

Wastewater Surveillance Market by Product (Instruments & Equipment (Samplers, Ultracentrifuge, qPCR, Portable), Assays & Kits, Consumables), Application (Pathogen Detection, AMR Tracking), End User (Public Health, Govt, Hospitals) - Global Forecast to 2030

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Abstracts

The global wastewater surveillance market is projected to reach USD 1.22 billion by 2030, up from an estimated USD 0.88 billion in 2025, at a CAGR of 6.7% during the forecast period. This market growth is driven by various factors, including the increasing need for early detection of public health threats, more government initiatives and funding for wastewater-based epidemiology, and technological advances in molecular diagnostics and sequencing platforms. The COVID-19 pandemic has further confirmed the importance of wastewater surveillance as a dependable tool for monitoring community-level disease outbreaks. Wastewater surveillance is expanding beyond pandemic tracking to encompass antimicrobial resistance, illicit drug consumption patterns, and industrial pollution. The use of smart sensors, cloud-based data analytics, and automated sampling systems is making surveillance more scalable and cost-effective. These developments, along with rising public-private collaborations and regulatory support, are expected to propel the ongoing adoption of wastewater-based monitoring systems globally.

“Software solutions are expected to register the highest CAGR in the product type market during the study period.”

Software solutions are expected to see the highest growth in the wastewater surveillance market due to the increasing demand for real-time data analytics,

automated reporting, and predictive modeling. As surveillance programs expand, the volume of data generated from pathogen detection, sampling sites, and temporal trends is increasing rapidly, making manual processing inefficient. Advanced software platforms enable seamless integration of laboratory results, GIS mapping, trend visualization, and AI-based outbreak prediction, which greatly improves decision-making and response times. Governments, utilities, and research institutions are investing in digital infrastructure to enhance surveillance accuracy, optimize resource use, and meet regulatory requirements. