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Water Testing - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 130 pages | Mordor Intelligence

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Report description:

Water Testing Market Analysis

Water testing market size in 2026 is estimated at USD 4.83 billion, growing from 2025 value of USD 4.59 billion with 2031 projections showing USD 6.26 billion, growing at 5.32% CAGR over 2026-2031. This growth is primarily driven by the implementation of stricter water quality regulations by governments across the globe, aimed at ensuring safer water for consumption and environmental sustainability. Additionally, continuous advancements in analytical testing equipment have enhanced the accuracy and efficiency of water testing processes, further supporting market expansion. Public awareness regarding the health risks posed by contaminated water has also increased significantly, prompting greater demand for reliable water testing solutions. A notable driver of the market is the rising focus on testing for per- and polyfluoroalkyl substances (PFAS), particularly in light of the Environmental Protection Agency's (EPA) proposal to establish stringent limits of 4 parts per trillion for perfluorooctanoic acid (PFOA) and perfluorooctane sulfonate (PFOS) compounds. This regulatory development has led to a substantial increase in the adoption of advanced Liquid Chromatography-Tandem Mass Spectrometry (LC-MS/MS) analytical systems, which are now widely utilized by testing laboratories and environmental monitoring facilities to meet the growing demand for precise and comprehensive water quality analysis.

Global Water Testing Market Trends and Insights

Increasing Regulatory Stringency on Water Quality Standards Globally

Regulatory changes across jurisdictions drive demand for advanced analytical capabilities as agencies expand their monitored contaminant lists and lower detection thresholds. The EPA's UCMR5 program identified PFAS contamination in approximately one-third of major urban water systems, leading to proposed limits of 4 parts per trillion for PFOA and PFOS. China's Ministry of Ecology and Environment published the Second List of Toxic and Hazardous Water Pollutants in June 2025, expanding industrial monitoring requirements and increasing laboratory capacity. These regulatory requirements compel water utilities and industrial facilities to invest in advanced testing infrastructure, generating consistent revenue for instrument manufacturers and service providers. The variation in standards across jurisdictions benefits testing companies by maintaining premium pricing for specialized analytical services. Wisconsin's USD 145 million PFAS investment demonstrates how state-level initiatives strengthen federal mandates, creating regional demand that supports local testing laboratories.

Rising Awareness About Waterborne Diseases and Public Health Concerns

Water quality testing has undergone a significant transformation, moving beyond basic regulatory requirements to become a vital tool in predicting and preventing disease outbreaks. Modern testing protocols now incorporate sophisticated pathogen monitoring and antimicrobial resistance gene detection methods. The widespread implementation of COVID-19 wastewater surveillance programs, particularly through advanced systems such as Cepheid's automated PCR testing platforms, has proven the practical value of water-based epidemiological monitoring. This fundamental change from reactive compliance to proactive health monitoring has generated substantial market opportunities for real-time testing systems and comprehensive data analytics platforms. By combining IoT sensor technology with sophisticated cloud analytics capabilities, organizations can now maintain round-the-clock monitoring that identifies contamination incidents significantly faster than conventional sampling approaches. This enhanced early detection capability provides municipalities with concrete justification for investing in advanced monitoring systems. The market continues to show robust growth through innovative applications, including pharmaceutical residue monitoring programs in Brazil and comprehensive antimicrobial resistance surveillance, highlighting the industry's progression toward complete environmental health monitoring solutions.

High Cost of Advanced Water Testing Equipment and Technologies

Capital intensity of modern analytical instrumentation creates adoption barriers, particularly for smaller utilities and developing market participants who struggle to justify investments in LC-MS/MS systems that can exceed USD 500,000 per unit. Georgia's DWSRF program reduced per-project funding caps from USD 25 million to USD 10 million and implemented annual loan funding limits, reflecting budget constraints that force utilities to prioritize essential infrastructure over advanced monitoring capabilities . This cost pressure drives demand for service-based models and equipment leasing arrangements, but limits market penetration for cutting-edge technologies. The economic challenge is compounded by ongoing operational costs, including consumables, maintenance, and skilled operator requirements that can represent 40-60% of total cost of ownership over equipment lifecycles. Waters Corporation's emphasis on reducing user errors by up to 40% through improved LC technology addresses operational efficiency concerns, but the fundamental capital barrier remains significant for many potential users.

Other drivers and restraints analyzed in the detailed report include:

Increasing Focus on Sustainable Water Management and Resource ConservationDevelopment and Adoption of Portable, Easy-to-Use Water Testing KitsComplex and Heterogeneous Water Quality Regulations Across Countries

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Chemical tests dominate the market with a 37.02% share in 2025, as industries face increasingly complex requirements for detecting contaminants and emerging pollutants. This dominance reflects the need for sophisticated analytical methods to meet regulatory standards, particularly with the implementation of EPA's Method 1633, which now requires monitoring of 40 PFAS compounds. Additionally, China's Second List of Toxic and Hazardous Water Pollutants has expanded the scope of industrial chemicals that require regular monitoring.

