

Global Lateral Flow NC Membrane Market Growth 2026-2032

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Abstracts

The global Lateral Flow NC Membrane market size is predicted to grow from US\$ 101 million in 2025 to US\$ 171 million in 2032; it is expected to grow at a CAGR of 8.6% from 2026 to 2032.

Lateral Flow NC 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 exhibits 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 NC Membrane manufacturers is projected to be approximately 44.36%-59.54%. Depending on the product's form, some manufacturers 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 manufacturers generally charging higher prices than Chinese manufacturers. Production capacity varies among companies; 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 NC 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 NC 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.

LP Information, Inc. (LPI) ' newest research report, the “Lateral Flow NC Membrane Industry Forecast” looks at past sales and reviews total world Lateral Flow NC Membrane sales in 2025, providing a comprehensive analysis by region and market sector of projected Lateral Flow NC Membrane sales for 2026 through 2032. With Lateral Flow NC Membrane sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Lateral Flow NC Membrane industry.

This Insight Report provides a comprehensive analysis of the global Lateral Flow NC Membrane landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Lateral Flow NC Membrane portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Lateral Flow NC Membrane market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Lateral Flow NC Membrane and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Lateral Flow NC Membrane.

This report presents a comprehensive overview, market shares, and growth opportunities of Lateral Flow NC Membrane market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Thickness max. 250 μm

Thickness above 250 μm

Segmentation by Material:

Polyester?backed NC

Unbacked Nitrocellulose (NC)

Segmentation by Wicking Rate (s/4 cm):

Standard-Flow (Medium): 100–140s/4cm

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

Segmentation by Application:

Medical Diagnostics and Point-of-Care (POC)

Drug of Abuse Testing

Food Safety and Environmental

Other Applications

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Merck

Sartorius

Danaher (Cytiva)

Advantec

Advanced Microdevices (MDI)

Equinox Biotech

Tianren

Zhejiang Tailin Bioengineering

BSK Basic

Beijia New Material

Kingfa

Cobetter

Key Questions Addressed in this Report

What is the 10-year outlook for the global Lateral Flow NC Membrane market?

What factors are driving Lateral Flow NC Membrane market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Lateral Flow NC Membrane market opportunities vary by end market size?

How does Lateral Flow NC Membrane break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

- 2.1.1 Global Lateral Flow NC Membrane Annual Sales 2021-2032

- 2.1.2 World Current & Future Analysis for Lateral Flow NC Membrane by Geographic Region, 2021, 2025 & 2032

- 2.1.3 World Current & Future Analysis for Lateral Flow NC Membrane by Country/Region, 2021, 2025 & 2032

2.2 Lateral Flow NC Membrane Segment by Type

- 2.2.1 Thickness max. 250 μ m

- 2.2.2 Thickness above 250 μ m

- 2.2.3 Lateral Flow NC Membrane Sales by Type

- 2.2.3.1 Global Lateral Flow NC Membrane Sales Market Share by Type (2021-2026)

- 2.2.3.2 Global Lateral Flow NC Membrane Revenue and Market Share by Type

- (2021-2026)

- 2.2.3.3 Global Lateral Flow NC Membrane Sale Price by Type (2021-2026)

2.3 Lateral Flow NC Membrane Segment by Material

- 2.3.1 Polyester?backed NC

- 2.3.2 Unbacked Nitrocellulose (NC)

- 2.3.3 Lateral Flow NC Membrane Sales by Material

- 2.3.3.1 Global Lateral Flow NC Membrane Sales Market Share by Material

- (2021-2026)

- 2.3.3.2 Global Lateral Flow NC Membrane Revenue and Market Share by Material

- (2021-2026)

- 2.3.3.3 Global Lateral Flow NC Membrane Sale Price by Material (2021-2026)

2.4 Lateral Flow NC Membrane Segment by Wicking Rate (s/4 cm)

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

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

2.4.4 Lateral Flow NC Membrane Sales by Wicking Rate (s/4 cm)

2.4.4.1 Global Lateral Flow NC Membrane Sales Market Share by Wicking Rate (s/4 cm) (2021-2026)

2.4.4.2 Global Lateral Flow NC Membrane Revenue and Market Share by Wicking Rate (s/4 cm) (2021-2026)

2.4.4.3 Global Lateral Flow NC Membrane Sale Price by Wicking Rate (s/4 cm) (2021-2026)

2.5 Lateral Flow NC Membrane Segment by Application

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

2.5.2 Drug of Abuse Testing

2.5.3 Food Safety and Environmental

2.5.4 Other Applications

2.5.5 Lateral Flow NC Membrane Sales by Application

2.5.5.1 Global Lateral Flow NC Membrane Sale Market Share by Application (2021-2026)

2.5.5.2 Global Lateral Flow NC Membrane Revenue and Market Share by Application (2021-2026)

2.5.5.3 Global Lateral Flow NC Membrane Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Lateral Flow NC Membrane Breakdown Data by Company

