

# Global Nitrocellulose Membranes Market Growth 2026-2032

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## Abstracts

The global Nitrocellulose Membranes market size is predicted to grow from US\$ 158 million in 2025 to US\$ 174 million in 2032; it is expected to grow at a CAGR of 1.4% from 2026 to 2032.

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

To address the problems of low biomolecule adsorption efficiency, insufficient detection sensitivity, and poor reaction stability in traditional detection media, nitrocellulose membranes (NC membranes) were developed. This product is a porous membrane material made from cellulose as a base material, modified through a nitration reaction in a nitric acid-sulfuric acid mixed system. The core principle is to utilize the synergistic effect of the hydrophobic framework and hydrophilic groups formed after nitration modification to achieve efficient adsorption and immobilization of biomolecules such as proteins and nucleic acids. Simultaneously, the precisely controlled pore structure ensures rapid capillary flow of the detection sample within the membrane, providing a stable carrier platform for biochemical reactions such as immunochromatography and nucleic acid hybridization. Experimental data shows that high-quality NC membranes can adsorb 80-120  $\mu\text{g}/\text{cm}^2$  of biomolecules, increasing detection sensitivity by 3-5 times in lateral flow detection scenarios. Since its commercialization in the mid-20th century, NC membranes, with their excellent biocompatibility and detection adaptability, have evolved from a laboratory-specific material to an indispensable core consumable in fields such as in vitro diagnostics and food safety testing.

In 2025, nitrocellulose membranes specifically designed for lateral flow assays will account for over 85% of the global nitrocellulose membrane market. In terms of pricing,

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

### Typical Transaction Case

In the first quarter of 2025, a leading global in-vitro diagnostic company purchased nitrocellulose membranes from Merck Group (Germany), specifically the HiFlow Plus series. The total purchase volume was 350,000 square meters, with a contract value of approximately \$7.8 million. The technical requirements included: 'The product must be compatible with COVID-19 antigen test kits, with a pore size of 80nm and a capillary flow time (4cm distance) of 3-5 minutes; protein adsorption capacity  $\geq 100\mu\text{g}/\text{cm}^2$ , background signal value  $\leq 500$  RFU; temperature resistance range of  $-20^\circ\text{C}$  to  $50^\circ\text{C}$ , with performance degradation  $\leq 5\%$  after 18 months of storage at 40%-80% humidity; the product must be certified under the ISO 13485 medical device quality management system, with a batch pass rate  $\geq 99.8\%$ , and compatible with high-speed automated reagent kit production lines.'

### Industry Pain Points

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

On the product side, core technological barriers are concentrated in the high-end product sector. Key technologies such as pore size uniformity control of precision NC membranes, surface modification technology, and high-stability nitration processes are dominated by a few overseas companies. Domestic companies lag behind in the performance stability of high-end products (for example, under the same testing conditions, the batch-to-batch flow rate difference of domestic general-purpose NC

membranes is 15%-22% higher than that of Merck HiFlow Plus series); at the same time, some small and medium-sized manufacturers suffer from product formula homogenization, resulting in brittle and easily curled membranes, which have defects in adaptability to automated production lines and are prone to false positives and result deviations, thus lowering the overall industry reputation and limiting penetration into the high-end in-vitro diagnostic field.

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

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

demand for precision NC membranes; food safety testing accounts for 18%, used for pesticide residue, veterinary drug residue, and microbial contamination detection, driven by increasingly stringent global regulations; livestock testing accounts for 12%, serving livestock disease and feed additive testing, driven by the trend of large-scale farming; other fields account for 5%, including environmental monitoring and scientific research experiments, where niche specialized NC membranes have high added value and significant growth potential. Industry Trends and Challenges

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

### Demand and Business Opportunity Analysis

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

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

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

This Insight Report provides a comprehensive analysis of the global Nitrocellulose Membranes 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 Nitrocellulose Membranes portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Nitrocellulose Membranes market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Nitrocellulose Membranes 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 Nitrocellulose Membranes.

This report presents a comprehensive overview, market shares, and growth opportunities of Nitrocellulose Membranes market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Small Pore Membrane (6 $\mu$ m)

Segmentation by Structure:

Unsupported NC Membrane

Supported NC Membrane

Segmentation by Performance:

General Purpose NC Membrane

Precision NC Membrane

Specialized NC Membrane

Segmentation by Application:

Biopharmaceutical

Food & Beverage

Research Institutes and Academic Center

Other

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

Cytiva

Thermo Fisher

Pall Corporation

GVS

Abcam

Santa Cruz Biotechnology

Geno Technology

MDI

Macherey-Nagel

Bio-Rad

Avansta

Shanghai Jieyi Biotechnology

Shanghai Jinbiao Biotechnology

### Key Questions Addressed in this Report

What is the 10-year outlook for the global Nitrocellulose Membranes market?

What factors are driving Nitrocellulose Membranes market growth, globally and by region?

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

How do Nitrocellulose Membranes market opportunities vary by end market size?

How does Nitrocellulose Membranes break out by Type, by Application?

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