

Global Lateral Flow 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 Lateral Flow 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 Membrane 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 Western blotting.

In 2025, the global gross profit margin for Lateral Flow Membrane companies 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 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 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. 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 be used in both 2024 and 2025. In 2025, 250 µm lateral flow immunoassay 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), substance 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 Lateral Flow Membrane 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, lateral flow immunoassay (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 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, post-pandemic, human chorionic gonadotropin (HCG) testing is the largest application area in the market. As the 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 treatment, 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) is a significant advancement in rapid diagnostics. This raises the requirements for membranes, including uniform surface chemistry/porosity, clean and consistent multi-strip performance, lower background, and stable lateral flow characteristics—which often leads 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 Lateral Flow 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 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 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 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 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 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 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 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 μm

Thickness above 250 μm

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

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

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

Chapter 4, the Lateral Flow 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 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 Membrane.

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

Contents

1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Market Analysis by Type

1.3.1 Overview: Global Lateral Flow Membrane Consumption Value by Type: 2021 Versus 2025 Versus 2032

1.3.2 Thickness max. 250 µm

1.3.3 Thickness above 250 µm

1.4 Market Analysis by Material

1.4.1 Overview: Global Lateral Flow Membrane Consumption Value by Material: 2021 Versus 2025 Versus 2032

1.4.2 Polyester-backed NC

1.4.3 Unbacked Nitrocellulose (NC)

1.5 Market Analysis by Wicking Rate (s/4 cm)

1.5.1 Overview: Global Lateral Flow Membrane Consumption Value by Wicking Rate (s/4 cm): 2021 Versus 2025 Versus 2032

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

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

1.6 Market Analysis by Application

1.6.1 Overview: Global Lateral Flow Membrane Consumption Value by Application: 2021 Versus 2025 Versus 2032

1.6.2 Medical Diagnostics and Point-of-Care (POC)

1.6.3 Drug of Abuse Testing

1.6.4 Food Safety and Environmental

1.6.5 Other Applications

1.7 Global Lateral Flow Membrane Market Size & Forecast

1.7.1 Global Lateral Flow Membrane Consumption Value (2021 & 2025 & 2032)

1.7.2 Global Lateral Flow Membrane Sales Quantity (2021-2032)

1.7.3 Global Lateral Flow Membrane Average Price (2021-2032)

2 MANUFACTURERS PROFILES

2.1 Merck

2.1.1 Merck Details

2.1.2 Merck Major Business

2.1.3 Merck Lateral Flow Membrane Product and Services

2.1.4 Merck Lateral Flow Membrane Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.1.5 Merck Recent Developments/Updates

2.2 Sartorius

2.2.1 Sartorius Details

2.2.2 Sartorius Major Business

2.2.3 Sartorius Lateral Flow Membrane Product and Services

2.2.4 Sartorius Lateral Flow Membrane Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.2.5 Sartorius Recent Developments/Updates

2.3 Danaher (Cytiva)

2.3.1 Danaher (Cytiva) Details

2.3.2 Danaher (Cytiva) Major Business

2.3.3 Danaher (Cytiva) Lateral Flow Membrane Product and Services

2.3.4 Danaher (Cytiva) Lateral Flow Membrane Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.3.5 Danaher (Cytiva) Recent Developments/Updates

2.4 Advantec

2.4.1 Advantec Details

2.4.2 Advantec Major Business

2.4.3 Advantec Lateral Flow Membrane Product and Services

2.4.4 Advantec Lateral Flow Membrane Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.4.5 Advantec Recent Developments/Updates

2.5 Advanced Microdevices (MDI)

2.5.1 Advanced Microdevices (MDI) Details

2.5.2 Advanced Microdevices (MDI) Major Business

2.5.3 Advanced Microdevices (MDI) Lateral Flow Membrane Product and Services

2.5.4 Advanced Microdevices (MDI) Lateral Flow Membrane Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.5.5 Advanced Microdevices (MDI) Recent Developments/Updates

2.6 Equinox Biotech

2.6.1 Equinox Biotech Details

2.6.2 Equinox Biotech Major Business

2.6.3 Equinox Biotech Lateral Flow Membrane Product and Services

2.6.4 Equinox Biotech Lateral Flow Membrane Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.6.5 Equinox Biotech Recent Developments/Updates