3.1.1 Global Lateral Flow NC Membrane Annual Sales by Company (2021-2026)

3.1.2 Global Lateral Flow NC Membrane Sales Market Share by Company (2021-2026)

3.2 Global Lateral Flow NC Membrane Annual Revenue by Company (2021-2026)

3.2.1 Global Lateral Flow NC Membrane Revenue by Company (2021-2026)

3.2.2 Global Lateral Flow NC Membrane Revenue Market Share by Company (2021-2026)

3.3 Global Lateral Flow NC Membrane Sale Price by Company

3.4 Key Manufacturers Lateral Flow NC Membrane Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Lateral Flow NC Membrane Product Location Distribution

3.4.2 Players Lateral Flow NC Membrane Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

- 3.6 New Products and Potential Entrants
- 3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR LATERAL FLOW NC MEMBRANE BY GEOGRAPHIC REGION

- 4.1 World Historic Lateral Flow NC Membrane Market Size by Geographic Region (2021-2026)
 - 4.1.1 Global Lateral Flow NC Membrane Annual Sales by Geographic Region (2021-2026)
 - 4.1.2 Global Lateral Flow NC Membrane Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic Lateral Flow NC Membrane Market Size by Country/Region (2021-2026)
 - 4.2.1 Global Lateral Flow NC Membrane Annual Sales by Country/Region (2021-2026)
 - 4.2.2 Global Lateral Flow NC Membrane Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas Lateral Flow NC Membrane Sales Growth
- 4.4 APAC Lateral Flow NC Membrane Sales Growth
- 4.5 Europe Lateral Flow NC Membrane Sales Growth
- 4.6 Middle East & Africa Lateral Flow NC Membrane Sales Growth

5 AMERICAS

- 5.1 Americas Lateral Flow NC Membrane Sales by Country
 - 5.1.1 Americas Lateral Flow NC Membrane Sales by Country (2021-2026)
 - 5.1.2 Americas Lateral Flow NC Membrane Revenue by Country (2021-2026)
- 5.2 Americas Lateral Flow NC Membrane Sales by Type (2021-2026)
- 5.3 Americas Lateral Flow NC Membrane Sales by Application (2021-2026)
- 5.4 United States
- 5.5 Canada
- 5.6 Mexico
- 5.7 Brazil

6 APAC

- 6.1 APAC Lateral Flow NC Membrane Sales by Region
 - 6.1.1 APAC Lateral Flow NC Membrane Sales by Region (2021-2026)
 - 6.1.2 APAC Lateral Flow NC Membrane Revenue by Region (2021-2026)

- 6.2 APAC Lateral Flow NC Membrane Sales by Type (2021-2026)
- 6.3 APAC Lateral Flow NC Membrane Sales by Application (2021-2026)
- 6.4 China
- 6.5 Japan
- 6.6 South Korea
- 6.7 Southeast Asia
- 6.8 India
- 6.9 Australia
- 6.10 China Taiwan

7 EUROPE

- 7.1 Europe Lateral Flow NC Membrane by Country
 - 7.1.1 Europe Lateral Flow NC Membrane Sales by Country (2021-2026)
 - 7.1.2 Europe Lateral Flow NC Membrane Revenue by Country (2021-2026)
- 7.2 Europe Lateral Flow NC Membrane Sales by Type (2021-2026)
- 7.3 Europe Lateral Flow NC Membrane Sales by Application (2021-2026)
- 7.4 Germany
- 7.5 France
- 7.6 UK
- 7.7 Italy
- 7.8 Russia

8 MIDDLE EAST & AFRICA

- 8.1 Middle East & Africa Lateral Flow NC Membrane by Country
 - 8.1.1 Middle East & Africa Lateral Flow NC Membrane Sales by Country (2021-2026)
 - 8.1.2 Middle East & Africa Lateral Flow NC Membrane Revenue by Country (2021-2026)
- 8.2 Middle East & Africa Lateral Flow NC Membrane Sales by Type (2021-2026)
- 8.3 Middle East & Africa Lateral Flow NC Membrane Sales by Application (2021-2026)
- 8.4 Egypt
- 8.5 South Africa
- 8.6 Israel
- 8.7 Turkey
- 8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

- 9.1 Market Drivers & Growth Opportunities
- 9.2 Market Challenges & Risks
- 9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

- 10.1 Raw Material and Suppliers
- 10.2 Manufacturing Cost Structure Analysis of Lateral Flow NC Membrane
- 10.3 Manufacturing Process Analysis of Lateral Flow NC Membrane
- 10.4 Industry Chain Structure of Lateral Flow NC Membrane

11 MARKETING, DISTRIBUTORS AND CUSTOMER

- 11.1 Sales Channel
 - 11.1.1 Direct Channels
 - 11.1.2 Indirect Channels
- 11.2 Lateral Flow NC Membrane Distributors
- 11.3 Lateral Flow NC Membrane Customer

