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

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Abstracts

The global Nitrocellulose Membrane for Lateral Flow 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).

Nitrocellulose Membrane for Lateral Flow 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 possesses 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, generating 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 protein transfer (Western blotting).

In 2025, the global gross profit margin for Nitrocellulose Membrane for Lateral Flow 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

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square meters per year. This report calculates usage based on 'test counts,' and the global production of Nitrocellulose Membrane for Lateral Flow 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 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. Nitrocellulose Membrane for Lateral Flow can be categorized into two types: those with a thickness of no more than 250 micrometers and those with a thickness greater than 250 micrometers. Membranes with a thickness of no more than 250 micrometers were used in both 2024 and 2025. By 2025, 250 μm lateral flow immunoassay membranes will account for 89.3% of the global sales market share.
3. Nitrocellulose Membrane for Lateral Flow has a wide range of applications. This report categorizes it into medical diagnostics and point-of-care testing (POC), substance abuse testing, food safety and the environment, and other applications. Medical diagnostics and point-of-care testing (POC) is the most widely used 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 consistently been the largest market for Nitrocellulose Membrane for Lateral Flow globally in recent years and is expected to continue growing in the coming years. By 2024, the Asia-Pacific region is projected to account for approximately 41.54% of the global market share, while Europe and North America are expected to account for approximately 27.63% and 23.83%, respectively.
6. Merck, Sartorius, Danaher (Cytiva), AMD (MDI), and Tianren are the major manufacturers in the global Nitrocellulose Membrane for Lateral Flow (LFA) 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, 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

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blockbuster products; therefore, the continuity of NC membrane supply and batch-to-batch consistency will receive greater attention.

Expansion of Home Testing and Retail Channels, Intensified Price Competition: Home testing remains the primary driver of demand for 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, human chorionic gonadotropin (HCG) testing is the largest application area in the market post-pandemic. As this 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 treatments, 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) represents a significant advancement in rapid diagnostics. This raises the bar for membrane requirements, including uniform surface chemistry/porosity, clean and consistent multi-band performance, lower background, and stable lateral flow characteristics—which typically leads to a more segmented membrane portfolio (offering multiple SKUs based on capillary rate/pore structure/surfactant system).

High-throughput, automated, and standardized membranes: Demand for lateral flow immunochromatography (LFA) membranes is expected to continue growing, particularly for high-throughput, automated, and standardized membranes, driven by multiplexing, digital readouts, point-of-care testing (POCT), and their wider applications 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 Nitrocellulose Membrane for Lateral Flow production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Nitrocellulose Membrane for Lateral Flow total production and demand, 2021-2032, (M Tests)
Global Nitrocellulose Membrane for Lateral Flow total production value, 2021-2032, (USD Million)
Global Nitrocellulose Membrane for Lateral Flow production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (M Tests), (based on production site)
Global Nitrocellulose Membrane for Lateral Flow consumption by region & country, CAGR, 2021-2032 & (M Tests)
U.S. VS China: Nitrocellulose Membrane for Lateral Flow domestic production, consumption, key domestic manufacturers and share
Global Nitrocellulose Membrane for Lateral Flow production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (M Tests)
Global Nitrocellulose Membrane for Lateral Flow production by Type, production, value, CAGR, 2021-2032, (USD Million) & (M Tests)
Global Nitrocellulose Membrane for Lateral Flow production by Application, production, value, CAGR, 2021-2032, (USD Million) & (M Tests)

This report profiles key players in the global Nitrocellulose Membrane for Lateral Flow 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 Nitrocellulose Membrane for Lateral Flow market

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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 Nitrocellulose Membrane for Lateral Flow Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Nitrocellulose Membrane for Lateral Flow Market, Segmentation by Type:

Thickness max. 250 µm

Thickness above 250 µm

Global Nitrocellulose Membrane for Lateral Flow Market, Segmentation by Material:

Polyester-backed NC

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Unbacked Nitrocellulose (NC)

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

Standard-Flow (Medium): 100–140s/4cm

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

Global Nitrocellulose Membrane for Lateral Flow 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

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BSK Basic

Beijia New Material

Kingfa

Cobetter

Key Questions Answered:

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

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info@marketpublishers.com

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