NC Membrane market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Immunochromatography NC Membrane.

Chapter 14 and 15, to describe Immunochromatography NC Membrane sales channel, distributors, customers, research findings and conclusion.

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