

PFAS Testing Market by Product Type (Instrument (LC-MS, GC, NMR), Consumables (Columns, Solvents, Reagents), Software), Technique (LC- MS-MS, CIC), Method (EPA, ISO, DIN, ASTM), Application (Water, F&B, Soil, Air, Blood/Serum) - Global Forecast to 2030

Market Report | 2025-03-05 | 332 pages | MarketsandMarkets

AVAILABLE LICENSES:

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

Report description:

The global market for PFAS testing is anticipated to grow from USD 429.2 million in 2024 to USD 969.5 million in 2030 at a CAGR of 14.5% over the forecast period of 2024 to 2030. The high-end technologies of mass spectrometry and chromatography are drastically enhancing contaminant detection accuracy and efficiency. But a key restraint on the development of the PFAS testing market is the unavailability of standard, regulator-accepted laboratory test methods for analysis of PFAS in matrices other than drinking water. The unavailability of standardized test methods causes data inaccuracy and regulatory issues, and as such, slows down the acceptance of PFAS detection by many industries including agriculture, packaging, and wastewater management.

"The technique segment to hold the largest share of the market in 2023."

Based on technique, PFAS testing is divided into liquid chromatography-mass spectrometry-mass spectrometry (LC-MS-MS), gas chromatography-mass spectrometry (GC/MS), mass spectrometry, NMR spectroscopy, combustion chromatography, ELISA, and other methods. The liquid chromatography-mass spectrometry-mass spectrometry (LC-MS-MS) segment held the largest market share of the PFAS testing market in 2023. The coupling of liquid chromatography (LC) and advanced tandem mass spectrometers has significantly eased and accelerated sample analysis. This marriage makes high-throughput analysis possible with minimal or no sample preparation, reducing processing time with increased accuracy and sensitivity. Therefore, these advancements have driven expansion of this market segment, forcing wider application in a number of industries, including pharmaceuticals, clinical diagnostics, environmental monitoring, and food safety analysis.

"The EPA segment to hold the largest share of the market in 2023."

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Based on the method, the market for PFAS testing is divided into EPA, DIN, ISO, ASTM and other tests. The EPA segment is anticipated to lead the market for PFAS testing based on market share during the forecast period. The growth is largely attributed to the rising awareness of health hazards caused by PFAS chemical contaminants that are associated with several diseases like cancer, liver disease, and immune system dysfunction. With regulatory agencies across the globe imposing tighter limits on per- and polyfluoroalkyl substances (PFAS), there is increased demand for precise and effective testing protocols. EPA-validated testing methodologies, including EPA 537, EPA 533, and EPA 8327, have become the benchmark within the industry because they are highly sensitive, specific, and can analyze multiple PFAS compounds in water, soil, and other environmental media. This increasing emphasis on environmental protection and public health is likely to further drive the uptake of EPA-based PFAS testing solutions.

"The market in the North America region is expected to hold a significant market share for PFAS testing in 2022."

The market for PFAS testing encompasses five significant geographies-North America, Europe, Asia Pacific, Latin America, and the Middle East and Africa. North America commanded a major revenue share of the PFAS testing market in 2024 on account of the presence of strict government regulations, strong enforcement mechanisms, and higher awareness among consumers about the harmful effects of PFAS contamination. An increase in expenditure on environmental study, remediation, and enforcement activities has increased the adoption of new PFAS testing technology in the area. The U.S. Environmental Protection Agency (EPA) and Environment Canada have instituted stringent regulations in the form of maximum contaminant level (MCL) levels and mandatory PFAS drinking water, soil, and industrial effluent monitoring. Furthermore, growing interests in the health effects of exposure to PFAS, such as its association with cancer, endocrine disruption, and developmental disorder, have driven further demands for accurate and high-throughput test systems. With the more investments in lab facilities, advanced analytical methods like mass spectrometry, and more government-sponsored PFAS clean-up activities in the near future, North America is certain to continue its dominance in the market for PFAS testing for many years to come.

