

Global Lateral Flow Immunoassay Membrane Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/GF316BD06B31EN.html>

Date: February 2026

Pages: 112

Price: US\$ 3,480.00 (Single User License)

ID: GF316BD06B31EN

Abstracts

According to our (Global Info Research) latest study, the global Lateral Flow Immunoassay 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.

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

immunoassay (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 is a detailed and comprehensive analysis for global Lateral Flow Immunoassay 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 Lateral Flow Immunoassay Membrane market size and forecasts, in consumption value (\$ Million), sales quantity (M Tests), and average selling prices (US\$/K Tests), 2021-2032

Global Lateral Flow Immunoassay 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 Lateral Flow Immunoassay 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 Lateral Flow Immunoassay 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 Lateral Flow Immunoassay 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 Lateral Flow Immunoassay 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

Lateral Flow Immunoassay 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 ?m

Thickness above 250 ?m

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 Lateral Flow Immunoassay Membrane product scope, market overview, market estimation caveats and base year.

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

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

Chapter 4, the Lateral Flow Immunoassay 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 Lateral Flow Immunoassay 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 Lateral Flow Immunoassay Membrane.

Chapter 14 and 15, to describe Lateral Flow Immunoassay Membrane sales channel, distributors, customers, research findings and conclusion.

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