

Legionella Testing Market Assessment, By Test Type [Urinary Antigen Tests, Direct Fluorescent Antibody Tests, PCR, Culture Method, Others], By Applications [Environmental Testing, Clinical Testing], By End-User [Hospitals, Clinics, Diagnostic Laboratories, Water Treatment Plants, Others], By Region, Opportunities and Forecast, 2017-2031F

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Report description:

Global legionella testing market is projected to witness a CAGR of 7.51% during the forecast period 2024-2031F, growing from USD 351.3 million in 2023 to USD 627 million in 2031F. The market growth is boosted by the increasing prevalence of legionellosis, pneumonia, and Pontiac fever, growing awareness about the importance of legionella testing in preventing infections, and rising efforts by various market players towards enhancing their product portfolio.

The legionella bacteria thrive in water systems such as hot tubs, cooling towers, and plumbing networks. Therefore, various industries, including hospitality, commercial real estate, healthcare, and manufacturing, are investing in regular legionella testing as they understand the activity's benefits and crucial role in maintaining the safety and health of the customers and occupants. Hence, expanding the commercial real estate sector in various regions provides lucrative growth opportunities for the market. India's commercial real estate sector is expected to grow at least 7-8% in 2024.

Various regulatory bodies and governments are taking increasing initiatives, including introducing stringent guidelines and regulations to promote regular water testing, which are among the key global legionella testing market trends. The presence of regulatory standards ensures that water management plans are implemented to mitigate the risk of contamination, especially in areas surrounding nursing homes, hotels, hospitals, and industrial areas.

Other factors bolstering the market expansion include immunology, molecular biology, and microbiology advancements. Advancements in these arenas have aided in the development of legionella testing methods that are more specific and sensitive as well as rapid. They also allow for early detection of contamination by legionella, ensuring prompt intervention by various

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agencies to prevent outbreaks. The rapid expansion of the hospitality sector is also positively influencing market expansion due to an increase in efforts towards ensuring the safety of the tourists.

Increase in Legionella Related Illnesses Boosts the Global Legionella Testing Market Demand

The legionella bacteria are found in water systems and reservoirs and are responsible for causing various diseases, including Pontiac fever and pneumonia. Legionnaires' disease has an incubation period of two to ten days. According to the estimates of the World Health Organization (WHO), 60-70% of the reported cases are of males, and 75-80% are over fifty years of age. The increasing prevalence of hospital-acquired legionella is further propelling market demand. Regular testing helps identify the source of infection and prevent outbreaks. Legionella is consumed by amoeba, multiplying from within before exploding, resulting in an outbreak. Due to this ongoing testing, combating the potential bacterial problems becomes essential. Legionella bacteria tend to grow in slime and biofilms on the surface of streams, lakes, and rivers. Low levels of the organism can colonize different water sources, growing in high concentrations under appropriate conditions.

Technological Advancements Boost Global Legionella Testing Market Growth

Various organizations and research institutes are investing in the development of advanced methods and devices to detect legionella due to the increasing prevalence of the various diseases caused by the bacteria. The traditional methods of monitoring the temperature of the water outlets have been seen to be economically inefficient, manual, and resource-intensive. Thus, the independent internet of things network operator Heliot Europe and Sigfox operators have initiated a partnership with Cisterniser for developing their LinkThru Temperature Monitoring Unit (TMU) devices. These devices have been developed for connecting to Heliot's Sigfox-0G network for IoT. After the device is connected to the pipework system, it harnesses internet of things technology for monitoring the flow and temperature of the water. The data is then captured in appropriate formats for regulators, allowing building owners to ensure compliance with HSG274 regulation in order to reduce the risk of legionella and other pathogens that are waterborne.

North America Accounts for Significant Market Share

The presence of an established healthcare infrastructure, strong water testing regulations, and increasing awareness about the disease are supporting the growth of the North America legionella testing market. The requirement for legionella testing is also propelling due to increasing vulnerability to infection and the expansion of the geriatric population. The regulatory agencies in the region, including the Environmental Protection Agency (EPA) and the Centers for Disease Control and Prevention (CDC), are implementing stringent regulations for monitoring water systems and guidelines for testing for legionella contamination. The presence of various leading market players in North America is further supporting the growth of the market in the region as they are increasing their efforts to introduce legionella testing kits to their portfolios. For instance, in 2021, Thermo Fisher introduced the qulyfast DNA extraction kit for detecting Legionella in clear water samples. The qulyfast Legionella PCR range provides environmental testing laboratories with a workflow that is capable of delivering accurate results within hours.

Urinary Antigen Test Accounts for Significant Global Legionella Testing Market Share

Urinary antigen tests allow for rapid identification of infections, allowing for earlier adoption of preventive measures and targeted therapies. The urinary antigen test is deployed for detecting the molecules of legionella bacterium in urine. Advancements in urinary antigen testing technologies to ensure the provision of reliable results in a time efficient manner are supporting segment expansion. The easy-to-perform and rapid nature of the test as compared to conventional methods is further bolstering their popularity. According to the article Evaluation of Four Lateral Flow Assays for the Detection of Legionella Urinary Antigen, published in Microorganisms journal, the overall specificity and sensitivity of legionella urinary antigen tests are 90.0-94.9% and 53.9-61.5%, respectively. The high specificity and sensitivity offered are propelling the utilization of urinary antigen test and augmenting the expansion of the segment.

Water Treatment Plants Expected to Witness Significant Growth

The rising requirement for legionella testing from water treatment plants is boosting the global legionella testing market size. The presence of legionella in commercial buildings and workplaces can be catastrophic, making testing for legionella an essential requirement. The bacteria are found in water and are inhaled through airborne droplets that are often created by cold or hot water systems. If inhaled, it can lead to legionnaires disease, one of the most fatal types of pneumonia. The risks presented by legionella make the testing of legionella in water systems and treatment plants essential. With the help of regular testing for legionella, potential and often fatal outbreaks of diseases caused by legionella can be prevented. Due to the growing population,

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investments towards water treatment plants are increasing, as they are essential for removing hazardous substances and contaminants from water and making it fit for drinking, among other applications. For instance, at present, Austin Water has three water treatment plants that draw water from the Colorado River and treat it to improve water quality and make it fit for drinking.

Future Market Scenario (2024-2031F)

According to the global legionella testing market analysis, the requirement for legionella testing will witness significant increase over the forecast period owing to the increasing need to minimize legionella growth in complex water systems to prevent infections. Due to the rapid expansion of the healthcare sector owing to increasing prevalence of chronic health conditions and rising population, the demand for legionella testing will increase from the sector as healthcare facilities are at a high risk of infection. The growing awareness about the threat of legionella and the risk of colonization in both cold and hot water systems will bolster the market demand in the coming years.

Key Players Landscape and Outlook

The key players in the legionella testing market are BioMerieux SA, Thermo Fisher Scientific Inc., Eurofins Scientific SE, Becton, Dickinson and Company, and Qiagen NV. The growth of the market will be augmented by increasing collaborations and acquisitions. In August 2022, IDEXX laboratories acquired TECTA-PDS, the Canadian water testing company. TECTA specializes in portable instruments that automatically test for enterococci, E. coli, and total coliforms. The TECTA B4 and B16 instruments are capable of providing rapid results to the laboratories. With this expansion, IDEXX expanded their microbiology testing options for in-field and lab-based testing.

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