The primary interviews conducted for this report can be categorized as follows:

-□By Respondent: Supply Side- 70% and Demand Side 30%

-□By Designation: Managers - 45%, CXO & Directors - 30%, and Executives - 25%

-□By Region: North America -40%, Europe -25%, Asia-Pacific -25%, Latin America -5% and Middle East & Africa- 5%

List of key Companies Profiled in the Report:

The prominent players in the PFAS testing market are Merck KGaA (Germany), Agilent Technologies (US), LGC Limited (UK), Waters Corporation (US), Biotage (Sweden), AccuStandard, Inc. (US), PerkinElmer, Inc. (US), Thermo Fisher Scientific, Inc. (US), Phenomenex (US), MACHEREY-NAGEL GmbH & Co. KG (Germany), and Shimadzu Corporation (Japan), among others.

Research Coverage:

This report studies the PFAS testing market based on product type, technique, method, application, and region. It also covers the factors affecting market growth, analyzes the various opportunities and challenges in the market, and provides details of the competitive landscape for market leaders. Furthermore, the report analyzes micro markets with respect to their individual growth trends and forecasts the revenue of the market segments with respect to five main regions (and the respective countries in these regions).

Key Benefits of Buying the Report:

The report will help market leaders/new entrants by providing them with the closest approximations of the revenue numbers for the overall PFAS testing market and its subsegments. It will also help stakeholders better understand the competitive landscape and gain more insights to better position their business and make suitable go-to-market strategies. This report will enable stakeholders to understand the market's pulse and provide them with information on the key market drivers, restraints, opportunities, and challenges

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

The report provides insights on the following pointers:

- Analysis of key drivers (regulatory reforms addressing environmental pollution, higher public awareness regarding population levels, a favorable investment climate driving improvements in environmental capabilities, increasing financial support wastewater treatment projects and programs), restraints (the limited availability of skilled labor, strict storage requirements for pfas testing reagents and analytical standards), opportunities (growth opportunities presented by major markets, growing financial support for treatment projects and programs), and challenges (lack of standardized testing methods across regions).
- Product Development/Innovation: Detailed insights on upcoming technologies, research and development activities, and new product approvals/launches in the PFAS testing market.
- Market Development: Comprehensive information about lucrative markets - the report analyses the market across varied regions.
- Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the PFAS testing market
- Competitive Assessment: In-depth assessment of market shares, growth strategies and product offerings of leading players. A detailed analysis of the key industry players has been done to provide insights into their key strategies, product launches/ approvals, pipeline analysis, acquisitions, partnerships, agreements, collaborations, other recent developments, investment and funding activities, brand/product comparative analysis, and vendor valuation and financial metrics of the PFAS testing market.

Table of Contents:

1	INTRODUCTION	29
1.1	STUDY OBJECTIVES	29
1.2	MARKET DEFINITION	29
1.3	STUDY SCOPE	30
1.3.1	MARKETS COVERED AND REGIONAL SCOPE	30
1.3.2	INCLUSIONS & EXCLUSIONS	31
1.3.3	YEARS CONSIDERED	31
1.3.4	CURRENCY CONSIDERED	32
1.4	STAKEHOLDERS	32
1.5	SUMMARY OF CHANGES	32
2	RESEARCH METHODOLOGY	34
2.1	RESEARCH DATA	34
2.1.1	SECONDARY DATA	35
2.1.1.1	Indicative list of secondary sources	36
2.1.1.2	Key data from secondary sources	36
2.1.2	PRIMARY DATA	37
2.1.2.1	Primary sources	37
2.1.2.2	Key data from primary sources	37
2.1.2.3	Key industry insights	38
2.1.2.4	Breakdown of primary interviews	38
2.2	MARKET SIZE ESTIMATION METHODOLOGY	39
2.2.1	REVENUE MAPPING-BASED MARKET ESTIMATION	41
2.2.2	END USER-BASED MAPPING MARKET ESTIMATION	42
2.3	GROWTH FORECASTING MODEL	43
2.4	DATA TRIANGULATION & MARKET BREAKDOWN	45
2.5	RESEARCH ASSUMPTIONS	46
2.6	RESEARCH LIMITATIONS	46
2.7	RISK ANALYSIS	47
3	EXECUTIVE SUMMARY	48
4	PREMIUM INSIGHTS	52

