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Global Nitrocellulose Membranes Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Nitrocellulose Membranes market size is expected to reach $ 182 million by 2032, rising at a market growth of 1.4% CAGR during the forecast period (2026-2032).

In 2025, the global production of nitrocellulose membranes reached 2.3961 million square meters, with an average selling price of US$67.25 per square meter.

To address the problems of low biomolecule adsorption efficiency, insufficient detection sensitivity, and poor reaction stability in traditional detection media, nitrocellulose membranes (NC membranes) were developed. This product is a porous membrane material made from cellulose as a base material, modified through a nitration reaction in a nitric acid-sulfuric acid mixed system. The core principle is to utilize the synergistic effect of the hydrophobic framework and hydrophilic groups formed after nitration modification to achieve efficient adsorption and immobilization of biomolecules such as proteins and nucleic acids. Simultaneously, the precisely controlled pore structure ensures rapid capillary flow of the detection sample within the membrane, providing a stable carrier platform for biochemical reactions such as immunochromatography and nucleic acid hybridization. Experimental data shows that high-quality NC membranes can adsorb 80-120 ?g/cm? of biomolecules, increasing detection sensitivity by 3-5 times in lateral flow detection scenarios. Since its commercialization in the mid-20th century, NC membranes, with their excellent biocompatibility and detection adaptability, have evolved from a laboratory-specific material to an indispensable core consumable in fields such as in vitro diagnostics and food safety testing.

In 2025, nitrocellulose membranes specifically designed for lateral flow assays will account for over 85% of the global nitrocellulose membrane market. In terms of pricing, significant differences exist due to variations in pore size accuracy, flow rate stability,

and biocompatibility: general-purpose NC membranes, suitable for conventional rapid testing products, have an average price of approximately $44-59 per square meter; high-end precision membranes, suitable for advanced applications such as COVID-19 nucleic acid testing and tumor marker detection, can reach an average price of $62-95 per square meter. Regarding production capacity, a single production line has an annual capacity of approximately 100,000 square meters, with an average industry capacity utilization rate of about 92%. The gross profit margin for high-end products can reach 28%-32%, while that for general-purpose products is approximately 18%-25%.

Typical Transaction Case

In the first quarter of 2025, a leading global in-vitro diagnostic company purchased nitrocellulose membranes from Merck Group (Germany), specifically the HiFlow Plus series. The total purchase volume was 350,000 square meters, with a contract value of approximately $7.8 million. The technical requirements included: ####The product must be compatible with COVID-19 antigen test kits, with a pore size of 80nm and a capillary flow time (4cm distance) of 3-5 minutes; protein adsorption capacity ?100?g/cm?, background signal value ?500 RFU; temperature resistance range of -20? to 50?, with performance degradation ?5% after 18 months of storage at 40%-80% humidity; the product must be certified under the ISO 13485 medical device quality management system, with a batch pass rate ?99.8%, and compatible with high-speed automated reagent kit production lines.####

Industry Pain Points

The fundamental pain point of the nitrocellulose membrane industry lies in the multiple contradictions arising from the product's nature as a core consumable, the high-precision testing requirements of the in-vitro diagnostic industry, the upgrading of global regulatory standards, and the oligopolistic market structure. The core pain points are specifically manifested as follows:

On the product side, core technological barriers are concentrated in the high-end product sector. Key technologies such as pore size uniformity control of precision NC membranes, surface modification technology, and high-stability nitration processes are dominated by a few overseas companies. Domestic companies lag behind in the performance stability of high-end products (for example, under the same testing conditions, the batch-to-batch flow rate difference of domestic general-purpose NC membranes is 15%-22% higher than that of Merck HiFlow Plus series); at the same time, some small and medium-sized manufacturers suffer from product formula

homogenization, resulting in brittle and easily curled membranes, which have defects in adaptability to automated production lines and are prone to false positives and result deviations, thus lowering the overall industry reputation and limiting penetration into the high-end in-vitro diagnostic field.

On the market and regulatory side, global medical device regulatory standards are continuously upgrading. Institutions such as the US FDA, EU CE, and China NMPA have imposed stringent requirements on the performance consistency and safety of in-vitro diagnostic consumables. Domestic small and medium-sized enterprises, due to a lack of core technologies, find it difficult to meet the performance indicators of high-end testing scenarios, and compliance certification requires significant investment and a long cycle; the market exhibits a typical ####oligopoly#### pattern, with the global high-end NC membrane market mainly occupied by leading companies such as Merck (Germany), Cytiva (USA), and Sartorius (Germany). The domestic market is dominated by companies in the Yangtze River Delta and Pearl River Delta regions, where small and medium-sized manufacturers are trapped in low-price competition. Meanwhile, overseas brands have an absolute advantage in technological accumulation, brand recognition, and customer certification systems, further compressing the profit margins and innovation momentum of domestic companies. Industry Chain Structure