2.7 Tianren

- 2.7.1 Tianren Details
- 2.7.2 Tianren Major Business
- 2.7.3 Tianren Lateral Flow Membrane Product and Services
- 2.7.4 Tianren Lateral Flow Membrane Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.7.5 Tianren Recent Developments/Updates
- 2.8 Zhejiang Tailin Bioengineering
 - 2.8.1 Zhejiang Tailin Bioengineering Details
 - 2.8.2 Zhejiang Tailin Bioengineering Major Business
 - 2.8.3 Zhejiang Tailin Bioengineering Lateral Flow Membrane Product and Services
 - 2.8.4 Zhejiang Tailin Bioengineering Lateral Flow Membrane Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.8.5 Zhejiang Tailin Bioengineering Recent Developments/Updates
- 2.9 BSK Basic
 - 2.9.1 BSK Basic Details
 - 2.9.2 BSK Basic Major Business
 - 2.9.3 BSK Basic Lateral Flow Membrane Product and Services
 - 2.9.4 BSK Basic Lateral Flow Membrane Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.9.5 BSK Basic Recent Developments/Updates
- 2.10 Beijia New Material
 - 2.10.1 Beijia New Material Details
 - 2.10.2 Beijia New Material Major Business
 - 2.10.3 Beijia New Material Lateral Flow Membrane Product and Services
 - 2.10.4 Beijia New Material Lateral Flow Membrane Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.10.5 Beijia New Material Recent Developments/Updates
- 2.11 Kingfa
 - 2.11.1 Kingfa Details
 - 2.11.2 Kingfa Major Business
 - 2.11.3 Kingfa Lateral Flow Membrane Product and Services
 - 2.11.4 Kingfa Lateral Flow Membrane Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.11.5 Kingfa Recent Developments/Updates
- 2.12 Cobetter
 - 2.12.1 Cobetter Details
 - 2.12.2 Cobetter Major Business
 - 2.12.3 Cobetter Lateral Flow Membrane Product and Services
 - 2.12.4 Cobetter Lateral Flow Membrane Sales Quantity, Average Price, Revenue,

Gross Margin and Market Share (2021-2026)

2.12.5 Cobetter Recent Developments/Updates

3 COMPETITIVE ENVIRONMENT: LATERAL FLOW MEMBRANE BY MANUFACTURER

3.1 Global Lateral Flow Membrane Sales Quantity by Manufacturer (2021-2026)

3.2 Global Lateral Flow Membrane Revenue by Manufacturer (2021-2026)

3.3 Global Lateral Flow Membrane Average Price by Manufacturer (2021-2026)

3.4 Market Share Analysis (2025)

3.4.1 Producer Shipments of Lateral Flow Membrane by Manufacturer Revenue (\$MM) and Market Share (%): 2025

3.4.2 Top 3 Lateral Flow Membrane Manufacturer Market Share in 2025

3.4.3 Top 6 Lateral Flow Membrane Manufacturer Market Share in 2025

3.5 Lateral Flow Membrane Market: Overall Company Footprint Analysis

3.5.1 Lateral Flow Membrane Market: Region Footprint

3.5.2 Lateral Flow Membrane Market: Company Product Type Footprint

3.5.3 Lateral Flow Membrane Market: Company Product Application Footprint

3.6 New Market Entrants and Barriers to Market Entry

3.7 Mergers, Acquisition, Agreements, and Collaborations

4 CONSUMPTION ANALYSIS BY REGION

4.1 Global Lateral Flow Membrane Market Size by Region

4.1.1 Global Lateral Flow Membrane Sales Quantity by Region (2021-2032)

4.1.2 Global Lateral Flow Membrane Consumption Value by Region (2021-2032)

4.1.3 Global Lateral Flow Membrane Average Price by Region (2021-2032)

4.2 North America Lateral Flow Membrane Consumption Value (2021-2032)

4.3 Europe Lateral Flow Membrane Consumption Value (2021-2032)

4.4 Asia-Pacific Lateral Flow Membrane Consumption Value (2021-2032)

4.5 South America Lateral Flow Membrane Consumption Value (2021-2032)

4.6 Middle East & Africa Lateral Flow Membrane Consumption Value (2021-2032)

5 MARKET SEGMENT BY TYPE

5.1 Global Lateral Flow Membrane Sales Quantity by Type (2021-2032)

5.2 Global Lateral Flow Membrane Consumption Value by Type (2021-2032)

5.3 Global Lateral Flow Membrane Average Price by Type (2021-2032)

6 MARKET SEGMENT BY APPLICATION

- 6.1 Global Lateral Flow Membrane Sales Quantity by Application (2021-2032)
- 6.2 Global Lateral Flow Membrane Consumption Value by Application (2021-2032)
- 6.3 Global Lateral Flow Membrane Average Price by Application (2021-2032)