12 WORLD FORECAST REVIEW FOR LATERAL FLOW NC MEMBRANE BY GEOGRAPHIC REGION

- 12.1 Global Lateral Flow NC Membrane Market Size Forecast by Region
 - 12.1.1 Global Lateral Flow NC Membrane Forecast by Region (2027-2032)
 - 12.1.2 Global Lateral Flow NC Membrane Annual Revenue Forecast by Region (2027-2032)
- 12.2 Americas Forecast by Country (2027-2032)
- 12.3 APAC Forecast by Region (2027-2032)
- 12.4 Europe Forecast by Country (2027-2032)
- 12.5 Middle East & Africa Forecast by Country (2027-2032)
- 12.6 Global Lateral Flow NC Membrane Forecast by Type (2027-2032)
- 12.7 Global Lateral Flow NC Membrane Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

- 13.1 Merck
 - 13.1.1 Merck Company Information
 - 13.1.2 Merck Lateral Flow NC Membrane Product Portfolios and Specifications
 - 13.1.3 Merck Lateral Flow NC Membrane Sales, Revenue, Price and Gross Margin

(2021-2026)

13.1.4 Merck Main Business Overview

13.1.5 Merck Latest Developments

13.2 Sartorius

13.2.1 Sartorius Company Information

13.2.2 Sartorius Lateral Flow NC Membrane Product Portfolios and Specifications

13.2.3 Sartorius Lateral Flow NC Membrane Sales, Revenue, Price and Gross Margin

(2021-2026)

13.2.4 Sartorius Main Business Overview

13.2.5 Sartorius Latest Developments

13.3 Danaher (Cytiva)

13.3.1 Danaher (Cytiva) Company Information

13.3.2 Danaher (Cytiva) Lateral Flow NC Membrane Product Portfolios and

Specifications

13.3.3 Danaher (Cytiva) Lateral Flow NC Membrane Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 Danaher (Cytiva) Main Business Overview

13.3.5 Danaher (Cytiva) Latest Developments

13.4 Advantec

13.4.1 Advantec Company Information

13.4.2 Advantec Lateral Flow NC Membrane Product Portfolios and Specifications

13.4.3 Advantec Lateral Flow NC Membrane Sales, Revenue, Price and Gross Margin

(2021-2026)

13.4.4 Advantec Main Business Overview

13.4.5 Advantec Latest Developments

13.5 Advanced Microdevices (MDI)

13.5.1 Advanced Microdevices (MDI) Company Information

13.5.2 Advanced Microdevices (MDI) Lateral Flow NC Membrane Product Portfolios and Specifications

13.5.3 Advanced Microdevices (MDI) Lateral Flow NC Membrane Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Advanced Microdevices (MDI) Main Business Overview

13.5.5 Advanced Microdevices (MDI) Latest Developments

13.6 Equinox Biotech

13.6.1 Equinox Biotech Company Information

13.6.2 Equinox Biotech Lateral Flow NC Membrane Product Portfolios and Specifications

13.6.3 Equinox Biotech Lateral Flow NC Membrane Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.6.4 Equinox Biotech Main Business Overview
- 13.6.5 Equinox Biotech Latest Developments
- 13.7 Tianren
 - 13.7.1 Tianren Company Information
 - 13.7.2 Tianren Lateral Flow NC Membrane Product Portfolios and Specifications
 - 13.7.3 Tianren Lateral Flow NC Membrane Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.7.4 Tianren Main Business Overview
 - 13.7.5 Tianren Latest Developments
- 13.8 Zhejiang Tailin Bioengineering
 - 13.8.1 Zhejiang Tailin Bioengineering Company Information
 - 13.8.2 Zhejiang Tailin Bioengineering Lateral Flow NC Membrane Product Portfolios and Specifications
 - 13.8.3 Zhejiang Tailin Bioengineering Lateral Flow NC Membrane Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.8.4 Zhejiang Tailin Bioengineering Main Business Overview
 - 13.8.5 Zhejiang Tailin Bioengineering Latest Developments
- 13.9 BSK Basic
 - 13.9.1 BSK Basic Company Information
 - 13.9.2 BSK Basic Lateral Flow NC Membrane Product Portfolios and Specifications
 - 13.9.3 BSK Basic Lateral Flow NC Membrane Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.9.4 BSK Basic Main Business Overview
 - 13.9.5 BSK Basic Latest Developments
- 13.10 Beijia New Material
 - 13.10.1 Beijia New Material Company Information
 - 13.10.2 Beijia New Material Lateral Flow NC Membrane Product Portfolios and Specifications
 - 13.10.3 Beijia New Material Lateral Flow NC Membrane Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.10.4 Beijia New Material Main Business Overview
 - 13.10.5 Beijia New Material Latest Developments
- 13.11 Kingfa
 - 13.11.1 Kingfa Company Information
 - 13.11.2 Kingfa Lateral Flow NC Membrane Product Portfolios and Specifications
 - 13.11.3 Kingfa Lateral Flow NC Membrane Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.11.4 Kingfa Main Business Overview
 - 13.11.5 Kingfa Latest Developments

