

Global PFAS Analysis Workflow & Testing Solution Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global PFAS Analysis Workflow & Testing Solution market size is expected to reach \$ 6737 million by 2032, rising at a market growth of 8.9% CAGR during the forecast period (2026-2032).

PFAS analysis workflow and testing solutions refer to the integrated systems encompassing sample preparation, instrumentation, data analysis software, and consumables designed for the detection, identification, and quantification of per- and polyfluoroalkyl substances (PFAS) in various matrices including water, soil, air, food, and biological samples. Unlike single-instrument approaches, these workflows provide end-to-end solutions from sample collection to regulatory reporting, addressing the unique analytical challenges posed by PFAS—including ultra-low detection limits (sub-ng/L), wide polarity ranges, and background contamination risks. Key technologies include liquid chromatography-tandem mass spectrometry (LC-MS/MS) for targeted analysis, high-resolution mass spectrometry (HRMS) for non-targeted screening, combustion ion chromatography (CIC) for total fluorine measurement, and automated solid-phase extraction (SPE) for sample preparation. From a value chain perspective, upstream includes analytical instrument manufacturers (mass spectrometers, chromatographs), consumables suppliers (columns, SPE cartridges, reference standards), and software developers; midstream involves workflow integration, method validation, and testing services; downstream demand spans environmental testing laboratories, government agencies, water utilities, food and beverage manufacturers, and clinical research institutions. In 2025, the gross margins generally range from 25% to 50%, driven by instrumentation R&D costs, regulatory compliance requirements, and consumables recurring revenue models.

The PFAS analysis workflow and testing solution market is experiencing explosive

growth driven by the rapid expansion of global regulatory frameworks for PFAS monitoring. In April 2024, the United States implemented its first-ever National Primary Drinking Water Regulation for PFAS, establishing Maximum Contaminant Levels for PFOA and PFOS at 4.0 parts per trillion. Similarly, the European Union is progressing toward a comprehensive PFAS restriction under REACH, while China has included PFAS in its List of Key Controlled New Pollutants (2023 Edition) and published multiple environmental testing standards. These regulatory drivers have created urgent demand for reliable, high-sensitivity testing solutions capable of meeting sub-ng/L detection limits.

Another key trend is the increasing adoption of automated sample preparation workflows to improve laboratory productivity and reduce background contamination. Traditional manual solid-phase extraction methods are time-consuming and prone to PFAS contamination from laboratory materials. Automated online SPE systems now enable direct injection of large-volume water samples (up to 20mL) with seamless switching between online SPE and conventional LC operation, increasing sample throughput approximately 6.5-fold while eliminating manual handling errors.

This report studies the global PFAS Analysis Workflow & Testing Solution demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for PFAS Analysis Workflow & Testing Solution, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of PFAS Analysis Workflow & Testing Solution that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global PFAS Analysis Workflow & Testing Solution total market, 2021-2032, (USD Million)

Global PFAS Analysis Workflow & Testing Solution total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: PFAS Analysis Workflow & Testing Solution total market, key domestic companies, and share, (USD Million)

Global PFAS Analysis Workflow & Testing Solution revenue by player, revenue and market share 2021-2026, (USD Million)

Global PFAS Analysis Workflow & Testing Solution total market by Type, CAGR, 2021-2032, (USD Million)

Global PFAS Analysis Workflow & Testing Solution total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global PFAS Analysis Workflow & Testing Solution market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Thermo Fisher Scientific Inc., Agilent Technologies, Inc., Waters Corporation, Shimadzu Corporation, SCIEX, PerkinElmer, Inc., Merck KGaA, Sartorius AG, Nutech Instruments Inc., GL Sciences Inc., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world PFAS Analysis Workflow & Testing Solution market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global PFAS Analysis Workflow & Testing Solution Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global PFAS Analysis Workflow & Testing Solution Market, Segmentation by Type:

Manual Preparation Workflow

Automated SPE Workflow

Fully Integrated Online SPE-LC-MS/MS

Global PFAS Analysis Workflow & Testing Solution Market, Segmentation by Throughput / Scale:

Low Throughput (R&D, Method Development)

Medium Throughput (Contract Labs)

High Throughput (Regulatory Monitoring)

Global PFAS Analysis Workflow & Testing Solution Market, Segmentation by Water Volume Sample Type:

Direct Injection (? 100 ?L)

Large Volume SPE (250 mL ? 1 L)

Ultra-Large Volume SPE (> 1 L)

Global PFAS Analysis Workflow & Testing Solution Market, Segmentation by Application:

Commercial Environmental Labs

Government & Regulatory Agencies

Water Utilities

Food & Beverage Manufacturers

Research & Academic Institutions

Companies Profiled:

Thermo Fisher Scientific Inc.