7 NORTH AMERICA

- 7.1 North America Lateral Flow Membrane Sales Quantity by Type (2021-2032)
- 7.2 North America Lateral Flow Membrane Sales Quantity by Application (2021-2032)
- 7.3 North America Lateral Flow Membrane Market Size by Country
 - 7.3.1 North America Lateral Flow Membrane Sales Quantity by Country (2021-2032)
 - 7.3.2 North America Lateral Flow Membrane Consumption Value by Country (2021-2032)
 - 7.3.3 United States Market Size and Forecast (2021-2032)
 - 7.3.4 Canada Market Size and Forecast (2021-2032)
 - 7.3.5 Mexico Market Size and Forecast (2021-2032)

8 EUROPE

- 8.1 Europe Lateral Flow Membrane Sales Quantity by Type (2021-2032)
- 8.2 Europe Lateral Flow Membrane Sales Quantity by Application (2021-2032)
- 8.3 Europe Lateral Flow Membrane Market Size by Country
 - 8.3.1 Europe Lateral Flow Membrane Sales Quantity by Country (2021-2032)
 - 8.3.2 Europe Lateral Flow Membrane Consumption Value by Country (2021-2032)
 - 8.3.3 Germany Market Size and Forecast (2021-2032)
 - 8.3.4 France Market Size and Forecast (2021-2032)
 - 8.3.5 United Kingdom Market Size and Forecast (2021-2032)
 - 8.3.6 Russia Market Size and Forecast (2021-2032)
 - 8.3.7 Italy Market Size and Forecast (2021-2032)

9 ASIA-PACIFIC

- 9.1 Asia-Pacific Lateral Flow Membrane Sales Quantity by Type (2021-2032)
- 9.2 Asia-Pacific Lateral Flow Membrane Sales Quantity by Application (2021-2032)
- 9.3 Asia-Pacific Lateral Flow Membrane Market Size by Region
 - 9.3.1 Asia-Pacific Lateral Flow Membrane Sales Quantity by Region (2021-2032)
 - 9.3.2 Asia-Pacific Lateral Flow Membrane Consumption Value by Region (2021-2032)
 - 9.3.3 China Market Size and Forecast (2021-2032)

- 9.3.4 Japan Market Size and Forecast (2021-2032)
- 9.3.5 South Korea Market Size and Forecast (2021-2032)
- 9.3.6 India Market Size and Forecast (2021-2032)
- 9.3.7 Southeast Asia Market Size and Forecast (2021-2032)
- 9.3.8 Australia Market Size and Forecast (2021-2032)

10 SOUTH AMERICA

- 10.1 South America Lateral Flow Membrane Sales Quantity by Type (2021-2032)
- 10.2 South America Lateral Flow Membrane Sales Quantity by Application (2021-2032)
- 10.3 South America Lateral Flow Membrane Market Size by Country
 - 10.3.1 South America Lateral Flow Membrane Sales Quantity by Country (2021-2032)
 - 10.3.2 South America Lateral Flow Membrane Consumption Value by Country (2021-2032)
 - 10.3.3 Brazil Market Size and Forecast (2021-2032)
 - 10.3.4 Argentina Market Size and Forecast (2021-2032)

11 MIDDLE EAST & AFRICA

- 11.1 Middle East & Africa Lateral Flow Membrane Sales Quantity by Type (2021-2032)
- 11.2 Middle East & Africa Lateral Flow Membrane Sales Quantity by Application (2021-2032)
- 11.3 Middle East & Africa Lateral Flow Membrane Market Size by Country
 - 11.3.1 Middle East & Africa Lateral Flow Membrane Sales Quantity by Country (2021-2032)
 - 11.3.2 Middle East & Africa Lateral Flow Membrane Consumption Value by Country (2021-2032)
 - 11.3.3 Turkey Market Size and Forecast (2021-2032)
 - 11.3.4 Egypt Market Size and Forecast (2021-2032)
 - 11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)
 - 11.3.6 South Africa Market Size and Forecast (2021-2032)

12 MARKET DYNAMICS

- 12.1 Lateral Flow Membrane Market Drivers
- 12.2 Lateral Flow Membrane Market Restraints
- 12.3 Lateral Flow Membrane Trends Analysis
- 12.4 Porters Five Forces Analysis
 - 12.4.1 Threat of New Entrants

- 12.4.2 Bargaining Power of Suppliers
- 12.4.3 Bargaining Power of Buyers
- 12.4.4 Threat of Substitutes
- 12.4.5 Competitive Rivalry

