

# PFAS Testing - Company Evaluation Report, 2024

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## Abstracts

The PFAS Testing Companies Quadrant is a comprehensive industry analysis that provides valuable insights into the global market for PFAS Testing. This quadrant offers a detailed evaluation of key market players, technological advancements, product innovations, and emerging trends shaping the industry. MarketsandMarkets 360 Quadrants evaluated over 100 companies, of which the Top 14 PFAS Testing Companies were categorized and recognized as the quadrant leaders.

PFAS testing enables the detection and quantification of unknown PFAS compounds, such as PFOA, PFOS, PFNA, PFHxS, and other analytes, while also evaluating their structural and chemical characteristics within a sample. The market is experiencing growth due to rising global concern over environmental contamination and growing initiatives by public and private entities to raise environmental awareness. Additional drivers include the increasing privatization of environmental testing and treatment services, expanded investments in wastewater treatment infrastructure, more stringent regulations for pollution monitoring and control, and government-led pollution control programs promoting environmental testing.

Despite these growth drivers, the market faces certain challenges, including limited awareness in developing countries about effective pollution monitoring strategies, stringent storage protocols for PFAS testing, and the high capital requirements for achieving accurate and sensitive analysis. Worldwide regulatory reforms addressing PFAS contamination have intensified, driven by mounting concerns over their environmental persistence and potential health hazards. In the United States, the Environmental Protection Agency's (EPA) PFAS Strategic Roadmap (2021–2024) outlines action under key statutes, including the Safe Drinking Water Act (SDWA), the Toxic Substances Control Act (TSCA), and the Comprehensive Environmental Response, Compensation, and Liability Act (CERCLA), proposing maximum contaminant levels (MCLs) for drinking water and hazard designations for PFOA and

## PFOS.

The 360 Quadrant maps the PFAS Testing companies based on criteria such as revenue, geographic presence, growth strategies, investments, and sales strategies for the market presence of the PFAS Testing quadrant. The top criteria for product footprint evaluation included By Product Type (Instruments, Consumables, Software and Services), By Technique, By Method (EPA, DIN, ISO and ASTM) and By Application (Water Testing, Soil Testing, Food and Beverage Testing, Serum Testing, Air Monitoring and Microbial Testing)

### Key Players

Key players in the PFAS Testing market include major global corporations and specialized innovators such as AGILENT TECHNOLOGIES, INC., DANAHER CORPORATION, WATERS CORPORATION., THERMO FISHER SCIENTIFIC INC., SHIMADZU CORPORATION, MERCK KGAA, PERKINELMER INC., LGC LIMITED, BIOTAGE, MACHEREY-NAGEL GMBH & CO. KG, ACCUSTANDARD, WELLINGTON LABORATORIES INC., CAMBRIDGE ISOTOPE LABORATORIES, INC., CHIRON AS, and METROHM INULA GMBH. These companies are actively investing in research and development, forming strategic partnerships, and engaging in collaborative initiatives to drive innovation, expand their global footprint, and maintain a competitive edge in this rapidly evolving market.

### Top 3 Companies

Agilent Technologies, Inc.

Agilent Technologies commands a strong position in the PFAS testing market, driven by its research and development capabilities which underpin its competitive edge. The company's high-performance instruments are pivotal for accurate PFAS detection. Agilent continues to expand its market footprint through comprehensive workflow solutions aligned with EPA standards. These strategic initiatives are complemented by acquisitions that expand its analytical capabilities.

Thermo Fisher Scientific Inc.

Thermo Fisher Scientific is a key player with a diverse range of analytical instruments and consumables. The company supports fields like biotechnology, pharmaceuticals, and environmental analysis through groundbreaking chromatography and mass

spectrometry consumables. By focusing on precision and efficiency, Thermo Fisher aids laboratories in meeting stringent regulatory requirements. Strategic collaborations and acquisitions further strengthen its market footprint.

### Danaher Corporation

Danaher Corporation secures a notable market share with its extensive portfolio focused on environmental testing. The company prioritizes water analysis and advances its capabilities through both organic strategies, such as product innovations, and inorganic avenues like strategic partnerships. Subsidiaries like SCIEX and Pall Corporation are instrumental in enhancing PFAS detection technologies, keeping Danaher at the forefront of industry compliance and innovation.

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