Agilent Technologies, Inc.

Waters Corporation

Shimadzu Corporation

SCIEX

PerkinElmer, Inc.

Merck KGaA

Sartorius AG

Nutech Instruments Inc.

GL Sciences Inc.

Eurofins Scientific

Bruker Corporation

Key Questions Answered

1. How big is the global PFAS Analysis Workflow & Testing Solution market?
2. What is the demand of the global PFAS Analysis Workflow & Testing Solution market?
3. What is the year over year growth of the global PFAS Analysis Workflow & Testing

Solution market?

4. What is the total value of the global PFAS Analysis Workflow & Testing Solution market?

5. Who are the Major Players in the global PFAS Analysis Workflow & Testing Solution market?

6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 PFAS Analysis Workflow & Testing Solution Introduction
- 1.2 World PFAS Analysis Workflow & Testing Solution Market Size & Forecast (2021 & 2025 & 2032)
- 1.3 World PFAS Analysis Workflow & Testing Solution Total Market by Region (by Headquarter Location)
 - 1.3.1 World PFAS Analysis Workflow & Testing Solution Market Size by Region (2021-2032), (by Headquarter Location)
 - 1.3.2 United States Based Company PFAS Analysis Workflow & Testing Solution Revenue (2021-2032)
 - 1.3.3 China Based Company PFAS Analysis Workflow & Testing Solution Revenue (2021-2032)
 - 1.3.4 Europe Based Company PFAS Analysis Workflow & Testing Solution Revenue (2021-2032)
 - 1.3.5 Japan Based Company PFAS Analysis Workflow & Testing Solution Revenue (2021-2032)
 - 1.3.6 South Korea Based Company PFAS Analysis Workflow & Testing Solution Revenue (2021-2032)
 - 1.3.7 ASEAN Based Company PFAS Analysis Workflow & Testing Solution Revenue (2021-2032)
 - 1.3.8 India Based Company PFAS Analysis Workflow & Testing Solution Revenue (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 PFAS Analysis Workflow & Testing Solution Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Major Market Trends

2 DEMAND SUMMARY

- 2.1 World PFAS Analysis Workflow & Testing Solution Consumption Value (2021-2032)
- 2.2 World PFAS Analysis Workflow & Testing Solution Consumption Value by Region
 - 2.2.1 World PFAS Analysis Workflow & Testing Solution Consumption Value by Region (2021-2026)
 - 2.2.2 World PFAS Analysis Workflow & Testing Solution Consumption Value Forecast by Region (2027-2032)
- 2.3 United States PFAS Analysis Workflow & Testing Solution Consumption Value

(2021-2032)

2.4 China PFAS Analysis Workflow & Testing Solution Consumption Value (2021-2032)

2.5 Europe PFAS Analysis Workflow & Testing Solution Consumption Value
(2021-2032)

2.6 Japan PFAS Analysis Workflow & Testing Solution Consumption Value (2021-2032)

2.7 South Korea PFAS Analysis Workflow & Testing Solution Consumption Value
(2021-2032)

2.8 ASEAN PFAS Analysis Workflow & Testing Solution Consumption Value
(2021-2032)

2.9 India PFAS Analysis Workflow & Testing Solution Consumption Value (2021-2032)

3 WORLD PFAS ANALYSIS WORKFLOW & TESTING SOLUTION COMPANIES COMPETITIVE ANALYSIS

3.1 World PFAS Analysis Workflow & Testing Solution Revenue by Player (2021-2026)

3.2 Industry Rank and Concentration Rate (CR)

3.2.1 Global PFAS Analysis Workflow & Testing Solution Industry Rank of Major
Players

3.2.2 Global Concentration Ratios (CR4) for PFAS Analysis Workflow & Testing
Solution in 2025

3.2.3 Global Concentration Ratios (CR8) for PFAS Analysis Workflow & Testing
Solution in 2025

3.3 PFAS Analysis Workflow & Testing Solution Company Evaluation Quadrant

3.4 PFAS Analysis Workflow & Testing Solution Market: Overall Company Footprint
Analysis

3.4.1 PFAS Analysis Workflow & Testing Solution Market: Region Footprint

3.4.2 PFAS Analysis Workflow & Testing Solution Market: Company Product Type
Footprint

3.4.3 PFAS Analysis Workflow & Testing Solution Market: Company Product Application
Footprint

3.5 Competitive Environment

3.5.1 Historical Structure of the Industry

3.5.2 Barriers of Market Entry

3.5.3 Factors of Competition

3.6 Mergers & Acquisitions Activity

4 UNITED STATES VS CHINA VS REST OF WORLD (BY HEADQUARTER LOCATION)

4.1 United States VS China: PFAS Analysis Workflow & Testing Solution Revenue Comparison (by Headquarter Location)

4.1.1 United States VS China: PFAS Analysis Workflow & Testing Solution Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)

