

Global Legionella Testing Market: Analysis By Type (Culture Methods, Polymerase Chain Reaction Testing, Urinary Antigen Tests, Direct Fluorescent Antibody Tests, and Others), By Application (Water Testing, In-vitro Diagnostics Testing, and Other Applications), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2029

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Abstracts

Legionella is a bacteria that cause legionellosis, a type of pneumonia. Legionella testing is essential for assessing the risk of Legionnaires' disease outbreaks & implementing appropriate control measures to prevent transmission of disease to vulnerable groups. The legionella testing market refers to the market for products and services such as diagnostic tests, kits, reagents, instruments, etc., that are used to detect and prevent Legionella bacteria contamination in water systems. Environmental evaluations, risk management advice, and remediation services are some of the services provided by the Legionella testing sector in addition to standard water testing. The global legionella testing market value stood at US\$315.08 million in 2023, and is expected to reach US\$514.90 million by 2029.

Global legionella testing market demonstrated a consistent growth, primarily driven by growing cases of pneumonia, increasing incidences of infectious diseases, rapidly aging population, rising demand for point-of-care testing, increasing awareness about the importance of infection prevention & control after COVID-19 pandemic, rapidly expanding healthcare infrastructure in developing economies, etc. According to WHO, in Europe, Australia and the US, there are about 10–15 legionella cases detected per million population per year. Globally increased awareness of Legionnaires' disease, presence of strong laws promoting public water safety, growing focus of healthcare

facilities on patient safety, & ongoing advancements in immunodiagnostic technologies and automation are some of the prime growth factors that will continue to drive the growth of global legionella testing market. The market is expected to grow at a CAGR of 8.53% over the projected period of 2024-2029.

Market Segmentation Analysis:

By Type: The report provides the bifurcation of the global legionella testing market into five segments on the basis of type: culture methods, polymerase chain reaction testing, urinary antigen tests, direct fluorescent antibody tests, and others. The culture methods is the largest segment of global legionella testing market owing to their high specificity and sensitivity, rise in culture methods integration with newer technologies such as rapid identification testing, increasing public awareness about Legionnaires' disease, and regulatory guidelines and standards recommending the use of culture methods for Legionella testing in certain settings, such as healthcare facilities and cooling towers. The polymerase chain reaction testing is the fastest growing segment of legionella testing market owing to its quick turnaround time and precision in detecting low concentrations, growing preference for increasingly user-friendly PCR testing kits with simplified protocols and ready-to-use reagents, rising demand for rapid molecular diagnostics, and growing focus of government on public health surveillance.

By Application: The global legionella testing market, on the basis of application, can be divided into three segments, namely, water testing, in-vitro diagnostics testing, and other applications. The water testing segment is the largest and fastest growing segment of legionella testing market, driven by mandatory regulations in many countries for testing water sources in buildings with complex water systems, rising number of regulatory bodies and public health agencies mandating stringent testing and monitoring protocols, increasing demand for water testing services across industries, healthcare facilities, and public places, growing need for legionella testing in water treatment plants for ensuring safety and purity of water supplies, increased need for regular monitoring of water systems to prevent potential outbreak, and growing public emphasis on legionella risk management.

By Region: The report provides insight into the legionella testing market based on regions namely, Europe, North America, Asia Pacific, and rest of the world. North America is the largest region of global legionella testing market as a result of high diagnosis rates for Legionnaire's disease, strict water examination requirements, North America's aging population, presence of well developed healthcare systems, heightened focus on preventive measures and regular testing, and increased presence

of regulatory framework that emphasizes the importance of legionella testing for public health and safety. Also, to manage the prevalence of legionnaires diseases, the Government of the US is increasing awareness among the general public with the environmental legionella isolation techniques Evaluation (ELITE) program, which may further augment the growth of the market. Asia pacific is the fastest growing region of legionella testing market owing to rapid population growth, empowered healthcare industry, increasing awareness about available test products in the region, rapid urbanization & infrastructure development in China and India, increasing focus of government on expanding Legionella testing services, rising awareness about Legionnaires' disease, and ongoing advancements in healthcare infrastructure and diagnostics capabilities. Countries like China, Japan, and Australia are likely to have active markets for Legionella testing, especially in high-density urban areas and healthcare and hospitality industries.