13.12 Cobetter

13.12.1 Cobetter Company Information

13.12.2 Cobetter Lateral Flow NC Membrane Product Portfolios and Specifications

13.12.3 Cobetter Lateral Flow NC Membrane Sales, Revenue, Price and Gross Margin
(2021-2026)

13.12.4 Cobetter Main Business Overview

13.12.5 Cobetter Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

- Table 1. Lateral Flow NC Membrane Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Table 2. Lateral Flow NC Membrane Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of Thickness max. 250 μm
- Table 4. Major Players of Thickness above 250 μm
- Table 5. Global Lateral Flow NC Membrane Sales by Type (2021-2026) & (M Tests)
- Table 6. Global Lateral Flow NC Membrane Sales Market Share by Type (2021-2026)
- Table 7. Global Lateral Flow NC Membrane Revenue by Type (2021-2026) & (\$ million)
- Table 8. Global Lateral Flow NC Membrane Revenue Market Share by Type (2021-2026)
- Table 9. Global Lateral Flow NC Membrane Sale Price by Type (2021-2026) & (US\$/K Tests)
- Table 10. Major Players of Polyester?backed NC
- Table 11. Major Players of Unbacked Nitrocellulose (NC)
- Table 12. Global Lateral Flow NC Membrane Sales by Material (2021-2026) & (M Tests)
- Table 13. Global Lateral Flow NC Membrane Sales Market Share by Material (2021-2026)
- Table 14. Global Lateral Flow NC Membrane Revenue by Material (2021-2026) & (\$ million)
- Table 15. Global Lateral Flow NC Membrane Revenue Market Share by Material (2021-2026)
- Table 16. Global Lateral Flow NC Membrane Sale Price by Material (2021-2026) & (US\$/K Tests)
- Table 17. Major Players of Standard-Flow (Medium): 100–140s/4cm
- Table 18. Major Players of High-Flow (Fast): 140s/4cm
- Table 20. Global Lateral Flow NC Membrane Sales by Wicking Rate (s/4 cm) (2021-2026) & (M Tests)
- Table 21. Global Lateral Flow NC Membrane Sales Market Share by Wicking Rate (s/4 cm) (2021-2026)
- Table 22. Global Lateral Flow NC Membrane Revenue by Wicking Rate (s/4 cm) (2021-2026) & (\$ million)
- Table 23. Global Lateral Flow NC Membrane Revenue Market Share by Wicking Rate (s/4 cm) (2021-2026)
- Table 24. Global Lateral Flow NC Membrane Sale Price by Wicking Rate (s/4 cm)

(2021-2026) & (US\$/K Tests)

Table 25. Global Lateral Flow NC Membrane Sale by Application (2021-2026) & (M Tests)

Table 26. Global Lateral Flow NC Membrane Sale Market Share by Application (2021-2026)

Table 27. Global Lateral Flow NC Membrane Revenue by Application (2021-2026) & (\$ million)

Table 28. Global Lateral Flow NC Membrane Revenue Market Share by Application (2021-2026)

Table 29. Global Lateral Flow NC Membrane Sale Price by Application (2021-2026) & (US\$/K Tests)

Table 30. Global Lateral Flow NC Membrane Sales by Company (2021-2026) & (M Tests)

Table 31. Global Lateral Flow NC Membrane Sales Market Share by Company (2021-2026)

Table 32. Global Lateral Flow NC Membrane Revenue by Company (2021-2026) & (\$ millions)

Table 33. Global Lateral Flow NC Membrane Revenue Market Share by Company (2021-2026)

Table 34. Global Lateral Flow NC Membrane Sale Price by Company (2021-2026) & (US\$/K Tests)

Table 35. Key Manufacturers Lateral Flow NC Membrane Producing Area Distribution and Sales Area

Table 36. Players Lateral Flow NC Membrane Products Offered

Table 37. Lateral Flow NC Membrane Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 38. New Products and Potential Entrants

Table 39. Market M&A Activity & Strategy

Table 40. Global Lateral Flow NC Membrane Sales by Geographic Region (2021-2026) & (M Tests)

Table 41. Global Lateral Flow NC Membrane Sales Market Share Geographic Region (2021-2026)

Table 42. Global Lateral Flow NC Membrane Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 43. Global Lateral Flow NC Membrane Revenue Market Share by Geographic Region (2021-2026)

Table 44. Global Lateral Flow NC Membrane Sales by Country/Region (2021-2026) & (M Tests)