4.1.2 United States VS China: PFAS Analysis Workflow & Testing Solution Revenue Market Share Comparison (2021 & 2025 & 2032)

4.2 United States Based Companies VS China Based Companies: PFAS Analysis Workflow & Testing Solution Consumption Value Comparison

4.2.1 United States VS China: PFAS Analysis Workflow & Testing Solution Consumption Value Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: PFAS Analysis Workflow & Testing Solution Consumption Value Market Share Comparison (2021 & 2025 & 2032)

4.3 United States Based PFAS Analysis Workflow & Testing Solution Companies and Market Share, 2021-2026

4.3.1 United States Based PFAS Analysis Workflow & Testing Solution Companies, Headquarters (States, Country)

4.3.2 United States Based Companies PFAS Analysis Workflow & Testing Solution Revenue, (2021-2026)

4.4 China Based Companies PFAS Analysis Workflow & Testing Solution Revenue and Market Share, 2021-2026

4.4.1 China Based PFAS Analysis Workflow & Testing Solution Companies, Company Headquarters (Province, Country)

4.4.2 China Based Companies PFAS Analysis Workflow & Testing Solution Revenue, (2021-2026)

4.5 Rest of World Based PFAS Analysis Workflow & Testing Solution Companies and Market Share, 2021-2026

4.5.1 Rest of World Based PFAS Analysis Workflow & Testing Solution Companies, Headquarters (Province, Country)

4.5.2 Rest of World Based Companies PFAS Analysis Workflow & Testing Solution Revenue (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World PFAS Analysis Workflow & Testing Solution Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Manual Preparation Workflow

5.2.2 Automated SPE Workflow

5.2.3 Fully Integrated Online SPE-LC-MS/MS

5.3 Market Segment by Type

5.3.1 World PFAS Analysis Workflow & Testing Solution Market Size by Type (2021-2026)

5.3.2 World PFAS Analysis Workflow & Testing Solution Market Size by Type (2027-2032)

5.3.3 World PFAS Analysis Workflow & Testing Solution Market Size Market Share by Type (2027-2032)

6 MARKET ANALYSIS BY THROUGHPUT / SCALE

6.1 World PFAS Analysis Workflow & Testing Solution Market Size Overview by Throughput / Scale: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Throughput / Scale

6.2.1 Low Throughput (R&D, Method Development)

6.2.2 Medium Throughput (Contract Labs)

6.2.3 High Throughput (Regulatory Monitoring)

6.3 Market Segment by Throughput / Scale

6.3.1 World PFAS Analysis Workflow & Testing Solution Market Size by Throughput / Scale (2021-2026)

6.3.2 World PFAS Analysis Workflow & Testing Solution Market Size by Throughput / Scale (2027-2032)

6.3.3 World PFAS Analysis Workflow & Testing Solution Market Size Market Share by Throughput / Scale (2027-2032)

7 MARKET ANALYSIS BY WATER VOLUME SAMPLE TYPE

7.1 World PFAS Analysis Workflow & Testing Solution Market Size Overview by Water Volume Sample Type: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Water Volume Sample Type

7.2.1 Direct Injection (? 100 ?L)

7.2.2 Large Volume SPE (250 mL ? 1 L)

7.2.3 Ultra-Large Volume SPE (> 1 L)

7.3 Market Segment by Water Volume Sample Type

7.3.1 World PFAS Analysis Workflow & Testing Solution Market Size by Water Volume Sample Type (2021-2026)

7.3.2 World PFAS Analysis Workflow & Testing Solution Market Size by Water Volume Sample Type (2027-2032)

7.3.3 World PFAS Analysis Workflow & Testing Solution Market Size Market Share by Water Volume Sample Type (2027-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World PFAS Analysis Workflow & Testing Solution Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Commercial Environmental Labs

