

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

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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."

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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

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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.

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