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 4.1 PFAS TESTING MARKET OVERVIEW 52
- 4.2 PFAS TESTING MARKET, BY PRODUCT TYPE, 2024 VS. 2030 (USD MILLION) 53
- 4.3 PFAS TESTING MARKET, BY TECHNIQUE, 2024 VS. 2030 (USD MILLION) 54
- 4.4 PFAS TESTING MARKET, BY METHOD, 2024 VS. 2030 (USD MILLION) 55
- 4.5 PFAS TESTING MARKET, BY REGION, 2023 55
- 5 MARKET OVERVIEW 56
- 5.1 INTRODUCTION 56
- 5.2 MARKET DYNAMICS 56
 - 5.2.1 DRIVERS 57
 - 5.2.1.1 Regulatory reforms addressing environmental pollution 57
 - 5.2.1.2 Growing concerns over PFAS contamination in water 58
 - 5.2.1.3 Favorable investment climate driving improvements in environmental capabilities 59
 - 5.2.1.4 Increasing financial support for wastewater treatment projects and programs 59
 - 5.2.2 RESTRAINTS 60
 - 5.2.2.1 Strict storage requirements for PFAS testing reagents and analytical standards 61
 - 5.2.3 OPPORTUNITIES 61
 - 5.2.3.1 Growth opportunities presented by major markets 61
 - 5.2.3.2 Growing financial support for treatment projects and programs 62
 - 5.2.3.3 Higher public awareness regarding population levels 63
 - 5.2.4 CHALLENGES 63
 - 5.2.4.1 Lack of standardized testing methods across regions 63
 - 5.2.4.2 Limited availability of skilled labor 64
- 5.3 REGULATORY ANALYSIS 64
 - 5.3.1 REGULATORY LANDSCAPE 64
 - 5.3.2 REGULATORY GUIDELINES 67
 - 5.3.2.1 North America 67
 - 5.3.2.1.1 US 67
 - 5.3.2.1.1.1 Water quality guidelines 67
 - 5.3.2.1.1.2 Air quality guidelines 67
 - 5.3.2.1.1.3 Food quality guidelines 67
 - 5.3.2.1.2 Canada 68
 - 5.3.2.1.2.1 Water quality guidelines 68
 - 5.3.2.1.2.2 Air quality guidelines 68
 - 5.3.2.1.2.3 Food quality guidelines 68
 - 5.3.2.2 Europe 68
 - 5.3.2.2.1 UK 68
 - 5.3.2.2.1.1 Water quality guidelines 68
 - 5.3.2.2.1.2 Air quality guidelines 69
 - 5.3.2.2.1.3 Food quality guidelines 69
 - 5.3.2.2.2 France 69
 - 5.3.2.2.2.1 Water quality guidelines 69
 - 5.3.2.2.2.2 Air quality guidelines 69
 - 5.3.2.2.2.3 Food quality guidelines 70
 - 5.3.2.2.3 Germany 70
 - 5.3.2.2.3.1 Water quality guidelines 70
 - 5.3.2.2.3.2 Air quality guidelines 70