Table 45. Global Lateral Flow NC Membrane Sales Market Share by Country/Region

(2021-2026)

Table 46. Global Lateral Flow NC Membrane Revenue by Country/Region (2021-2026) & (\$ millions)

Table 47. Global Lateral Flow NC Membrane Revenue Market Share by Country/Region (2021-2026)

Table 48. Americas Lateral Flow NC Membrane Sales by Country (2021-2026) & (M Tests)

Table 49. Americas Lateral Flow NC Membrane Sales Market Share by Country (2021-2026)

Table 50. Americas Lateral Flow NC Membrane Revenue by Country (2021-2026) & (\$ millions)

Table 51. Americas Lateral Flow NC Membrane Sales by Type (2021-2026) & (M Tests)

Table 52. Americas Lateral Flow NC Membrane Sales by Application (2021-2026) & (M Tests)

Table 53. APAC Lateral Flow NC Membrane Sales by Region (2021-2026) & (M Tests)

Table 54. APAC Lateral Flow NC Membrane Sales Market Share by Region (2021-2026)

Table 55. APAC Lateral Flow NC Membrane Revenue by Region (2021-2026) & (\$ millions)

Table 56. APAC Lateral Flow NC Membrane Sales by Type (2021-2026) & (M Tests)

Table 57. APAC Lateral Flow NC Membrane Sales by Application (2021-2026) & (M Tests)

Table 58. Europe Lateral Flow NC Membrane Sales by Country (2021-2026) & (M Tests)

Table 59. Europe Lateral Flow NC Membrane Revenue by Country (2021-2026) & (\$ millions)

Table 60. Europe Lateral Flow NC Membrane Sales by Type (2021-2026) & (M Tests)

Table 61. Europe Lateral Flow NC Membrane Sales by Application (2021-2026) & (M Tests)

Table 62. Middle East & Africa Lateral Flow NC Membrane Sales by Country (2021-2026) & (M Tests)

Table 63. Middle East & Africa Lateral Flow NC Membrane Revenue Market Share by Country (2021-2026)

Table 64. Middle East & Africa Lateral Flow NC Membrane Sales by Type (2021-2026) & (M Tests)

Table 65. Middle East & Africa Lateral Flow NC Membrane Sales by Application (2021-2026) & (M Tests)

Table 66. Key Market Drivers & Growth Opportunities of Lateral Flow NC Membrane

Table 67. Key Market Challenges & Risks of Lateral Flow NC Membrane

- Table 68. Key Industry Trends of Lateral Flow NC Membrane
- Table 69. Lateral Flow NC Membrane Raw Material
- Table 70. Key Suppliers of Raw Materials
- Table 71. Lateral Flow NC Membrane Distributors List
- Table 72. Lateral Flow NC Membrane Customer List
- Table 73. Global Lateral Flow NC Membrane Sales Forecast by Region (2027-2032) & (M Tests)
- Table 74. Global Lateral Flow NC Membrane Revenue Forecast by Region (2027-2032) & (\$ millions)
- Table 75. Americas Lateral Flow NC Membrane Sales Forecast by Country (2027-2032) & (M Tests)
- Table 76. Americas Lateral Flow NC Membrane Annual Revenue Forecast by Country (2027-2032) & (\$ millions)
- Table 77. APAC Lateral Flow NC Membrane Sales Forecast by Region (2027-2032) & (M Tests)
- Table 78. APAC Lateral Flow NC Membrane Annual Revenue Forecast by Region (2027-2032) & (\$ millions)
- Table 79. Europe Lateral Flow NC Membrane Sales Forecast by Country (2027-2032) & (M Tests)
- Table 80. Europe Lateral Flow NC Membrane Revenue Forecast by Country (2027-2032) & (\$ millions)
- Table 81. Middle East & Africa Lateral Flow NC Membrane Sales Forecast by Country (2027-2032) & (M Tests)
- Table 82. Middle East & Africa Lateral Flow NC Membrane Revenue Forecast by Country (2027-2032) & (\$ millions)
- Table 83. Global Lateral Flow NC Membrane Sales Forecast by Type (2027-2032) & (M Tests)
- Table 84. Global Lateral Flow NC Membrane Revenue Forecast by Type (2027-2032) & (\$ millions)
- Table 85. Global Lateral Flow NC Membrane Sales Forecast by Application (2027-2032) & (M Tests)
- Table 86. Global Lateral Flow NC Membrane Revenue Forecast by Application (2027-2032) & (\$ millions)
- Table 87. Merck Basic Information, Lateral Flow NC Membrane Manufacturing Base, Sales Area and Its Competitors
- Table 88. Merck Lateral Flow NC Membrane Product Portfolios and Specifications
- Table 89. Merck Lateral Flow NC Membrane Sales (M Tests), Revenue (\$ Million), Price (US\$/K Tests) and Gross Margin (2021-2026)
- Table 90. Merck Main Business