Market Dynamics:

Growth Drivers: The global legionella testing market has been rapidly growing over the past few years, due to factors such as aging population, increasing legionella testing demand from hospitality sector, rising incidence of pneumonia and legionella-related illnesses, increasing focus of government on public health, aging infrastructure, etc. As buildings and their plumbing systems age, corrosion can lead to the buildup of scale and sediment, providing ideal breeding grounds for legionella. Rising demand for legionella testing in public buildings, fountains, care facilities, hospitals, and cooling towers, and increased need for regular monitoring and testing of water systems in commercial buildings, hotels, & other high-risk environments creates a continuous demand for legionella testing services and products. Furthermore, an increase in Legionella-related illnesses has led to a greater emphasis on preventive measures, with regulatory bodies imposing stricter guidelines & regulations for legionella testing and water management including regular testing & monitoring of water systems. Therefore, facilities are proactively implementing these measures to prevent outbreaks, driving the demand for Legionella testing.

Challenges: However, the global legionella testing market growth would be negatively impacted by various challenges such as increased difficulty in legionella detection, limited awareness about the disease in underdeveloped countries, etc. Interpreting legionella test results accurately and taking appropriate actions based on these results is a complex process, resulting in misinterpretation, an improper response, or unnecessary remediation efforts. Due to the complexity of these processes, smaller companies or facilities with fewer resources may find it difficult to implement thorough

Legionella testing programs, which could impede the expansion of the industry as a whole.

Trends: The global legionella testing market is projected to grow at a fast pace during the forecasted period, due to increasing adoption of water conservation practices, growing focus on adopting preventive measures, ongoing advancements in diagnostic technologies, integration of IoT, rising demand for rapid diagnostic tests, etc. Increasing number of industries, commercial buildings, and healthcare facilities are prioritizing legionella testing as part of their risk management and safety protocols, creating positive demand for preventive services, including regular testing, maintenance, and consultation, in water system safety. So, with increasing number of industries, establishing standards and best practices for legionella testing as part of their preventive measures, there is a growing focus of industries on adopting these standards, boosting the demand for legionella testing services and products. Also, water conservation practices often involve the use of complex water systems, such as rainwater harvesting systems, greywater recycling systems, and low-flow fixtures, providing additional reservoirs for Legionella bacteria to grow and increase the complexity of monitoring and managing water quality. As a result, there is a greater need for legionella testing to ensure the safety of these systems.

Impact Analysis of COVID-19 and Way Forward:

COVID-19 brought in many changes in the world in terms of reduced productivity, loss of life, business closures, closing down of factories and organizations, and shift to an online mode of work. Healthcare facilities, such as hospitals & nursing homes were hyper-focused on preventing the spread of infections throughout the pandemic. Under immense pressure during COVID-19, hospitals prioritized legionella testing to minimize the risk of hospital-acquired Legionnaires' disease adding to COVID-19 cases. So the overall impact of COVID-19 on legionella testing market tuned out to be positive, with increasing number of hospitals putting greater emphasis on water testing and hence experiencing a surge in demand for legionella testing services & devices.

Competitive Landscape:

The global legionella testing market is relatively fragmented with increasing number of large and medium sized players accounting for the majority of market revenue. The key players of the global legionella testing market are:

F. Hoffmann-La Roche Ltd

Abbott Laboratories
Merck KGaA
Bio-Rad Laboratories, Inc.
Becton, Dickinson and Company
QuidelOrtho Corporation
Thermo Fisher Scientific Inc.
IDEXX Laboratories, Inc.
Qiagen
Takara Bio Inc.
Eiken Chemical Co., Ltd.
AquaCert Ltd
Pro Lab Diagnostics Inc.

Major players in the market are engaged in expanding their product portfolio to accommodate advanced testing methods such as UAT and PCR, and implement strategic initiatives, such as a merger, new product launches, acquisitions, etc., to help them strengthen their market position. For instance, on December 07, 2021, Pace Analytical Services, announced that the company has acquired Special Pathogens Laboratory, a Legionella testing, detection, remediation, and prevention company. Startups prioritizing agility, innovation, and customer-centricity are also changing market & raising competition, certainly leading to better risk management techniques and public health results. Also, innovative entrepreneurs have used technological breakthroughs to challenge existing players of traditional testing methods in the highly competitive market sector inside the startup ecosystem. Increasing number of startups are introducing new testing solutions, like IoT-enabled monitoring devices, AI-powered analytics platforms, and quick testing kits.

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