

Global Legionella Testing Market Size study & Forecast, by Test Type (Culture, Urinary Antigen Test, DFA, PCR), by Application (Water & IVD Testing (Urine, Blood)), by End User (Hospitals, Clinics, Diagnostic Labs, Water Treatment Industries) and Regional Forecasts 2025-2035

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Abstracts

The Global Legionella Testing Market, valued at approximately USD 0.34 billion in 2024, is poised to expand at an impressive CAGR of around 8.20% over the forecast period of 2025-2035. Legionella testing has emerged as an indispensable safeguard in public health and environmental monitoring, serving as the frontline defense in identifying and mitigating outbreaks of Legionnaires' disease. This bacterial infection, often linked to contaminated water systems, can have severe public health consequences, prompting governments, healthcare providers, and industries to intensify preventive measures. The surging adoption of advanced diagnostic techniques, the tightening of regulatory standards for water safety, and heightened awareness about disease outbreaks are converging to create a fertile growth environment for this market. Furthermore, the rapid pace of urbanization and infrastructural development—often involving complex water systems—has amplified the need for regular Legionella monitoring to protect public safety and comply with international guidelines.

As waterborne disease prevention becomes a top priority, demand for rapid, accurate, and cost-efficient testing methodologies is accelerating. Hospitals, diagnostic laboratories, and water treatment facilities are increasingly investing in PCR-based testing and urinary antigen tests to obtain timely, actionable results. According to data from public health agencies, incidences of Legionnaires' disease have been climbing in recent years, driven by climate-related factors and aging water infrastructure. The

heightened focus on point-of-care diagnostics, coupled with technological breakthroughs in pathogen detection, is expected to further propel market expansion. However, the market must navigate certain restraints, including high testing costs in resource-limited settings and the shift toward alternative disinfection methods that could reduce testing frequency.

From a geographical perspective, North America currently dominates the global Legionella Testing Market, buoyed by its stringent water safety regulations, advanced healthcare infrastructure, and strong adoption of molecular diagnostics. The region's proactive approach to outbreak prevention, especially in healthcare facilities and public infrastructure, ensures a steady demand for testing services and kits. Meanwhile, Europe remains a formidable player, supported by rigorous EU directives on water quality management and the presence of established testing laboratories. The Asia Pacific region, however, is projected to witness the fastest growth during the forecast period, driven by surging urban populations, industrial expansion, and increased governmental investment in public health systems in countries like China and India. Latin America and the Middle East & Africa are also recognizing the economic and health benefits of early detection, with growing adoption of portable and on-site testing technologies in high-risk environments.

Major market player included in this report are:

Abbott Laboratories

Bio-Rad Laboratories, Inc.

Thermo Fisher Scientific Inc.

Becton, Dickinson and Company

Qiagen N.V.

Eurofins Scientific SE

IDEXX Laboratories, Inc.

Danaher Corporation

Pall Corporation

LuminUltra Technologies Ltd.

Pro-Lab Diagnostics, Inc.

Aquacert Ltd.

ALS Limited

SUEZ Water Technologies & Solutions

Merck KGaA

Global Legionella Testing Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period - 2025-2035

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for

stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

By Test Type:

Culture

Urinary Antigen Test

DFA

PCR

By Application:

Water Testing

IVD Testing (Urine, Blood)

By End User:

Hospitals

Clinics

Diagnostic Labs

Water Treatment Industries

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

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