13 RAW MATERIAL AND INDUSTRY CHAIN

- 13.1 Raw Material of Lateral Flow Membrane and Key Manufacturers
- 13.2 Manufacturing Costs Percentage of Lateral Flow Membrane
- 13.3 Lateral Flow Membrane Production Process
- 13.4 Industry Value Chain Analysis

14 SHIPMENTS BY DISTRIBUTION CHANNEL

- 14.1 Sales Channel
 - 14.1.1 Direct to End-User
 - 14.1.2 Distributors
- 14.2 Lateral Flow Membrane Typical Distributors
- 14.3 Lateral Flow Membrane Typical Customers

15 RESEARCH FINDINGS AND CONCLUSION

16 APPENDIX

- 16.1 Methodology
- 16.2 Research Process and Data Source
- 16.3 Disclaimer

List Of Tables

LIST OF TABLES

- Table 1. Global Lateral Flow Membrane Consumption Value by Type, (USD Million), 2021 & 2025 & 2032
- Table 2. Global Lateral Flow Membrane Consumption Value by Material, (USD Million), 2021 & 2025 & 2032
- Table 3. Global Lateral Flow Membrane Consumption Value by Wicking Rate (s/4 cm), (USD Million), 2021 & 2025 & 2032
- Table 4. Global Lateral Flow Membrane Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
- Table 5. Merck Basic Information, Manufacturing Base and Competitors
- Table 6. Merck Major Business
- Table 7. Merck Lateral Flow Membrane Product and Services
- Table 8. Merck Lateral Flow Membrane Sales Quantity (M Tests), Average Price (US\$/K Tests), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 9. Merck Recent Developments/Updates
- Table 10. Sartorius Basic Information, Manufacturing Base and Competitors
- Table 11. Sartorius Major Business
- Table 12. Sartorius Lateral Flow Membrane Product and Services
- Table 13. Sartorius Lateral Flow Membrane Sales Quantity (M Tests), Average Price (US\$/K Tests), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 14. Sartorius Recent Developments/Updates
- Table 15. Danaher (Cytiva) Basic Information, Manufacturing Base and Competitors
- Table 16. Danaher (Cytiva) Major Business
- Table 17. Danaher (Cytiva) Lateral Flow Membrane Product and Services
- Table 18. Danaher (Cytiva) Lateral Flow Membrane Sales Quantity (M Tests), Average Price (US\$/K Tests), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 19. Danaher (Cytiva) Recent Developments/Updates
- Table 20. Advantec Basic Information, Manufacturing Base and Competitors
- Table 21. Advantec Major Business
- Table 22. Advantec Lateral Flow Membrane Product and Services
- Table 23. Advantec Lateral Flow Membrane Sales Quantity (M Tests), Average Price (US\$/K Tests), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 24. Advantec Recent Developments/Updates
- Table 25. Advanced Microdevices (MDI) Basic Information, Manufacturing Base and Competitors

- Table 26. Advanced Microdevices (MDI) Major Business
- Table 27. Advanced Microdevices (MDI) Lateral Flow Membrane Product and Services
- Table 28. Advanced Microdevices (MDI) Lateral Flow Membrane Sales Quantity (M Tests), Average Price (US\$/K Tests), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 29. Advanced Microdevices (MDI) Recent Developments/Updates
- Table 30. Equinox Biotech Basic Information, Manufacturing Base and Competitors
- Table 31. Equinox Biotech Major Business
- Table 32. Equinox Biotech Lateral Flow Membrane Product and Services
- Table 33. Equinox Biotech Lateral Flow Membrane Sales Quantity (M Tests), Average Price (US\$/K Tests), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 34. Equinox Biotech Recent Developments/Updates
- Table 35. Tianren Basic Information, Manufacturing Base and Competitors
- Table 36. Tianren Major Business
- Table 37. Tianren Lateral Flow Membrane Product and Services
- Table 38. Tianren Lateral Flow Membrane Sales Quantity (M Tests), Average Price (US\$/K Tests), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 39. Tianren Recent Developments/Updates
- Table 40. Zhejiang Tailin Bioengineering Basic Information, Manufacturing Base and Competitors
- Table 41. Zhejiang Tailin Bioengineering Major Business
- Table 42. Zhejiang Tailin Bioengineering Lateral Flow Membrane Product and Services
- Table 43. Zhejiang Tailin Bioengineering Lateral Flow Membrane Sales Quantity (M Tests), Average Price (US\$/K Tests), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 44. Zhejiang Tailin Bioengineering Recent Developments/Updates
- Table 45. BSK Basic Basic Information, Manufacturing Base and Competitors
- Table 46. BSK Basic Major Business
- Table 47. BSK Basic Lateral Flow Membrane Product and Services
- Table 48. BSK Basic Lateral Flow Membrane Sales Quantity (M Tests), Average Price (US\$/K Tests), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 49. BSK Basic Recent Developments/Updates
- Table 50. Beijia New Material Basic Information, Manufacturing Base and Competitors
- Table 51. Beijia New Material Major Business
- Table 52. Beijia New Material Lateral Flow Membrane Product and Services
- Table 53. Beijia New Material Lateral Flow Membrane Sales Quantity (M Tests), Average Price (US\$/K Tests), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