Table 91. Merck Latest Developments

Table 92. Sartorius Basic Information, Lateral Flow NC Membrane Manufacturing Base, Sales Area and Its Competitors

Table 93. Sartorius Lateral Flow NC Membrane Product Portfolios and Specifications

Table 94. Sartorius Lateral Flow NC Membrane Sales (M Tests), Revenue (\$ Million), Price (US\$/K Tests) and Gross Margin (2021-2026)

Table 95. Sartorius Main Business

Table 96. Sartorius Latest Developments

Table 97. Danaher (Cytiva) Basic Information, Lateral Flow NC Membrane Manufacturing Base, Sales Area and Its Competitors

Table 98. Danaher (Cytiva) Lateral Flow NC Membrane Product Portfolios and Specifications

Table 99. Danaher (Cytiva) Lateral Flow NC Membrane Sales (M Tests), Revenue (\$ Million), Price (US\$/K Tests) and Gross Margin (2021-2026)

Table 100. Danaher (Cytiva) Main Business

Table 101. Danaher (Cytiva) Latest Developments

Table 102. Advantec Basic Information, Lateral Flow NC Membrane Manufacturing Base, Sales Area and Its Competitors

Table 103. Advantec Lateral Flow NC Membrane Product Portfolios and Specifications

Table 104. Advantec Lateral Flow NC Membrane Sales (M Tests), Revenue (\$ Million), Price (US\$/K Tests) and Gross Margin (2021-2026)

Table 105. Advantec Main Business

Table 106. Advantec Latest Developments

Table 107. Advanced Microdevices (MDI) Basic Information, Lateral Flow NC Membrane Manufacturing Base, Sales Area and Its Competitors

Table 108. Advanced Microdevices (MDI) Lateral Flow NC Membrane Product Portfolios and Specifications

Table 109. Advanced Microdevices (MDI) Lateral Flow NC Membrane Sales (M Tests), Revenue (\$ Million), Price (US\$/K Tests) and Gross Margin (2021-2026)

Table 110. Advanced Microdevices (MDI) Main Business

Table 111. Advanced Microdevices (MDI) Latest Developments

Table 112. Equinox Biotech Basic Information, Lateral Flow NC Membrane Manufacturing Base, Sales Area and Its Competitors

Table 113. Equinox Biotech Lateral Flow NC Membrane Product Portfolios and Specifications

Table 114. Equinox Biotech Lateral Flow NC Membrane Sales (M Tests), Revenue (\$ Million), Price (US\$/K Tests) and Gross Margin (2021-2026)

Table 115. Equinox Biotech Main Business

Table 116. Equinox Biotech Latest Developments

- Table 117. Tianren Basic Information, Lateral Flow NC Membrane Manufacturing Base, Sales Area and Its Competitors
- Table 118. Tianren Lateral Flow NC Membrane Product Portfolios and Specifications
- Table 119. Tianren Lateral Flow NC Membrane Sales (M Tests), Revenue (\$ Million), Price (US\$/K Tests) and Gross Margin (2021-2026)
- Table 120. Tianren Main Business
- Table 121. Tianren Latest Developments
- Table 122. Zhejiang Tailin Bioengineering Basic Information, Lateral Flow NC Membrane Manufacturing Base, Sales Area and Its Competitors
- Table 123. Zhejiang Tailin Bioengineering Lateral Flow NC Membrane Product Portfolios and Specifications
- Table 124. Zhejiang Tailin Bioengineering Lateral Flow NC Membrane Sales (M Tests), Revenue (\$ Million), Price (US\$/K Tests) and Gross Margin (2021-2026)
- Table 125. Zhejiang Tailin Bioengineering Main Business
- Table 126. Zhejiang Tailin Bioengineering Latest Developments
- Table 127. BSK Basic Basic Information, Lateral Flow NC Membrane Manufacturing Base, Sales Area and Its Competitors
- Table 128. BSK Basic Lateral Flow NC Membrane Product Portfolios and Specifications
- Table 129. BSK Basic Lateral Flow NC Membrane Sales (M Tests), Revenue (\$ Million), Price (US\$/K Tests) and Gross Margin (2021-2026)
- Table 130. BSK Basic Main Business
- Table 131. BSK Basic Latest Developments
- Table 132. Beijia New Material Basic Information, Lateral Flow NC Membrane Manufacturing Base, Sales Area and Its Competitors
- Table 133. Beijia New Material Lateral Flow NC Membrane Product Portfolios and Specifications
- Table 134. Beijia New Material Lateral Flow NC Membrane Sales (M Tests), Revenue (\$ Million), Price (US\$/K Tests) and Gross Margin (2021-2026)
- Table 135. Beijia New Material Main Business
- Table 136. Beijia New Material Latest Developments
- Table 137. Kingfa Basic Information, Lateral Flow NC Membrane Manufacturing Base, Sales Area and Its Competitors
- Table 138. Kingfa Lateral Flow NC Membrane Product Portfolios and Specifications
- Table 139. Kingfa Lateral Flow NC Membrane Sales (M Tests), Revenue (\$ Million), Price (US\$/K Tests) and Gross Margin (2021-2026)
- Table 140. Kingfa Main Business
- Table 141. Kingfa Latest Developments
- Table 142. Cobetter Basic Information, Lateral Flow NC Membrane Manufacturing Base, Sales Area and Its Competitors

