

Global PFAS Analysis Workflow & Testing Solution Market Growth (Status and Outlook) 2026-2032

<https://marketpublishers.com/r/G94168ABF493EN.html>

Date: July 2026

Pages: 112

Price: US\$ 3,660.00 (Single User License)

ID: G94168ABF493EN

Abstracts

The global PFAS Analysis Workflow & Testing Solution market size is predicted to grow from US\$ 3543 million in 2025 to US\$ 6605 million in 2032; it is expected to grow at a CAGR of 9.5% from 2026 to 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.

LPI (LP Information)' newest research report, the 'PFAS Analysis Workflow & Testing Solution Industry Forecast' looks at past sales and reviews total world PFAS Analysis Workflow & Testing Solution sales in 2025, providing a comprehensive analysis by region and market sector of projected PFAS Analysis Workflow & Testing Solution sales for 2026 through 2032. With PFAS Analysis Workflow & Testing Solution sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world PFAS Analysis Workflow & Testing Solution industry.

This Insight Report provides a comprehensive analysis of the global PFAS Analysis Workflow & Testing Solution landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on PFAS Analysis Workflow & Testing Solution portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global PFAS Analysis Workflow & Testing Solution market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for PFAS Analysis Workflow & Testing Solution and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of

bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global PFAS Analysis Workflow & Testing Solution.

This report presents a comprehensive overview, market shares, and growth opportunities of PFAS Analysis Workflow & Testing Solution market by product type, application, key players and key regions and countries.

Segmentation by Type:

Manual Preparation Workflow

Automated SPE Workflow

Fully Integrated Online SPE-LC-MS/MS

Segmentation by Throughput / Scale:

Low Throughput (R&D, Method Development)

Medium Throughput (Contract Labs)

High Throughput (Regulatory Monitoring)

Segmentation by Water Volume Sample Type:

Direct Injection (? 100 ?L)

Large Volume SPE (250 mL ? 1 L)

Ultra-Large Volume SPE (> 1 L)

Segmentation by Application:

Commercial Environmental Labs

Government & Regulatory Agencies

Water Utilities

Food & Beverage Manufacturers

Research & Academic Institutions

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

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

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