8.2.2 Government & Regulatory Agencies

8.2.3 Water Utilities

8.2.4 Food & Beverage Manufacturers

8.2.5 Research & Academic Institutions

8.3 Market Segment by Application

8.3.1 World PFAS Analysis Workflow & Testing Solution Market Size by Application (2021-2026)

8.3.2 World PFAS Analysis Workflow & Testing Solution Market Size by Application (2027-2032)

8.3.3 World PFAS Analysis Workflow & Testing Solution Market Size Market Share by Application (2021-2032)

9 COMPANY PROFILES

9.1 Thermo Fisher Scientific Inc.

9.1.1 Thermo Fisher Scientific Inc. Details

9.1.2 Thermo Fisher Scientific Inc. Major Business

9.1.3 Thermo Fisher Scientific Inc. PFAS Analysis Workflow & Testing Solution Product and Services

9.1.4 Thermo Fisher Scientific Inc. PFAS Analysis Workflow & Testing Solution Revenue, Gross Margin and Market Share (2021-2026)

9.1.5 Thermo Fisher Scientific Inc. Recent Developments/Updates

9.1.6 Thermo Fisher Scientific Inc. Competitive Strengths & Weaknesses

9.2 Agilent Technologies, Inc.

9.2.1 Agilent Technologies, Inc. Details

9.2.2 Agilent Technologies, Inc. Major Business

9.2.3 Agilent Technologies, Inc. PFAS Analysis Workflow & Testing Solution Product and Services

9.2.4 Agilent Technologies, Inc. PFAS Analysis Workflow & Testing Solution Revenue, Gross Margin and Market Share (2021-2026)

9.2.5 Agilent Technologies, Inc. Recent Developments/Updates

9.2.6 Agilent Technologies, Inc. Competitive Strengths & Weaknesses

9.3 Waters Corporation

9.3.1 Waters Corporation Details

9.3.2 Waters Corporation Major Business

9.3.3 Waters Corporation PFAS Analysis Workflow & Testing Solution Product and Services

9.3.4 Waters Corporation PFAS Analysis Workflow & Testing Solution Revenue, Gross Margin and Market Share (2021-2026)

9.3.5 Waters Corporation Recent Developments/Updates

9.3.6 Waters Corporation Competitive Strengths & Weaknesses

9.4 Shimadzu Corporation

9.4.1 Shimadzu Corporation Details

9.4.2 Shimadzu Corporation Major Business

9.4.3 Shimadzu Corporation PFAS Analysis Workflow & Testing Solution Product and Services

9.4.4 Shimadzu Corporation PFAS Analysis Workflow & Testing Solution Revenue, Gross Margin and Market Share (2021-2026)

9.4.5 Shimadzu Corporation Recent Developments/Updates

9.4.6 Shimadzu Corporation Competitive Strengths & Weaknesses

9.5 SCIEX

9.5.1 SCIEX Details

9.5.2 SCIEX Major Business

9.5.3 SCIEX PFAS Analysis Workflow & Testing Solution Product and Services

9.5.4 SCIEX PFAS Analysis Workflow & Testing Solution Revenue, Gross Margin and Market Share (2021-2026)

9.5.5 SCIEX Recent Developments/Updates

9.5.6 SCIEX Competitive Strengths & Weaknesses

9.6 PerkinElmer, Inc.

9.6.1 PerkinElmer, Inc. Details

9.6.2 PerkinElmer, Inc. Major Business

9.6.3 PerkinElmer, Inc. PFAS Analysis Workflow & Testing Solution Product and Services

9.6.4 PerkinElmer, Inc. PFAS Analysis Workflow & Testing Solution Revenue, Gross Margin and Market Share (2021-2026)

9.6.5 PerkinElmer, Inc. Recent Developments/Updates

9.6.6 PerkinElmer, Inc. Competitive Strengths & Weaknesses

9.7 Merck KGaA

9.7.1 Merck KGaA Details

9.7.2 Merck KGaA Major Business

9.7.3 Merck KGaA PFAS Analysis Workflow & Testing Solution Product and Services

- 9.7.4 Merck KGaA PFAS Analysis Workflow & Testing Solution Revenue, Gross Margin and Market Share (2021-2026)
- 9.7.5 Merck KGaA Recent Developments/Updates
- 9.7.6 Merck KGaA Competitive Strengths & Weaknesses
- 9.8 Sartorius AG
 - 9.8.1 Sartorius AG Details
 - 9.8.2 Sartorius AG Major Business
 - 9.8.3 Sartorius AG PFAS Analysis Workflow & Testing Solution Product and Services
 - 9.8.4 Sartorius AG PFAS Analysis Workflow & Testing Solution Revenue, Gross Margin and Market Share (2021-2026)
 - 9.8.5 Sartorius AG Recent Developments/Updates
 - 9.8.6 Sartorius AG Competitive Strengths & Weaknesses
- 9.9 Nutech Instruments Inc.
 - 9.9.1 Nutech Instruments Inc. Details
 - 9.9.2 Nutech Instruments Inc. Major Business
 - 9.9.3 Nutech Instruments Inc. PFAS Analysis Workflow & Testing Solution Product and Services
 - 9.9.4 Nutech Instruments Inc. PFAS Analysis Workflow & Testing Solution Revenue, Gross Margin and Market Share (2021-2026)
 - 9.9.5 Nutech Instruments Inc. Recent Developments/Updates
 - 9.9.6 Nutech Instruments Inc. Competitive Strengths & Weaknesses
- 9.10 GL Sciences Inc.
 - 9.10.1 GL Sciences Inc. Details
 - 9.10.2 GL Sciences Inc. Major Business
 - 9.10.3 GL Sciences Inc. PFAS Analysis Workflow & Testing Solution Product and Services
 - 9.10.4 GL Sciences Inc. PFAS Analysis Workflow & Testing Solution Revenue, Gross Margin and Market Share (2021-2026)
 - 9.10.5 GL Sciences Inc. Recent Developments/Updates
 - 9.10.6 GL Sciences Inc. Competitive Strengths & Weaknesses
- 9.11 Eurofins Scientific
 - 9.11.1 Eurofins Scientific Details
 - 9.11.2 Eurofins Scientific Major Business
 - 9.11.3 Eurofins Scientific PFAS Analysis Workflow & Testing Solution Product and Services
 - 9.11.4 Eurofins Scientific PFAS Analysis Workflow & Testing Solution Revenue, Gross Margin and Market Share (2021-2026)
 - 9.11.5 Eurofins Scientific Recent Developments/Updates
 - 9.11.6 Eurofins Scientific Competitive Strengths & Weaknesses

9.12 Bruker Corporation

9.12.1 Bruker Corporation Details

9.12.2 Bruker Corporation Major Business

9.12.3 Bruker Corporation PFAS Analysis Workflow & Testing Solution Product and Services

9.12.4 Bruker Corporation PFAS Analysis Workflow & Testing Solution Revenue, Gross Margin and Market Share (2021-2026)

9.12.5 Bruker Corporation Recent Developments/Updates

9.12.6 Bruker Corporation Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 PFAS Analysis Workflow & Testing Solution Industry Chain

10.2 PFAS Analysis Workflow & Testing Solution Upstream Analysis

10.3 PFAS Analysis Workflow & Testing Solution Midstream Analysis

10.4 PFAS Analysis Workflow & Testing Solution Downstream Analysis

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

- Table 1. World PFAS Analysis Workflow & Testing Solution Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)
- Table 2. World PFAS Analysis Workflow & Testing Solution Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)
- Table 3. World PFAS Analysis Workflow & Testing Solution Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)
- Table 4. World PFAS Analysis Workflow & Testing Solution Revenue Market Share by Region (2021-2026), (by Headquarter Location)
- Table 5. World PFAS Analysis Workflow & Testing Solution Revenue Market Share by Region (2027-2032), (by Headquarter Location)
- Table 6. Major Market Trends
- Table 7. World PFAS Analysis Workflow & Testing Solution Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)
- Table 8. World PFAS Analysis Workflow & Testing Solution Consumption Value by Region (2021-2026) & (USD Million)
- Table 9. World PFAS Analysis Workflow & Testing Solution Consumption Value Forecast by Region (2027-2032) & (USD Million)
- Table 10. World PFAS Analysis Workflow & Testing Solution Revenue by Player (2021-2026) & (USD Million)
- Table 11. Revenue Market Share of Key PFAS Analysis Workflow & Testing Solution Players in 2025
- Table 12. World PFAS Analysis Workflow & Testing Solution Industry Rank of Major Player, Based on Revenue in 2025
- Table 13. Global PFAS Analysis Workflow & Testing Solution Company Evaluation Quadrant
- Table 14. Head Office of Key PFAS Analysis Workflow & Testing Solution Players
- Table 15. PFAS Analysis Workflow & Testing Solution Market: Company Product Type Footprint
- Table 16. PFAS Analysis Workflow & Testing Solution Market: Company Product Application Footprint
- Table 17. PFAS Analysis Workflow & Testing Solution Mergers & Acquisitions Activity
- Table 18. United States VS China PFAS Analysis Workflow & Testing Solution Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)
- Table 19. United States VS China PFAS Analysis Workflow & Testing Solution Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 20. United States Based PFAS Analysis Workflow & Testing Solution Companies, Headquarters (States, Country)