Table 143. Cobetter Lateral Flow NC Membrane Product Portfolios and Specifications

Table 144. Cobetter Lateral Flow NC Membrane Sales (M Tests), Revenue (\$ Million), Price (US\$/K Tests) and Gross Margin (2021-2026)

Table 145. Cobetter Main Business

Table 146. Cobetter Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Lateral Flow NC Membrane
- Figure 2. Lateral Flow NC Membrane Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Lateral Flow NC Membrane Sales Growth Rate 2021-2032 (M Tests)
- Figure 7. Global Lateral Flow NC Membrane Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Lateral Flow NC Membrane Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Lateral Flow NC Membrane Sales Market Share by Country/Region (2025)
- Figure 10. Lateral Flow NC Membrane Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Thickness max. 250 μm
- Figure 12. Product Picture of Thickness above 250 μm
- Figure 13. Global Lateral Flow NC Membrane Sales Market Share by Type in 2026
- Figure 14. Global Lateral Flow NC Membrane Revenue Market Share by Type (2021-2026)
- Figure 15. Product Picture of Polyester?backed NC
- Figure 16. Product Picture of Unbacked Nitrocellulose (NC)
- Figure 17. Global Lateral Flow NC Membrane Sales Market Share by Material in 2026
- Figure 18. Global Lateral Flow NC Membrane Revenue Market Share by Material (2021-2026)
- Figure 19. Product Picture of Standard-Flow (Medium): 100–140s/4cm
- Figure 20. Product Picture of High-Flow (Fast): 140s/4cm
- Figure 22. Global Lateral Flow NC Membrane Sales Market Share by Wicking Rate (s/4 cm) in 2026
- Figure 23. Global Lateral Flow NC Membrane Revenue Market Share by Wicking Rate (s/4 cm) (2021-2026)
- Figure 24. Lateral Flow NC Membrane Consumed in Medical Diagnostics and Point-of-Care (POC)
- Figure 25. Global Lateral Flow NC Membrane Market: Medical Diagnostics and Point-of-Care (POC) (2021-2026) & (M Tests)
- Figure 26. Lateral Flow NC Membrane Consumed in Drug of Abuse Testing
- Figure 27. Global Lateral Flow NC Membrane Market: Drug of Abuse Testing

(2021-2026) & (M Tests)

Figure 28. Lateral Flow NC Membrane Consumed in Food Safety and Environmental

Figure 29. Global Lateral Flow NC Membrane Market: Food Safety and Environmental (2021-2026) & (M Tests)

Figure 30. Lateral Flow NC Membrane Consumed in Other Applications

Figure 31. Global Lateral Flow NC Membrane Market: Other Applications (2021-2026) & (M Tests)

Figure 32. Global Lateral Flow NC Membrane Sale Market Share by Application (2025)

Figure 33. Global Lateral Flow NC Membrane Revenue Market Share by Application in 2025

Figure 34. Lateral Flow NC Membrane Sales by Company in 2025 (M Tests)

Figure 35. Global Lateral Flow NC Membrane Sales Market Share by Company in 2025

Figure 36. Lateral Flow NC Membrane Revenue by Company in 2025 (\$ millions)

Figure 37. Global Lateral Flow NC Membrane Revenue Market Share by Company in 2025

Figure 38. Global Lateral Flow NC Membrane Sales Market Share by Geographic Region (2021-2026)

Figure 39. Global Lateral Flow NC Membrane Revenue Market Share by Geographic Region in 2025

Figure 40. Americas Lateral Flow NC Membrane Sales 2021-2026 (M Tests)

Figure 41. Americas Lateral Flow NC Membrane Revenue 2021-2026 (\$ millions)

Figure 42. APAC Lateral Flow NC Membrane Sales 2021-2026 (M Tests)

Figure 43. APAC Lateral Flow NC Membrane Revenue 2021-2026 (\$ millions)

Figure 44. Europe Lateral Flow NC Membrane Sales 2021-2026 (M Tests)

Figure 45. Europe Lateral Flow NC Membrane Revenue 2021-2026 (\$ millions)

Figure 46. Middle East & Africa Lateral Flow NC Membrane Sales 2021-2026 (M Tests)

Figure 47. Middle East & Africa Lateral Flow NC Membrane Revenue 2021-2026 (\$ millions)

