

Global Lateral Flow Immunoassay Membrane Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Lateral Flow Immunoassay 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).

Lateral flow immunoassay membranes refer to the porous, capillary-driven substrate materials in a lateral flow strip that enable fluid transport and on-strip immunoreactions. In a narrow and most common industry usage, the term primarily denotes the analytical/reaction membrane, which is typically a nitrocellulose (NC) membrane laminated on a backing. NC provides strong capillary wicking and high protein-binding capacity, allowing capture bioreagents to be immobilized as test and control lines. As the liquid sample migrates laterally by capillary action, labeled detection conjugates (gold, latex, fluorescent particles, etc.) form complexes with the target analyte; these complexes are captured at the test line to generate a visible/quantifiable signal, while the control line confirms proper flow and reagent function. Note: In this report, ?Nitrocellulose (NC) membrane? refers exclusively to LFIA analytical/reaction membranes used in lateral flow test strips, and does not include nitrocellulose membranes intended for protein transfer (Western blotting).

In 2025, the global gross profit margin for Lateral Flow Immunoassay Membrane manufacturers is projected to be approximately 44.36%-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,' and the global production of Lateral Flow Immunoassay

Membrane is projected to reach 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 inspection equipment, etc.; Downstream mainly consists of IVD and POCT companies.

Market Trends

1. Lateral Flow Immunoassay Membrane reached about 103.54 million USD in 2025 from 120.66 million USD in 2021 all around the world, with the CAGR of -3.8%. This was primarily due to a surge in market demand caused by COVID-19 between 2020 and 2022. The surge in demand and supply chain instability also led to a significant increase in product prices during this period. In 2023 and 2024, as the impact of the pandemic subsided, both the volume and price of the product decreased. Consequently, total market revenue in 2024 was lower than that in 2021.
2. Lateral Flow Immunoassay Membrane can be divided into 2 categories: thickness max. 250 μ m and thickness above 250 μ m. Among them, thickness max. 250 μ m Lateral Flow Immunoassay Membrane account for 89.3% of the global sales market share in 2025.
3. Lateral Flow Immunoassay Membrane has wide range of applications, this report classified them into Medical Diagnostics and Point-of-Care (POC), Drug of Abuse Testing, Food Safety and Environmental and Other Applications. Medical Diagnostics and Point-of-Care (POC) sector was the most widely used area which took up about 79.82% of the global market size in 2025.
4. USA, EU, China, India etc. are now the key providers of Lateral Flow Immunoassay Membrane. The Lateral Flow Immunoassay Membrane market size will reach about 172.64 million USD in 2032 from 103.54 million USD in 2025 all around the world, with the CAGR of 8.3%.
5. Asia Pacific is the largest regions of Lateral Flow Immunoassay Membrane in the world in the past few years and it will keep increasing in the next few years. Asia Pacific took up about 41.54% of the global market in 2024, while Europe and North America were about 27.63%, 23.83%.
6. Merck, Sartorius, Danaher (Cytiva), Advanced Microdevices (MDI), Tianren etc. are the key producers in the global Lateral Flow Immunoassay Membrane market. Top 5 took up only about 80.15% of the global market in 2025.

Market Overview

Multi-Scenario, Long-Cycle Consumption After the COVID peak, LFAs maintain steady consumption across infectious disease, women's health, drugs-of-abuse, food safety, and veterinary testing. Going forward, demand is driven by diversified assay portfolios rather than a single blockbuster, increasing emphasis on supply continuity and lot-to-lot consistency for NC membranes.

Home-Testing and Retail Expansion, Price Competition Home-testing remains a major LFA demand engine (notably women's health and respiratory infections). Ahead, more assays will migrate to self-testing, pushing NC membranes toward high-throughput roll supply, automation-friendly formats, and tighter control of wicking-rate variation and background. In terms of cost, after the pandemic, human chorionic gonadotrophin (HCG) is the largest application area in the market. Because the field is quite mature, companies compete by reducing prices and costs, and most companies use 20mm or 18mm Pure Nitrocellulose (NC) products.

High Sensitivity and Lower LOD Recent LFA research and development has focused on improving sensitivity and specificity (including signal enhancement, sample enrichment, advanced labels, and improved analytics). The corresponding trend at the membrane end is that developers are increasingly emphasizing balancing speed and performance through wicking time (slower wicking times often improve sensitivity), pore structure, and surfactant treatment, making membrane screening a key aspect of assay optimization.

Multiplex and More Test Lines Multiplex LFAs (multiple targets on one strip/cassette) are a major advancement in rapid diagnostics. This raises membrane requirements for uniform surface chemistry/porosity, clean and consistent multi-line striping performance, lower background, and stable lateral flow characteristics—often resulting in more segmented membrane portfolios (multi-SKU offerings by wicking rate/pore structure/surfactant system).

High-flux, automated and standardized membranes The demand for lateral flow immunochromatography (LFA) membranes is expected to continue to grow, particularly for high-throughput, automated, and standardized membranes, as multiplexing, digital readings, point-of-care testing (POCT), and their wider application in public health, food safety, and environmental monitoring. Suppliers capable of scaling up 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 Lateral Flow Immunoassay Membrane production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Lateral Flow Immunoassay Membrane total production and demand, 2021-2032, (M Tests)

Global Lateral Flow Immunoassay Membrane total production value, 2021-2032, (USD Million)

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

Global Lateral Flow Immunoassay Membrane consumption by region & country, CAGR, 2021-2032 & (M Tests)

U.S. VS China: Lateral Flow Immunoassay Membrane domestic production, consumption, key domestic manufacturers and share

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

Global Lateral Flow Immunoassay Membrane production by Type, production, value, CAGR, 2021-2032, (USD Million) & (M Tests)

Global Lateral Flow Immunoassay Membrane production by Application, production, value, CAGR, 2021-2032, (USD Million) & (M Tests)

This report profiles key players in the global Lateral Flow Immunoassay 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 Lateral Flow Immunoassay 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 Lateral Flow Immunoassay Membrane Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Lateral Flow Immunoassay Membrane Market, Segmentation by Type:

Thickness max. 250 μ m

Thickness above 250 μ m

Global Lateral Flow Immunoassay Membrane Market, Segmentation by Material:

Polyester-backed NC

Unbacked Nitrocellulose (NC)

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

Standard-Flow (Medium): 100-140s/4cm

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

Global Lateral Flow Immunoassay 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 Lateral Flow Immunoassay Membrane market?
2. What is the demand of the global Lateral Flow Immunoassay Membrane market?
3. What is the year over year growth of the global Lateral Flow Immunoassay Membrane market?
4. What is the production and production value of the global Lateral Flow Immunoassay Membrane market?

5. Who are the key producers in the global Lateral Flow Immunoassay Membrane market?
6. What are the growth factors driving the market demand?

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