- Table 54. Beijia New Material Recent Developments/Updates
- Table 55. Kingfa Basic Information, Manufacturing Base and Competitors
- Table 56. Kingfa Major Business
- Table 57. Kingfa Lateral Flow Membrane Product and Services
- Table 58. Kingfa Lateral Flow Membrane Sales Quantity (M Tests), Average Price (US\$/K Tests), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 59. Kingfa Recent Developments/Updates
- Table 60. Cobetter Basic Information, Manufacturing Base and Competitors
- Table 61. Cobetter Major Business
- Table 62. Cobetter Lateral Flow Membrane Product and Services
- Table 63. Cobetter Lateral Flow Membrane Sales Quantity (M Tests), Average Price (US\$/K Tests), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 64. Cobetter Recent Developments/Updates
- Table 65. Global Lateral Flow Membrane Sales Quantity by Manufacturer (2021-2026) & (M Tests)
- Table 66. Global Lateral Flow Membrane Revenue by Manufacturer (2021-2026) & (USD Million)
- Table 67. Global Lateral Flow Membrane Average Price by Manufacturer (2021-2026) & (US\$/K Tests)
- Table 68. Market Position of Manufacturers in Lateral Flow Membrane, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025
- Table 69. Head Office and Lateral Flow Membrane Production Site of Key Manufacturer
- Table 70. Lateral Flow Membrane Market: Company Product Type Footprint
- Table 71. Lateral Flow Membrane Market: Company Product Application Footprint
- Table 72. Lateral Flow Membrane New Market Entrants and Barriers to Market Entry
- Table 73. Lateral Flow Membrane Mergers, Acquisition, Agreements, and Collaborations
- Table 74. Global Lateral Flow Membrane Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR
- Table 75. Global Lateral Flow Membrane Sales Quantity by Region (2021-2026) & (M Tests)
- Table 76. Global Lateral Flow Membrane Sales Quantity by Region (2027-2032) & (M Tests)
- Table 77. Global Lateral Flow Membrane Consumption Value by Region (2021-2026) & (USD Million)
- Table 78. Global Lateral Flow Membrane Consumption Value by Region (2027-2032) & (USD Million)
- Table 79. Global Lateral Flow Membrane Average Price by Region (2021-2026) & (US\$/K Tests)

Table 80. Global Lateral Flow Membrane Average Price by Region (2027-2032) & (US\$/K Tests)

Table 81. Global Lateral Flow Membrane Sales Quantity by Type (2021-2026) & (M Tests)

Table 82. Global Lateral Flow Membrane Sales Quantity by Type (2027-2032) & (M Tests)

Table 83. Global Lateral Flow Membrane Consumption Value by Type (2021-2026) & (USD Million)

Table 84. Global Lateral Flow Membrane Consumption Value by Type (2027-2032) & (USD Million)

Table 85. Global Lateral Flow Membrane Average Price by Type (2021-2026) & (US\$/K Tests)

Table 86. Global Lateral Flow Membrane Average Price by Type (2027-2032) & (US\$/K Tests)

Table 87. Global Lateral Flow Membrane Sales Quantity by Application (2021-2026) & (M Tests)

Table 88. Global Lateral Flow Membrane Sales Quantity by Application (2027-2032) & (M Tests)

Table 89. Global Lateral Flow Membrane Consumption Value by Application (2021-2026) & (USD Million)

Table 90. Global Lateral Flow Membrane Consumption Value by Application (2027-2032) & (USD Million)

Table 91. Global Lateral Flow Membrane Average Price by Application (2021-2026) & (US\$/K Tests)

Table 92. Global Lateral Flow Membrane Average Price by Application (2027-2032) & (US\$/K Tests)

Table 93. North America Lateral Flow Membrane Sales Quantity by Type (2021-2026) & (M Tests)