Figure 48. Americas Lateral Flow NC Membrane Sales Market Share by Country in 2025

Figure 49. Americas Lateral Flow NC Membrane Revenue Market Share by Country (2021-2026)

Figure 50. Americas Lateral Flow NC Membrane Sales Market Share by Type (2021-2026)

Figure 51. Americas Lateral Flow NC Membrane Sales Market Share by Application (2021-2026)

Figure 52. United States Lateral Flow NC Membrane Revenue Growth 2021-2026 (\$ millions)

Figure 53. Canada Lateral Flow NC Membrane Revenue Growth 2021-2026 (\$ millions)

- Figure 54. Mexico Lateral Flow NC Membrane Revenue Growth 2021-2026 (\$ millions)
- Figure 55. Brazil Lateral Flow NC Membrane Revenue Growth 2021-2026 (\$ millions)
- Figure 56. APAC Lateral Flow NC Membrane Sales Market Share by Region in 2025
- Figure 57. APAC Lateral Flow NC Membrane Revenue Market Share by Region (2021-2026)
- Figure 58. APAC Lateral Flow NC Membrane Sales Market Share by Type (2021-2026)
- Figure 59. APAC Lateral Flow NC Membrane Sales Market Share by Application (2021-2026)
- Figure 60. China Lateral Flow NC Membrane Revenue Growth 2021-2026 (\$ millions)
- Figure 61. Japan Lateral Flow NC Membrane Revenue Growth 2021-2026 (\$ millions)
- Figure 62. South Korea Lateral Flow NC Membrane Revenue Growth 2021-2026 (\$ millions)
- Figure 63. Southeast Asia Lateral Flow NC Membrane Revenue Growth 2021-2026 (\$ millions)
- Figure 64. India Lateral Flow NC Membrane Revenue Growth 2021-2026 (\$ millions)
- Figure 65. Australia Lateral Flow NC Membrane Revenue Growth 2021-2026 (\$ millions)
- Figure 66. China Taiwan Lateral Flow NC Membrane Revenue Growth 2021-2026 (\$ millions)
- Figure 67. Europe Lateral Flow NC Membrane Sales Market Share by Country in 2025
- Figure 68. Europe Lateral Flow NC Membrane Revenue Market Share by Country (2021-2026)
- Figure 69. Europe Lateral Flow NC Membrane Sales Market Share by Type (2021-2026)
- Figure 70. Europe Lateral Flow NC Membrane Sales Market Share by Application (2021-2026)
- Figure 71. Germany Lateral Flow NC Membrane Revenue Growth 2021-2026 (\$ millions)
- Figure 72. France Lateral Flow NC Membrane Revenue Growth 2021-2026 (\$ millions)
- Figure 73. UK Lateral Flow NC Membrane Revenue Growth 2021-2026 (\$ millions)
- Figure 74. Italy Lateral Flow NC Membrane Revenue Growth 2021-2026 (\$ millions)
- Figure 75. Russia Lateral Flow NC Membrane Revenue Growth 2021-2026 (\$ millions)
- Figure 76. Middle East & Africa Lateral Flow NC Membrane Sales Market Share by Country (2021-2026)
- Figure 77. Middle East & Africa Lateral Flow NC Membrane Sales Market Share by Type (2021-2026)
- Figure 78. Middle East & Africa Lateral Flow NC Membrane Sales Market Share by Application (2021-2026)
- Figure 79. Egypt Lateral Flow NC Membrane Revenue Growth 2021-2026 (\$ millions)

Figure 80. South Africa Lateral Flow NC Membrane Revenue Growth 2021-2026 (\$ millions)

Figure 81. Israel Lateral Flow NC Membrane Revenue Growth 2021-2026 (\$ millions)

Figure 82. Turkey Lateral Flow NC Membrane Revenue Growth 2021-2026 (\$ millions)

Figure 83. GCC Countries Lateral Flow NC Membrane Revenue Growth 2021-2026 (\$ millions)

Figure 84. Manufacturing Cost Structure Analysis of Lateral Flow NC Membrane in 2026

Figure 85. Manufacturing Process Analysis of Lateral Flow NC Membrane

Figure 86. Industry Chain Structure of Lateral Flow NC Membrane

Figure 87. Channels of Distribution

Figure 88. Global Lateral Flow NC Membrane Sales Market Forecast by Region (2027-2032)

Figure 89. Global Lateral Flow NC Membrane Revenue Market Share Forecast by Region (2027-2032)

Figure 90. Global Lateral Flow NC Membrane Sales Market Share Forecast by Type (2027-2032)

Figure 91. Global Lateral Flow NC Membrane Revenue Market Share Forecast by Type (2027-2032)

Figure 92. Global Lateral Flow NC Membrane Sales Market Share Forecast by Application (2027-2032)

Figure 93. Global Lateral Flow NC Membrane Revenue Market Share Forecast by Application (2027-2032)

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