Table 21. United States Based Companies PFAS Analysis Workflow & Testing Solution Revenue, (2021-2026) & (USD Million)

Table 22. United States Based Companies PFAS Analysis Workflow & Testing Solution Revenue Market Share (2021-2026)

Table 23. China Based PFAS Analysis Workflow & Testing Solution Companies, Headquarters (Province, Country)

Table 24. China Based Companies PFAS Analysis Workflow & Testing Solution Revenue, (2021-2026) & (USD Million)

Table 25. China Based Companies PFAS Analysis Workflow & Testing Solution Revenue Market Share (2021-2026)

Table 26. Rest of World Based PFAS Analysis Workflow & Testing Solution Companies, Headquarters (Province, Country)

Table 27. Rest of World Based Companies PFAS Analysis Workflow & Testing Solution Revenue (2021-2026) & (USD Million)

Table 28. Rest of World Based Companies PFAS Analysis Workflow & Testing Solution Revenue Market Share (2021-2026)

Table 29. World PFAS Analysis Workflow & Testing Solution Market Size by Type, (USD Million), 2021 & 2025 & 2032

Table 30. World PFAS Analysis Workflow & Testing Solution Market Size Value by Type (2021-2026) & (USD Million)

Table 31. World PFAS Analysis Workflow & Testing Solution Market Size by Type (2027-2032) & (USD Million)

Table 32. World PFAS Analysis Workflow & Testing Solution Market Size by Throughput / Scale, (USD Million), 2021 & 2025 & 2032

Table 33. World PFAS Analysis Workflow & Testing Solution Market Size Value by Throughput / Scale (2021-2026) & (USD Million)

Table 34. World PFAS Analysis Workflow & Testing Solution Market Size by Throughput / Scale (2027-2032) & (USD Million)

Table 35. World PFAS Analysis Workflow & Testing Solution Market Size by Water Volume Sample Type, (USD Million), 2021 & 2025 & 2032

Table 36. World PFAS Analysis Workflow & Testing Solution Market Size Value by Water Volume Sample Type (2021-2026) & (USD Million)

Table 37. World PFAS Analysis Workflow & Testing Solution Market Size by Water Volume Sample Type (2027-2032) & (USD Million)

Table 38. World PFAS Analysis Workflow & Testing Solution Market Size by Application, (USD Million), 2021 & 2025 & 2032

Table 39. World PFAS Analysis Workflow & Testing Solution Market Size by Application

(2021-2026) & (USD Million)

Table 40. World PFAS Analysis Workflow & Testing Solution Market Size by Application
(2027-2032) & (USD Million)

Table 41. Thermo Fisher Scientific Inc. Basic Information, Manufacturing Base and Competitors

Table 42. Thermo Fisher Scientific Inc. Major Business

Table 43. Thermo Fisher Scientific Inc. PFAS Analysis Workflow & Testing Solution Product and Services

Table 44. Thermo Fisher Scientific Inc. PFAS Analysis Workflow & Testing Solution Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 45. Thermo Fisher Scientific Inc. Recent Developments/Updates

Table 46. Thermo Fisher Scientific Inc. Competitive Strengths & Weaknesses

Table 47. Agilent Technologies, Inc. Basic Information, Manufacturing Base and Competitors

Table 48. Agilent Technologies, Inc. Major Business

Table 49. Agilent Technologies, Inc. PFAS Analysis Workflow & Testing Solution Product and Services

Table 50. Agilent Technologies, Inc. PFAS Analysis Workflow & Testing Solution Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 51. Agilent Technologies, Inc. Recent Developments/Updates

Table 52. Agilent Technologies, Inc. Competitive Strengths & Weaknesses

Table 53. Waters Corporation Basic Information, Manufacturing Base and Competitors

Table 54. Waters Corporation Major Business

Table 55. Waters Corporation PFAS Analysis Workflow & Testing Solution Product and Services

Table 56. Waters Corporation PFAS Analysis Workflow & Testing Solution Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 57. Waters Corporation Recent Developments/Updates

Table 58. Waters Corporation Competitive Strengths & Weaknesses

Table 59. Shimadzu Corporation Basic Information, Manufacturing Base and Competitors

Table 60. Shimadzu Corporation Major Business

Table 61. Shimadzu Corporation PFAS Analysis Workflow & Testing Solution Product and Services

Table 62. Shimadzu Corporation PFAS Analysis Workflow & Testing Solution Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 63. Shimadzu Corporation Recent Developments/Updates