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.3.2.2.3.3	Food quality guidelines	70
5.3.2.3	Asia Pacific	71
5.3.2.3.1	China	71
5.3.2.3.1.1	Water quality guidelines	71
5.3.2.3.1.2	Air quality guidelines	71
5.3.2.3.1.3	Food quality guidelines	71
5.3.2.3.2	Japan	71
5.3.2.3.2.1	Water quality guidelines	71
5.3.2.3.2.2	Air quality guidelines	72
5.3.2.3.2.3	Food quality guidelines	72
5.3.2.3.3	India	72
5.3.2.3.3.1	Water quality guidelines	72
5.3.2.3.3.2	Air quality guidelines	72
5.3.2.3.3.3	Food quality guidelines	73
5.3.2.4	Latin America	73
5.3.2.4.1	Brazil	73
5.3.2.4.1.1	Water quality guidelines	73
5.3.2.4.1.2	Air quality guidelines	73
5.3.2.4.1.3	Food quality guidelines	74
5.3.2.5	Middle East & Africa	74
5.3.2.5.1	UAE	74
5.3.2.5.1.1	Water quality guidelines	74
5.3.2.5.1.2	Air quality guidelines	74
5.3.2.5.1.3	Food quality guidelines	74
5.4	VALUE CHAIN ANALYSIS	75
5.4.1	R&D	76
5.4.2	RAW MATERIAL PROCUREMENT & PRODUCT DEVELOPMENT	76
5.4.3	MARKETING, SALES, AND DISTRIBUTION	76
5.5	SUPPLY CHAIN ANALYSIS	76
5.5.1	PROMINENT COMPANIES	77
5.5.2	SMALL AND MEDIUM-SIZED ENTERPRISES	77
5.5.3	END USERS	77
5.6	ECOSYSTEM ANALYSIS	77
5.7	TRADE ANALYSIS	79
5.7.1	IMPORT SCENARIO (HS CODE 390469)	79
5.7.2	EXPORT SCENARIO (HS CODE 390469)	80
5.8	PATENT ANALYSIS	82
?		
5.9	PRICING ANALYSIS	83
5.9.1	AVERAGE SELLING PRICE TREND OF LC-MS INSTRUMENTS, BY KEY PLAYER, 2024	83
5.9.2	AVERAGE SELLING PRICE TREND OF PFAS INSTRUMENTS, BY TYPE, 2023	85
5.9.3	AVERAGE SELLING PRICE TREND, BY REGION, 2022-2024	86
5.10	TECHNOLOGY ANALYSIS	88
5.10.1	KEY TECHNOLOGIES	88
5.10.1.1	Chromatography	88
5.10.1.2	Mass spectrometry	89
5.10.1.3	Ion chromatography	89

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.10.2 □ COMPLEMENTARY TECHNOLOGIES □ 89
- 5.10.2.1 □ Total organic fluorine (TOF) analysis □ 89
- 5.10.3 □ ADJACENT TECHNOLOGIES □ 90
- 5.10.3.1 □ Environmental monitoring technologies □ 90
- 5.10.3.2 □ Water treatment and filtration technologies □ 90
- 5.11 □ PORTER'S FIVE FORCE ANALYSIS □ 91
- 5.11.1 □ THREAT OF NEW ENTRANTS □ 92
- 5.11.2 □ THREAT OF SUBSTITUTES □ 92
- 5.11.3 □ BARGAINING POWER OF SUPPLIERS □ 92
- 5.11.4 □ BARGAINING POWER OF BUYERS □ 92
- 5.11.5 □ INTENSITY OF COMPETITIVE RIVALRY □ 92
- 5.12 □ KEY STAKEHOLDERS & BUYING CRITERIA □ 92
- 5.12.1 □ KEY STAKEHOLDERS IN BUYING PROCESS □ 93
- 5.12.2 □ KEY BUYING CRITERIA □ 93
- 5.13 □ KEY CONFERENCES & EVENTS IN 2025-2026 □ 94
- 5.14 □ CASE STUDY ANALYSIS □ 95
- 5.15 □ TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES □ 96
- 5.16 □ INVESTMENT & FUNDING SCENARIO □ 97
- 5.17 □ UNMET NEEDS ANALYSIS □ 99
- 5.18 □ IMPACT OF AI/GEN AI ON PFAS TESTING MARKET □ 100
- 6 □ PFAS TESTING MARKET, BY PRODUCT TYPE □ 101
- 6.1 □ INTRODUCTION □ 102
- 6.2 □ INSTRUMENTS □ 102
- 6.2.1 □ LIQUID CHROMATOGRAPHY-MASS SPECTROMETRY (LC-MS) □ 105
- 6.2.1.1 □ Advancements in LC-MS to boost market □ 105
- 6.2.2 □ GAS CHROMATOGRAPHY-MASS SPECTROMETRY (GC-MS) □ 108
- 6.2.2.1 □ Strict regulations, environmental concerns, and rising demand for PFAS testing to drive segmental growth □ 108
- 6.2.3 □ STANDALONE MASS SPECTROMETRY □ 110
- 6.2.3.1 □ Stringent regulations to drive adoption of mass spectrometry □ 110
- ?
- 6.2.4 □ NUCLEAR MAGNETIC RESONANCE SPECTROSCOPY □ 113
- 6.2.4.1 □ Advancements in drug discovery and structural analysis to drive NMR instrument growth □ 113
- 6.2.5 □ OTHER INSTRUMENTS □ 115
- 6.3 □ CONSUMABLES □ 117
- 6.3.1 □ SAMPLE PREPARATION PRODUCTS □ 120
- 6.3.1.1 □ Rising demand for high-quality analytical results to drive growth of sample preparation products □ 120
- 6.3.2 □ CHROMATOGRAPHY COLUMNS □ 122
- 6.3.2.1 □ Increasing demand for high-performance separation in chromatography to drive market growth □ 122
- 6.3.3 □ REFERENCE MATERIALS & ANALYTICAL STANDARDS □ 125
- 6.3.3.1 □ Stringent regulatory standards and quality control requirements to drive propel growth □ 125
- 6.3.4 □ SOLVENTS □ 128
- 6.3.4.1 □ Growing demand for high-purity solvents in analytical testing and pharmaceutical applications to fuel growth □ 128
- 6.3.5 □ MEMBRANE & SYRINGE FILTERS □ 130
- 6.3.5.1 □ Increasing demand for sample purification and contamination control in laboratories to boost market □ 130
- 6.3.6 □ REAGENTS □ 133
- 6.3.6.1 □ Rising demand for high-quality reagents in diagnostics, research, and pharmaceutical applications to favor growth □ 133
- 6.3.7 □ OTHER CONSUMABLES □ 135

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.4 SOFTWARE & SERVICES 137
- 7 PFAS TESTING MARKET, BY TECHNIQUE 140
 - 7.1 INTRODUCTION 141
 - 7.2 LIQUID CHROMATOGRAPHY WITH TANDEM MASS SPECTROMETRY (LC-MS/MS) 142
 - 7.2.1 PREFERRED ANALYTICAL TECHNIQUE FOR DETECTION AND ANALYSIS OF PFAS COMPOUNDS TO DRIVE MARKET GROWTH 142
 - 7.3 GAS CHROMATOGRAPHY-MASS SPECTROMETRY (GC-MS) 143
 - 7.3.1 HIGH COST OF GC INSTRUMENTS AND CONSUMABLES TO LIMIT WIDESPREAD ADOPTION AMONG END USERS 143
 - 7.4 NUCLEAR MAGNETIC RESONANCE SPECTROSCOPY (NMR SPECTROSCOPY) 143
 - 7.4.1 DEMAND FOR HIGH-SPEED, ACCURATE, AND RELIABLE DETECTION CAPABILITIES TO FAVOR GROWTH 143
 - 7.5 MASS SPECTROMETRY 144
 - 7.5.1 AUTOMATED TECHNIQUES WITH MULTI-ANALYTE PFAS DETECTION CAPABILITIES TO CONTRIBUTE TO GROWTH 144
 - 7.6 COMBUSTION ION CHROMATOGRAPHY 145
 - 7.6.1 SHORTAGE OF TRAINED PROFESSIONALS TO OPERATE CHROMATOGRAPHY INSTRUMENTS TO RESTRAIN MARKET GROWTH 145
 - ?
 - 7.7 ENZYME-LINKED IMMUNOSORBENT ASSAYS (ELISA) 146
 - 7.7.1 COST-EFFECTIVE SAMPLE PREPARATION AND USER-FRIENDLY METHODS TO DRIVE ADOPTION 146
 - 7.8 OTHER TECHNIQUES 147
- 8 PFAS TESTING MARKET, BY METHOD 149
 - 8.1 INTRODUCTION 150
 - 8.2 EPA 151
 - 8.2.1 GROWING NEED TO MONITOR AND LIMIT PFAS CONTAMINATION IN DRINKING WATER TO DRIVE MARKET GROWTH 151
 - 8.3 DIN 152
 - 8.3.1 GROWING CONCERNS ABOUT AIR AND WATER POLLUTION TO DRIVE MARKET GROWTH 152
 - 8.4 ISO 153
 - 8.4.1 INCREASING DISCHARGE OF INDUSTRIAL WASTEWATER AND EFFLUENTS TO BOOST GROWTH 153
 - 8.5 ASTM 154
 - 8.5.1 GOVERNMENT REGULATIONS AIMED AT CONTROLLING WATER POLLUTION TO FAVOR MARKET GROWTH 154
 - 8.6 OTHER METHODS 155
- 9 PFAS TESTING MARKET, BY APPLICATION 156
 - 9.1 INTRODUCTION 157
 - 9.2 WATER TESTING 158
 - 9.2.1 GROUND & POTABLE WATER TESTING 158
 - 9.2.1.1 Rising demand for water quality testing driven by PFAS contamination to boost market 158
 - 9.2.2 WASTEWATER TESTING 159
 - 9.2.2.1 Rising demand for wastewater and irrigation water testing to propel market 159
 - 9.3 SOIL TESTING 160
 - 9.3.1 GROWING DEMAND FOR SOIL TESTING TO DRIVE MARKET GROWTH 160
 - 9.4 FOOD & BEVERAGE TESTING 161
 - 9.4.1 GROWING DEMAND FOR ADVANCED ANALYTICAL METHODS IN FOOD & BEVERAGE INDUSTRY TO FUEL GROWTH 161
 - 9.5 BLOOD/SERUM TESTING 162
 - 9.5.1 EFFORTS BY REGULATORY AGENCIES TO MONITOR AND RESTRICT PFAS CONTAMINATION TO CREATE OPPORTUNITIES FOR MARKET PLAYERS 162
 - 9.6 AIR MONITORING 163
 - 9.6.1 COLLABORATIVE REGULATORY ACTIONS DRIVING ENVIRONMENTAL REMEDIATION TO AID GROWTH 163
 - 9.7 MICROBIAL TESTING 164
 - 9.7.1 GROWING RESEARCH FUNDING TO DRIVE GROWTH 164

