

Global Nitrocellulose (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 Nitrocellulose (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.

In this report, Nitrocellulose (NC) membrane primarily refers to analytical/reaction membranes, typically nitrocellulose (NC) membranes laminated onto a backing. These porous, capillary-driven substrate materials are used in lateral flow test strips, enabling liquid transport and immunoreaction on the strip. NC exhibits strong capillary action and high protein binding capacity, allowing for the capture and immobilization of biological reagents 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.

In 2025, the global Nitrocellulose (NC) membrane industry's gross profit margin was approximately 44.36%-59.54%. Depending on the product's form, some companies use 'rolls' (100 meters/roll) as the unit of measurement; others use 'sheets' or 'square meters' (1 square meter/sheet). Prices vary depending on product specifications. Retail prices range from approximately \$100 to \$285 per roll, with leading international companies generally charging higher prices than Chinese manufacturers. Production capacity varies among companies; some small businesses have only one production line, producing 3,000 rolls per month, while others produce approximately 300,000 square meters annually. This report calculates usage based on 'test counts,' projecting global Nitrocellulose (NC) Membrane production to reach 9,556 million tests by 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 product 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 have applications in both 2024 and 2025. In 2025, 250 µm NC 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), drug 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 NC membrane market. The top five manufacturers are projected to account for approximately 80.15% of the global market share by 2025.

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, drug 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, human chorionic gonadotropin (HCG) testing is the largest application area in the market post-pandemic. As this area is quite mature, companies are competing by reducing 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 emphasizing balancing speed and performance through capillary action time (slower capillary action times generally improve sensitivity), pore structure, and surfactant treatments, making membrane screening a critical 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 membranes, requiring uniform surface chemistry/porosity, clean and consistent multi-strip performance, lower background, and stable lateral flow characteristics—often leading 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 Nitrocellulose (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 Nitrocellulose (NC) Membrane market size and forecasts, in consumption value (\$ Million), sales quantity (M Tests), and average selling prices (US\$/K Tests), 2021-2032

Global Nitrocellulose (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 Nitrocellulose (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 Nitrocellulose (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 Nitrocellulose (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 Nitrocellulose (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

Nitrocellulose (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 μ m

Thickness above 250 μ 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:

Global Nitrocellulose (NC) Membrane Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2...

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

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

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

Chapter 4, the Nitrocellulose (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 Nitrocellulose (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 Nitrocellulose (NC) Membrane.

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

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