While physical tests remain essential for basic compliance monitoring across industries, microbiological testing has emerged as the most dynamic segment in the market. With a robust growth rate of 6.05% CAGR through 2031, microbiological testing is gaining prominence due to increased focus on public health safety. This growth is primarily fueled by comprehensive pathogen surveillance programs and the rising importance of monitoring antimicrobial resistance in various environmental and industrial settings.

The Water Testing Market Report is Segmented by Test Type (Physical Tests, Chemical Tests, and Microbiological Tests), Technology (HPLC-Based, LC-MS/MS-based, Immunoassay-Based, and Other Technologies), and Geography (North America, Europe, Asia-Pacific, South America, and Middle East and Africa). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America holds a 33.45% market share in 2025, driven by established regulatory systems and infrastructure investments. The Clean Water State Revolving Fund has provided USD 630 billion in long-term infrastructure funding, generating consistent demand for testing services . Municipal procurement programs across states maintain steady requirements for laboratory services. While Canada and Mexico contribute through federal water quality programs and cross-border environmental initiatives, U.S. federal and state regulations remain the primary market drivers.

The Asia-Pacific water testing and analysis market is experiencing significant growth, with a projected CAGR of 6.28% through 2031. This growth is driven by the region's ongoing industrialization, increasing urban population, and evolving water quality regulations in China, India, and Southeast Asian countries. China's recent regulatory expansion, marked by the Second List of Toxic and Hazardous Water Pollutants in June 2025, has increased the demand for laboratory testing services. Similarly, India's strengthened enforcement of water quality standards and Southeast Asian countries' modernization of regulations have created new opportunities in the testing market.The European market continues to demonstrate stable performance, supported by unified EU water quality directives and national implementation programs. The region's commitment to circular economy principles and water reuse has increased demand for sophisticated monitoring systems. This is evidenced by strategic moves such as NSF's acquisition of G+S Laboratory in Germany, which added over 40 specialists to their operations. The established European laboratory networks, combined with regulatory oversight from the European Environment Agency and national authorities, maintain premium pricing for specialized testing services, particularly for emerging contaminants and industrial wastewater analysis.

List of Companies Covered in this Report:

Eurofins Scientific SE SGS SA Intertek Group plc ALS Limited Bureau Veritas SA TUV SUD Institut Merieux (Merieux NutriSciences) UL LLC Neogen Corporation NSF International Danaher Corporation (Hach) Thermo Fisher Scientific Inc. Agilent Technologies Inc. Shimadzu Corporation IDEXX Laboratories Inc. Xylem Inc. PerkinElmer Inc. Bio-Rad Laboratories Inc. Palintest Ltd (Halma plc) Randox Laboratories Ltd

Additional Benefits:

 The market estimate (ME) sheet in Excel format
 3 months of analyst support

Table of Contents:

5.3.1.2 Canada
5.3.1.3 Mexico
5.3.1.4 Rest of North America
5.3.2 Europe
5.3.2.1 Germany
5.3.2.2 United Kingdom
5.3.2.3 Italy
5.3.2.4 France
5.3.2.5 Spain
5.3.2.6 Netherlands
5.3.2.7 Poland
5.3.2.8 Belgium
5.3.2.9 Sweden
5.3.2.10 Rest of Europe
5.3.3 Asia-Pacific
5.3.3.1 China
5.3.3.2 India
5.3.3.3 Japan
5.3.3.4 Australia
5.3.3.5 Indonesia
5.3.3.6 South Korea
5.3.3.7 Thailand
5.3.3.8 Singapore
5.3.3.9 Rest of Asia-Pacific
5.3.4 South America
5.3.4.1 Brazil
5.3.4.2 Argentina
5.3.4.3 Colombia
5.3.4.4 Chile
5.3.4.5 Peru
5.3.4.6 Rest of South America
5.3.5 Middle East and Africa
5.3.5.1 South Africa
5.3.5.2 Saudi Arabia
5.3.5.3 United Arab Emirates
5.3.5.4 Nigeria
5.3.5.5 Egypt
5.3.5.6 Morocco
5.3.5.7 Turkey
5.3.5.8 Rest of Middle East and Africa

6 COMPETITIVE LANDSCAPE
6.1 Market Concentration
6.2 Strategic Moves
6.3 Market Share Analysis
6.4 Company Profiles (includes Global-level Overview, Market-level Overview, Core Segments, Financials (if available), Strategic Information, Market Rank/Share, Products and Services, Recent Developments)

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