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

9.8	OTHER APPLICATIONS	165
10	PFAS TESTING MARKET, BY REGION	166
10.1	INTRODUCTION	167
10.2	NORTH AMERICA	168
10.2.1	MACROECONOMIC OUTLOOK FOR NORTH AMERICA	173
10.2.2	US	174
10.2.2.1	US to dominate North American PFAS testing market	174
10.2.3	CANADA	176
10.2.3.1	Increasing government funding to drive adoption of PFAS testing instruments	176
10.3	EUROPE	178
10.4	MACROECONOMIC OUTLOOK FOR EUROPE	182
10.4.1	GERMANY	182
10.4.1.1	Germany to dominate market for PFAS testing in Europe	182
10.4.2	UK	185
10.4.2.1	Favorable funding & investment scenario to drive market growth.	185
10.4.3	FRANCE	187
10.4.3.1	Rising industrial contaminants & pollution to support market growth	187
10.4.4	ITALY	189
10.4.4.1	High levels of water pollution to offer growth opportunities	189
10.4.5	SPAIN	191
10.4.5.1	Strict food regulations and high agricultural imports to drive market growth in Spain	191
10.4.6	REST OF EUROPE	193
10.5	ASIA PACIFIC	195
10.5.1	MACROECONOMIC OUTLOOK FOR ASIA PACIFIC	200
10.5.2	JAPAN	201
10.5.2.1	Rising awareness about analytical technologies to support market growth	201
10.5.3	CHINA	203
10.5.3.1	Increasing R&D expenditure to drive market growth	203
10.5.4	INDIA	205
10.5.4.1	Rising funding programs to drive market	205
10.5.5	AUSTRALIA	207
10.5.5.1	Growing government regulation to support adoption and development of analytical technologies	207
10.5.6	SOUTH KOREA	209
10.5.6.1	Increasing alliances & investments in research to drive market	209
10.5.7	REST OF ASIA PACIFIC	211
10.6	LATIN AMERICA	213
10.6.1	MACROECONOMIC OUTLOOK FOR LATIN AMERICA	217
10.6.2	BRAZIL	218
10.6.2.1	Brazil to dominate Latin American market during forecast period	218
10.6.3	MEXICO	220
10.6.3.1	Strong pharmaceutical industry and increased government support to augment market	220
10.6.4	REST OF LATIN AMERICA	222
10.7	MIDDLE EAST & AFRICA	224
10.7.1	MACROECONOMIC OUTLOOK FOR MIDDLE EAST & AFRICA	228
10.7.2	GCC COUNTRIES	229
10.7.2.1	Lack of regulations for PFAS substances to restrict market growth	229
10.7.3	REST OF MIDDLE EAST & AFRICA	231