Table 94. North America Lateral Flow Membrane Sales Quantity by Type (2027-2032) & (M Tests)

Table 95. North America Lateral Flow Membrane Sales Quantity by Application (2021-2026) & (M Tests)

Table 96. North America Lateral Flow Membrane Sales Quantity by Application (2027-2032) & (M Tests)

Table 97. North America Lateral Flow Membrane Sales Quantity by Country (2021-2026) & (M Tests)

Table 98. North America Lateral Flow Membrane Sales Quantity by Country (2027-2032) & (M Tests)

Table 99. North America Lateral Flow Membrane Consumption Value by Country

(2021-2026) & (USD Million)

Table 100. North America Lateral Flow Membrane Consumption Value by Country

(2027-2032) & (USD Million)

Table 101. Europe Lateral Flow Membrane Sales Quantity by Type (2021-2026) & (M Tests)

Table 102. Europe Lateral Flow Membrane Sales Quantity by Type (2027-2032) & (M Tests)

Table 103. Europe Lateral Flow Membrane Sales Quantity by Application (2021-2026) & (M Tests)

Table 104. Europe Lateral Flow Membrane Sales Quantity by Application (2027-2032) & (M Tests)

Table 105. Europe Lateral Flow Membrane Sales Quantity by Country (2021-2026) & (M Tests)

Table 106. Europe Lateral Flow Membrane Sales Quantity by Country (2027-2032) & (M Tests)

Table 107. Europe Lateral Flow Membrane Consumption Value by Country (2021-2026) & (USD Million)

Table 108. Europe Lateral Flow Membrane Consumption Value by Country (2027-2032) & (USD Million)

Table 109. Asia-Pacific Lateral Flow Membrane Sales Quantity by Type (2021-2026) & (M Tests)

Table 110. Asia-Pacific Lateral Flow Membrane Sales Quantity by Type (2027-2032) & (M Tests)

Table 111. Asia-Pacific Lateral Flow Membrane Sales Quantity by Application (2021-2026) & (M Tests)

Table 112. Asia-Pacific Lateral Flow Membrane Sales Quantity by Application (2027-2032) & (M Tests)

Table 113. Asia-Pacific Lateral Flow Membrane Sales Quantity by Region (2021-2026) & (M Tests)

Table 114. Asia-Pacific Lateral Flow Membrane Sales Quantity by Region (2027-2032) & (M Tests)

Table 115. Asia-Pacific Lateral Flow Membrane Consumption Value by Region (2021-2026) & (USD Million)

Table 116. Asia-Pacific Lateral Flow Membrane Consumption Value by Region (2027-2032) & (USD Million)

Table 117. South America Lateral Flow Membrane Sales Quantity by Type (2021-2026) & (M Tests)

Table 118. South America Lateral Flow Membrane Sales Quantity by Type (2027-2032) & (M Tests)

Table 119. South America Lateral Flow Membrane Sales Quantity by Application (2021-2026) & (M Tests)

Table 120. South America Lateral Flow Membrane Sales Quantity by Application (2027-2032) & (M Tests)

Table 121. South America Lateral Flow Membrane Sales Quantity by Country (2021-2026) & (M Tests)

Table 122. South America Lateral Flow Membrane Sales Quantity by Country (2027-2032) & (M Tests)

Table 123. South America Lateral Flow Membrane Consumption Value by Country (2021-2026) & (USD Million)

Table 124. South America Lateral Flow Membrane Consumption Value by Country (2027-2032) & (USD Million)

Table 125. Middle East & Africa Lateral Flow Membrane Sales Quantity by Type (2021-2026) & (M Tests)

Table 126. Middle East & Africa Lateral Flow Membrane Sales Quantity by Type (2027-2032) & (M Tests)

Table 127. Middle East & Africa Lateral Flow Membrane Sales Quantity by Application (2021-2026) & (M Tests)

Table 128. Middle East & Africa Lateral Flow Membrane Sales Quantity by Application (2027-2032) & (M Tests)

Table 129. Middle East & Africa Lateral Flow Membrane Sales Quantity by Country (2021-2026) & (M Tests)

Table 130. Middle East & Africa Lateral Flow Membrane Sales Quantity by Country (2027-2032) & (M Tests)

Table 131. Middle East & Africa Lateral Flow Membrane Consumption Value by Country (2021-2026) & (USD Million)

Table 132. Middle East & Africa Lateral Flow Membrane Consumption Value by Country (2027-2032) & (USD Million)