The upstream supply chain of nitrocellulose membranes (NC membranes) encompasses core materials and key technological support: core materials include refined cotton pulp (China and India are the main suppliers, while high-end products rely on imported cotton pulp from the US and Brazil), nitric acid, sulfuric acid (China has sufficient production capacity), surfactants (German and American companies dominate the high-end specialized market), and backing materials (polyester non-woven fabric, PET film, with China and Japan as the main suppliers); key components/additives include crosslinking agents (to improve membrane stability), preservatives (to extend shelf life), and wetting agents (to optimize detection flow rate); technological support involves precision coating technology (high proportion of imported equipment from Germany and Japan, with gradual domestic substitution), pore size control technology (joint R&D by universities and enterprises), biocompatibility modification technology (a key R&D focus for enterprises), and batch consistency testing technology (third-party institutions and enterprise-owned laboratories). Downstream applications are primarily in the in-vitro diagnostics field (accounting for 65%), concentrated in infectious disease, pregnancy, and tumor detection scenarios, benefiting from increased public health investment and the demands of an aging population, with a 25% annual increase in demand for precision NC membranes; food safety testing accounts for 18%, used for pesticide residue, veterinary drug residue, and microbial contamination detection, driven

by increasingly stringent global regulations; livestock testing accounts for 12%, serving livestock disease and feed additive testing, driven by the trend of large-scale farming; other fields account for 5%, including environmental monitoring and scientific research experiments, where niche specialized NC membranes have high added value and significant growth potential. Industry Trends and Challenges

The NC membrane industry is developing in four main directions: high-end and precision manufacturing (the market share of small-pore, low-background products will increase from 22% to 38% by 2030), functional diversification (development of composite membranes with multiple characteristics such as high salt/high temperature resistance), green and low-cost production (application of renewable cotton pulp and optimization of nitration processes to reduce emissions), and accelerated localization (breakthroughs in domestic precision coating/pore size control technology, with the domestic penetration rate of high-end products increasing from 45% to 68% by 2030). In terms of market opportunities, the global in-vitro diagnostic consumables market will reach US$28 billion by 2025 (NC membranes accounting for approximately 3%), with the domestic market reaching US$8.5 billion. Emerging POCT technologies are driving an annual demand gap of 1.2 million square meters, and policy support is accelerating localization. Core challenges include a high dependence on imported high-end technologies/materials (approximately 42%, with gaps in batch consistency/stability), increased regulatory requirements driving up compliance costs and squeezing the survival space of small and medium-sized enterprises, and limited profit margins due to low-price competition in the low-to-medium end market and high-end barriers imposed by overseas brands under oligopolistic conditions.

Demand and Business Opportunity Analysis

NC membrane demand drivers and technological advantages: Driven by global population aging and the need for chronic and infectious disease control, in-vitro diagnostics are upgrading towards high sensitivity, speed, and portability. High-end products require 8-10 times stricter uniformity of NC membrane pore size and background signal compared to conventional products, and precision NC membranes can improve detection sensitivity by 3-5 times; after the COVID-19 pandemic, global public health control has been strengthened, and the average annual demand for NC membranes for infectious disease testing is expected to reach 3.2 million square meters from 2025 to 2030; emerging fields such as POCT, pet medical testing (30% annual growth), and environmental pollutant detection are expanding rapidly, driving incremental market growth. In terms of technical adaptability, leading companies' products cover all application scenarios and are compatible with different biomarkers

and special requirements such as high temperature/high salt/low background conditions (with a compatibility rate of 90%). High-quality NC membranes can reduce false negative/false positive rates in testing, enhancing product competitiveness. Domestic companies have achieved technological breakthroughs, making precision NC membranes 20%-30% cheaper than imported ones, thus reducing downstream costs and accelerating localization. For example, Shanghai Jieyi Biotechnology's winning bid rate in the domestic high-end market is expected to reach 28% in 2025 (an increase of 13 percentage points compared to 2023), and its global market share is gradually increasing to 3.2%.

This report studies the global Nitrocellulose Membranes production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study
Global Nitrocellulose Membranes total production and demand, 2021-2032, (K Sqm)
Global Nitrocellulose Membranes total production value, 2021-2032, (USD Million)
Global Nitrocellulose Membranes production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm), (based on production site)
Global Nitrocellulose Membranes consumption by region & country, CAGR, 2021-2032 & (K Sqm)

U.S. VS China: Nitrocellulose Membranes domestic production, consumption, key domestic manufacturers and share
Global Nitrocellulose Membranes production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Sqm)
Global Nitrocellulose Membranes production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm)
Global Nitrocellulose Membranes production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm)

This report profiles key players in the global Nitrocellulose Membranes 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, Cytiva, Thermo Fisher, Pall Corporation, GVS, Abcam, Santa Cruz Biotechnology, Geno Technology, MDI, 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 Membranes market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (K Sqm) and average price (US$/Sqm) 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 Membranes Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Nitrocellulose Membranes Market, Segmentation by Type:

Small Pore Membrane (oO0.45µm)

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Medium Pore Membrane (0.45-6µm)

Large Pore Membrane (>6µm)

Global Nitrocellulose Membranes Market, Segmentation by Structure:

Unsupported NC Membrane

Supported NC Membrane

Global Nitrocellulose Membranes Market, Segmentation by Performance:

General Purpose NC Membrane

Precision NC Membrane

Specialized NC Membrane

Global Nitrocellulose Membranes Market, Segmentation by Application:

Biopharmaceutical

Food & Beverage

Research Institutes and Academic Center

Other

Companies Profiled:

Merck

Sartorius

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Cytiva

Thermo Fisher

Pall Corporation

GVS

Abcam

Santa Cruz Biotechnology

Geno Technology

MDI

Macherey-Nagel

Bio-Rad

Advansta

Shanghai Jieyi Biotechnology

Shanghai Jinbiao Biotechnology

Key Questions Answered:

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

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