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

11	COMPETITIVE LANDSCAPE	234
11.1	INTRODUCTION	234
11.2	KEY PLAYER STRATEGIES/RIGHT TO WIN	234
11.2.1	OVERVIEW OF STRATEGIES ADOPTED BY PLAYERS IN PFAS TESTING MARKET	235
11.3	REVENUE ANALYSIS, 2019-2023	236
11.4	MARKET SHARE ANALYSIS, 2023	237
11.5	MARKET RANKING ANALYSIS, 2023	238
11.6	COMPANY EVALUATION MATRIX: KEY PLAYERS, 2023	239
11.6.1	STARS	239
11.6.2	EMERGING LEADERS	239
11.6.3	PERVASIVE PLAYERS	239
11.6.4	PARTICIPANTS	239
11.6.5	COMPANY FOOTPRINT: KEY PLAYERS, 2023	241
11.6.5.1	Company footprint	241
11.6.5.2	Region footprint	242
11.6.5.3	Product type footprint	243
11.6.5.4	Technique footprint	245
11.6.5.5	Method footprint	246
11.6.5.6	Application footprint	247
11.7	COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2023	248
11.7.1	PROGRESSIVE COMPANIES	248
11.7.2	RESPONSIVE COMPANIES	248
11.7.3	DYNAMIC COMPANIES	248
11.7.4	STARTING BLOCKS	248
11.7.5	COMPETITIVE BENCHMARKING OF STARTUPS/SMES, 2023	250
11.7.5.1	Detailed list of key startups/SMEs	250
11.7.5.2	Competitive benchmarking of key startups/SMEs	251
11.8	COMPETITIVE SCENARIO	251
11.8.1	PRODUCT LAUNCHES	252
11.8.2	DEALS	255
11.8.3	EXPANSIONS	256
11.9	COMPANY VALUATION & FINANCIAL METRICS	258
11.10	BRAND/PRODUCT COMPARISON	259
12	COMPANY PROFILES	260
12.1	KEY PLAYERS	260
12.1.1	AGILENT TECHNOLOGIES, INC.	260
12.1.1.1	Business overview	260
12.1.1.2	Products offered	261
12.1.1.3	Recent developments	263
12.1.1.3.1	Product launches	263
12.1.1.3.2	Deals	263
12.1.1.3.3	Expansions	264
12.1.1.4	MnM view	264
12.1.1.4.1	Key strengths	264
12.1.1.4.2	Strategic choices	264
12.1.1.4.3	Weaknesses & competitive threats	264
12.1.2	DANAHER CORPORATION	265

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 12.1.2.1 Business overview 265
- 12.1.2.2 Products offered 266
- 12.1.2.3 Recent developments 267
 - 12.1.2.3.1 Product launches 267
 - 12.1.2.3.2 Deals 268
- 12.1.2.4 MnM view 268
 - 12.1.2.4.1 Key strengths 268
 - 12.1.2.4.2 Strategic choices 268
 - 12.1.2.4.3 Weaknesses & competitive threats 268
- 12.1.3 WATERS CORPORATION 269
 - 12.1.3.1 Business overview 269
 - 12.1.3.2 Products offered 270
 - 12.1.3.3 Recent developments 272
 - 12.1.3.3.1 Product launches 272
 - 12.1.3.4 MnM view 272
 - 12.1.3.4.1 Key strengths 272
 - 12.1.3.4.2 Strategic choices 272
 - 12.1.3.4.3 Weaknesses & competitive threats 272
- 12.1.4 THERMO FISHER SCIENTIFIC INC. 273
 - 12.1.4.1 Business overview 273
 - 12.1.4.2 Products offered 275
 - 12.1.4.3 Recent developments 277
 - 12.1.4.3.1 Product launches 277
 - 12.1.4.4 MnM view 277
 - 12.1.4.4.1 Key strengths 277
 - 12.1.4.4.2 Strategic choices 277
 - 12.1.4.4.3 Weaknesses & competitive threats 277
- ?
- 12.1.5 SHIMADZU CORPORATION 278
 - 12.1.5.1 Business overview 278
 - 12.1.5.2 Products offered 279
 - 12.1.5.3 Recent developments 281
 - 12.1.5.3.1 Expansions 281
 - 12.1.5.4 MnM view 281
 - 12.1.5.4.1 Key strengths 281
 - 12.1.5.4.2 Strategic choices 281
 - 12.1.5.4.3 Weaknesses & competitive threats 281
- 12.1.6 MERCK KGAA 282
 - 12.1.6.1 Business overview 282
 - 12.1.6.2 Products offered 283
 - 12.1.6.3 Recent developments 285
 - 12.1.6.3.1 Expansions 285
- 12.1.7 PERKINELMER INC. 286
 - 12.1.7.1 Business overview 286
 - 12.1.7.2 Products offered 288
- 12.1.8 LGC LIMITED 291
 - 12.1.8.1 Business overview 291