Table 133. Lateral Flow Membrane Raw Material

Table 134. Key Manufacturers of Lateral Flow Membrane Raw Materials

Table 135. Lateral Flow Membrane Typical Distributors

Table 136. Lateral Flow Membrane Typical Customers

List Of Figures

LIST OF FIGURES

Figure 1. Lateral Flow Membrane Picture

Figure 2. Global Lateral Flow Membrane Revenue by Type, (USD Million), 2021 & 2025 & 2032

Figure 3. Global Lateral Flow Membrane Revenue Market Share by Type in 2025

Figure 4. Thickness max. 250 µm Examples

Figure 5. Thickness above 250 µm Examples

Figure 6. Global Lateral Flow Membrane Revenue by Material, (USD Million), 2021 & 2025 & 2032

Figure 7. Global Lateral Flow Membrane Revenue Market Share by Material in 2025

Figure 8. Polyester?backed NC Examples

Figure 9. Unbacked Nitrocellulose (NC) Examples

Figure 10. Global Lateral Flow Membrane Revenue by Wicking Rate (s/4 cm), (USD Million), 2021 & 2025 & 2032

Figure 11. Global Lateral Flow Membrane Revenue Market Share by Wicking Rate (s/4 cm) in 2025

Figure 12. Standard-Flow (Medium): 100–140s/4cm Examples

Figure 13. High-Flow (Fast): 140s/4cm Examples

Figure 15. Global Lateral Flow Membrane Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 16. Global Lateral Flow Membrane Revenue Market Share by Application in 2025

Figure 17. Medical Diagnostics and Point-of-Care (POC) Examples

Figure 18. Drug of Abuse Testing Examples

Figure 19. Food Safety and Environmental Examples

Figure 20. Other Applications Examples

Figure 21. Global Lateral Flow Membrane Consumption Value, (USD Million): 2021 & 2025 & 2032

Figure 22. Global Lateral Flow Membrane Consumption Value and Forecast (2021-2032) & (USD Million)

Figure 23. Global Lateral Flow Membrane Sales Quantity (2021-2032) & (M Tests)

Figure 24. Global Lateral Flow Membrane Price (2021-2032) & (US\$/K Tests)

Figure 25. Global Lateral Flow Membrane Sales Quantity Market Share by Manufacturer in 2025

Figure 26. Global Lateral Flow Membrane Revenue Market Share by Manufacturer in 2025

Figure 27. Producer Shipments of Lateral Flow Membrane by Manufacturer Sales (\$MM) and Market Share (%): 2025

Figure 28. Top 3 Lateral Flow Membrane Manufacturer (Revenue) Market Share in 2025

Figure 29. Top 6 Lateral Flow Membrane Manufacturer (Revenue) Market Share in 2025

Figure 30. Global Lateral Flow Membrane Sales Quantity Market Share by Region (2021-2032)

Figure 31. Global Lateral Flow Membrane Consumption Value Market Share by Region (2021-2032)

Figure 32. North America Lateral Flow Membrane Consumption Value (2021-2032) & (USD Million)

Figure 33. Europe Lateral Flow Membrane Consumption Value (2021-2032) & (USD Million)

Figure 34. Asia-Pacific Lateral Flow Membrane Consumption Value (2021-2032) & (USD Million)

Figure 35. South America Lateral Flow Membrane Consumption Value (2021-2032) & (USD Million)

Figure 36. Middle East & Africa Lateral Flow Membrane Consumption Value (2021-2032) & (USD Million)

Figure 37. Global Lateral Flow Membrane Sales Quantity Market Share by Type (2021-2032)

Figure 38. Global Lateral Flow Membrane Consumption Value Market Share by Type (2021-2032)

Figure 39. Global Lateral Flow Membrane Average Price by Type (2021-2032) & (US\$/K Tests)

Figure 40. Global Lateral Flow Membrane Sales Quantity Market Share by Application (2021-2032)

Figure 41. Global Lateral Flow Membrane Revenue Market Share by Application (2021-2032)

Figure 42. Global Lateral Flow Membrane Average Price by Application (2021-2032) & (US\$/K Tests)

Figure 43. North America Lateral Flow Membrane Sales Quantity Market Share by Type (2021-2032)

Figure 44. North America Lateral Flow Membrane Sales Quantity Market Share by Application (2021-2032)

Figure 45. North America Lateral Flow Membrane Sales Quantity Market Share by Country (2021-2032)

Figure 46. North America Lateral Flow Membrane Consumption Value Market Share by

Country (2021-2032)