Table 64. Shimadzu Corporation Competitive Strengths & Weaknesses

Table 65. SCIEX Basic Information, Manufacturing Base and Competitors

Table 66. SCIEX Major Business

Table 67. SCIEX PFAS Analysis Workflow & Testing Solution Product and Services

Table 68. SCIEX PFAS Analysis Workflow & Testing Solution Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 69. SCIEX Recent Developments/Updates

Table 70. SCIEX Competitive Strengths & Weaknesses

Table 71. PerkinElmer, Inc. Basic Information, Manufacturing Base and Competitors

Table 72. PerkinElmer, Inc. Major Business

Table 73. PerkinElmer, Inc. PFAS Analysis Workflow & Testing Solution Product and Services

Table 74. PerkinElmer, Inc. PFAS Analysis Workflow & Testing Solution Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 75. PerkinElmer, Inc. Recent Developments/Updates

Table 76. PerkinElmer, Inc. Competitive Strengths & Weaknesses

Table 77. Merck KGaA Basic Information, Manufacturing Base and Competitors

Table 78. Merck KGaA Major Business

Table 79. Merck KGaA PFAS Analysis Workflow & Testing Solution Product and Services

Table 80. Merck KGaA PFAS Analysis Workflow & Testing Solution Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 81. Merck KGaA Recent Developments/Updates

Table 82. Merck KGaA Competitive Strengths & Weaknesses

Table 83. Sartorius AG Basic Information, Manufacturing Base and Competitors

Table 84. Sartorius AG Major Business

Table 85. Sartorius AG PFAS Analysis Workflow & Testing Solution Product and Services

Table 86. Sartorius AG PFAS Analysis Workflow & Testing Solution Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 87. Sartorius AG Recent Developments/Updates

Table 88. Sartorius AG Competitive Strengths & Weaknesses

Table 89. Nutech Instruments Inc. Basic Information, Manufacturing Base and Competitors

Table 90. Nutech Instruments Inc. Major Business

Table 91. Nutech Instruments Inc. PFAS Analysis Workflow & Testing Solution Product and Services

Table 92. Nutech Instruments Inc. PFAS Analysis Workflow & Testing Solution Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 93. Nutech Instruments Inc. Recent Developments/Updates

Table 94. Nutech Instruments Inc. Competitive Strengths & Weaknesses

Table 95. GL Sciences Inc. Basic Information, Manufacturing Base and Competitors

Table 96. GL Sciences Inc. Major Business

Table 97. GL Sciences Inc. PFAS Analysis Workflow & Testing Solution Product and Services

Table 98. GL Sciences Inc. PFAS Analysis Workflow & Testing Solution Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 99. GL Sciences Inc. Recent Developments/Updates

Table 100. GL Sciences Inc. Competitive Strengths & Weaknesses

Table 101. Eurofins Scientific Basic Information, Manufacturing Base and Competitors

Table 102. Eurofins Scientific Major Business

Table 103. Eurofins Scientific PFAS Analysis Workflow & Testing Solution Product and Services

Table 104. Eurofins Scientific PFAS Analysis Workflow & Testing Solution Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 105. Eurofins Scientific Recent Developments/Updates

Table 106. Eurofins Scientific Competitive Strengths & Weaknesses

Table 107. Bruker Corporation Basic Information, Manufacturing Base and Competitors

Table 108. Bruker Corporation Major Business

Table 109. Bruker Corporation PFAS Analysis Workflow & Testing Solution Product and Services

Table 110. Bruker Corporation PFAS Analysis Workflow & Testing Solution Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 111. Bruker Corporation Recent Developments/Updates

Table 112. Bruker Corporation Competitive Strengths & Weaknesses

Table 113. Global Key Players of PFAS Analysis Workflow & Testing Solution Upstream (Raw Materials)

Table 114. Global PFAS Analysis Workflow & Testing Solution Typical Customers

List Of Figures

LIST OF FIGURES

Figure 1. PFAS Analysis Workflow & Testing Solution Picture

Figure 2. World PFAS Analysis Workflow & Testing Solution Total Revenue: 2021 & 2025 & 2032, (USD Million)

Figure 3. World PFAS Analysis Workflow & Testing Solution Total Revenue (2021-2032) & (USD Million)

Figure 4. World PFAS Analysis Workflow & Testing Solution Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Figure 5. World PFAS Analysis Workflow & Testing Solution Revenue Market Share by Region (2021-2032), (by Headquarter Location)

Figure 6. United States Based Company PFAS Analysis Workflow & Testing Solution Revenue (2021-2032) & (USD Million)

Figure 7. China Based Company PFAS Analysis Workflow & Testing Solution Revenue (2021-2032) & (USD Million)