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 12.1.8.2□Products offered□293
- 12.1.8.3□Recent developments□295
- 12.1.8.3.1□Product launches□295
- 12.1.8.3.2□Deals□295
- 12.1.8.3.3□Expansions□295
- 12.1.9□BIOTAGE□296
- 12.1.9.1□Business overview□296
- 12.1.9.2□Products offered□297
- 12.1.9.3□Recent developments□298
- 12.1.9.3.1□Expansions□298
- 12.1.10□MACHEREY-NAGEL GMBH & CO. KG□299
- 12.1.10.1□Business overview□299
- 12.1.10.2□Products offered□299
- 12.1.10.3□Recent developments□300
- 12.1.10.3.1□Product launches□300
- 12.1.11□ACCUSTANDARD□301
- 12.1.11.1□Business overview□301
- 12.1.11.2□Products offered□301
- 12.1.11.3□Recent developments□302
- 12.1.11.3.1□Product launches□302
- ?
- 12.1.12□WELLINGTON LABORATORIES INC.□304
- 12.1.12.1□Business overview□304
- 12.1.12.2□Products offered□304
- 12.1.12.3□Recent developments□305
- 12.1.12.3.1□Product launches□305
- 12.1.13□CAMBRIDGE ISOTOPE LABORATORIES, INC.□307
- 12.1.13.1□Business overview□307
- 12.1.13.2□Products offered□307
- 12.1.13.3□Recent developments□308
- 12.1.13.3.1□Expansions□308
- 12.1.14□CHIRON AS□309
- 12.1.14.1□Business overview□309
- 12.1.14.2□Products offered□309
- 12.1.15□METROHM INULA GMBH□311
- 12.1.15.1□Business overview□311
- 12.1.15.2□Products offered□311
- 12.2□OTHER COMPANIES□312
- 12.2.1□RESTEK CORPORATION□312
- 12.2.2□MICROSAIC□313
- 12.2.3□EVONIK□314
- 12.2.4□LCTECH□315
- 12.2.5□ABSOLUTE STANDARDS INC.□316
- 12.2.6□CYTIVA□317
- 12.2.7□AVANTOR, INC.□318
- 12.2.8□GREYHOUND CHROMATOGRAPHY AND ALLIED CHEMICALS LTD.□319
- 12.2.9□LANXESS□320

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

12.2.10 THE CHEMOURS COMPANY 321

13 APPENDIX 322

13.1 DISCUSSION GUIDE 322

13.2 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL 328

13.3 CUSTOMIZATION OPTIONS 330

13.4 RELATED REPORTS 330

13.5 AUTHOR DETAILS 331

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

PFAS Testing Market by Product Type (Instrument (LC-MS, GC, NMR), Consumables (Columns, Solvents, Reagents), Software), Technique (LC- MS-MS, CIC), Method (EPA, ISO, DIN, ASTM), Application (Water, F&B, Soil, Air, Blood/Serum) - Global Forecast to 2030

Market Report | 2025-03-05 | 332 pages | MarketsandMarkets

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Zip Code*

Country*

Date

2025-05-19

Signature

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com