Figure 47. United States Lateral Flow Membrane Consumption Value (2021-2032) & (USD Million)

Figure 48. Canada Lateral Flow Membrane Consumption Value (2021-2032) & (USD Million)

Figure 49. Mexico Lateral Flow Membrane Consumption Value (2021-2032) & (USD Million)

Figure 50. Europe Lateral Flow Membrane Sales Quantity Market Share by Type (2021-2032)

Figure 51. Europe Lateral Flow Membrane Sales Quantity Market Share by Application (2021-2032)

Figure 52. Europe Lateral Flow Membrane Sales Quantity Market Share by Country (2021-2032)

Figure 53. Europe Lateral Flow Membrane Consumption Value Market Share by Country (2021-2032)

Figure 54. Germany Lateral Flow Membrane Consumption Value (2021-2032) & (USD Million)

Figure 55. France Lateral Flow Membrane Consumption Value (2021-2032) & (USD Million)

Figure 56. United Kingdom Lateral Flow Membrane Consumption Value (2021-2032) & (USD Million)

Figure 57. Russia Lateral Flow Membrane Consumption Value (2021-2032) & (USD Million)

Figure 58. Italy Lateral Flow Membrane Consumption Value (2021-2032) & (USD Million)

Figure 59. Asia-Pacific Lateral Flow Membrane Sales Quantity Market Share by Type (2021-2032)

Figure 60. Asia-Pacific Lateral Flow Membrane Sales Quantity Market Share by Application (2021-2032)

Figure 61. Asia-Pacific Lateral Flow Membrane Sales Quantity Market Share by Region (2021-2032)

Figure 62. Asia-Pacific Lateral Flow Membrane Consumption Value Market Share by Region (2021-2032)

Figure 63. China Lateral Flow Membrane Consumption Value (2021-2032) & (USD Million)

Figure 64. Japan Lateral Flow Membrane Consumption Value (2021-2032) & (USD Million)

Figure 65. South Korea Lateral Flow Membrane Consumption Value (2021-2032) & (USD Million)

Figure 66. India Lateral Flow Membrane Consumption Value (2021-2032) & (USD Million)

Figure 67. Southeast Asia Lateral Flow Membrane Consumption Value (2021-2032) & (USD Million)

Figure 68. Australia Lateral Flow Membrane Consumption Value (2021-2032) & (USD Million)

Figure 69. South America Lateral Flow Membrane Sales Quantity Market Share by Type (2021-2032)

Figure 70. South America Lateral Flow Membrane Sales Quantity Market Share by Application (2021-2032)

Figure 71. South America Lateral Flow Membrane Sales Quantity Market Share by Country (2021-2032)

Figure 72. South America Lateral Flow Membrane Consumption Value Market Share by Country (2021-2032)

Figure 73. Brazil Lateral Flow Membrane Consumption Value (2021-2032) & (USD Million)

Figure 74. Argentina Lateral Flow Membrane Consumption Value (2021-2032) & (USD Million)

Figure 75. Middle East & Africa Lateral Flow Membrane Sales Quantity Market Share by Type (2021-2032)

Figure 76. Middle East & Africa Lateral Flow Membrane Sales Quantity Market Share by Application (2021-2032)

Figure 77. Middle East & Africa Lateral Flow Membrane Sales Quantity Market Share by Country (2021-2032)

Figure 78. Middle East & Africa Lateral Flow Membrane Consumption Value Market Share by Country (2021-2032)

Figure 79. Turkey Lateral Flow Membrane Consumption Value (2021-2032) & (USD Million)

Figure 80. Egypt Lateral Flow Membrane Consumption Value (2021-2032) & (USD Million)

Figure 81. Saudi Arabia Lateral Flow Membrane Consumption Value (2021-2032) & (USD Million)

Figure 82. South Africa Lateral Flow Membrane Consumption Value (2021-2032) & (USD Million)

Figure 83. Lateral Flow Membrane Market Drivers

Figure 84. Lateral Flow Membrane Market Restraints

Figure 85. Lateral Flow Membrane Market Trends

Figure 86. Porters Five Forces Analysis

Figure 87. Manufacturing Cost Structure Analysis of Lateral Flow Membrane in 2025

Figure 88. Manufacturing Process Analysis of Lateral Flow Membrane

Figure 89. Lateral Flow Membrane Industrial Chain

Figure 90. Sales Channel: Direct to End-User vs Distributors

Figure 91. Direct Channel Pros & Cons

Figure 92. Indirect Channel Pros & Cons

Figure 93. Methodology

Figure 94. Research Process and Data Source

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