Figure 8. Europe Based Company PFAS Analysis Workflow & Testing Solution Revenue (2021-2032) & (USD Million)

Figure 9. Japan Based Company PFAS Analysis Workflow & Testing Solution Revenue (2021-2032) & (USD Million)

Figure 10. South Korea Based Company PFAS Analysis Workflow & Testing Solution Revenue (2021-2032) & (USD Million)

Figure 11. ASEAN Based Company PFAS Analysis Workflow & Testing Solution Revenue (2021-2032) & (USD Million)

Figure 12. India Based Company PFAS Analysis Workflow & Testing Solution Revenue (2021-2032) & (USD Million)

Figure 13. PFAS Analysis Workflow & Testing Solution Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World PFAS Analysis Workflow & Testing Solution Consumption Value (2021-2032) & (USD Million)

Figure 16. World PFAS Analysis Workflow & Testing Solution Consumption Value Market Share by Region (2021-2032)

Figure 17. United States PFAS Analysis Workflow & Testing Solution Consumption Value (2021-2032) & (USD Million)

Figure 18. China PFAS Analysis Workflow & Testing Solution Consumption Value (2021-2032) & (USD Million)

Figure 19. Europe PFAS Analysis Workflow & Testing Solution Consumption Value (2021-2032) & (USD Million)

Figure 20. Japan PFAS Analysis Workflow & Testing Solution Consumption Value (2021-2032) & (USD Million)

Figure 21. South Korea PFAS Analysis Workflow & Testing Solution Consumption Value (2021-2032) & (USD Million)

Figure 22. ASEAN PFAS Analysis Workflow & Testing Solution Consumption Value (2021-2032) & (USD Million)

Figure 23. India PFAS Analysis Workflow & Testing Solution Consumption Value (2021-2032) & (USD Million)

Figure 24. Producer Shipments of PFAS Analysis Workflow & Testing Solution by Player Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for PFAS Analysis Workflow & Testing Solution Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for PFAS Analysis Workflow & Testing Solution Markets in 2025

Figure 27. United States VS China: PFAS Analysis Workflow & Testing Solution Revenue Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: PFAS Analysis Workflow & Testing Solution Consumption Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. World PFAS Analysis Workflow & Testing Solution Market Size by Type, (USD Million), 2021 & 2025 & 2032

Figure 30. World PFAS Analysis Workflow & Testing Solution Market Size Market Share by Type in 2025

Figure 31. Manual Preparation Workflow

Figure 32. Automated SPE Workflow

Figure 33. Fully Integrated Online SPE-LC-MS/MS

Figure 34. World PFAS Analysis Workflow & Testing Solution Market Size Market Share by Type (2021-2032)

Figure 35. World PFAS Analysis Workflow & Testing Solution Market Size by Throughput / Scale, (USD Million), 2021 & 2025 & 2032

Figure 36. World PFAS Analysis Workflow & Testing Solution Market Size Market Share by Throughput / Scale in 2025

Figure 37. Low Throughput (R&D, Method Development)

Figure 38. Medium Throughput (Contract Labs)

Figure 39. High Throughput (Regulatory Monitoring)

Figure 40. World PFAS Analysis Workflow & Testing Solution Market Size Market Share by Throughput / Scale (2021-2032)

Figure 41. World PFAS Analysis Workflow & Testing Solution Market Size by Water Volume Sample Type, (USD Million), 2021 & 2025 & 2032

Figure 42. World PFAS Analysis Workflow & Testing Solution Market Size Market Share

by Water Volume Sample Type in 2025

Figure 43. Direct Injection (? 100 ?L)

Figure 44. Large Volume SPE (250 mL ? 1 L)

Figure 45. Ultra-Large Volume SPE (> 1 L)

Figure 46. World PFAS Analysis Workflow & Testing Solution Market Size Market Share by Water Volume Sample Type (2021-2032)

Figure 47. World PFAS Analysis Workflow & Testing Solution Market Size by Application, (USD Million), 2021 & 2025 & 2032

Figure 48. World PFAS Analysis Workflow & Testing Solution Market Size Market Share by Application in 2025

Figure 49. Commercial Environmental Labs

Figure 50. Government & Regulatory Agencies

Figure 51. Water Utilities

Figure 52. Food & Beverage Manufacturers

Figure 53. Research & Academic Institutions

Figure 54. World PFAS Analysis Workflow & Testing Solution Market Size Market Share by Application (2021-2032)

Figure 55. PFAS Analysis Workflow & Testing Solution Industrial Chain

Figure 56. Methodology

Figure 57. Research Process and Data Source

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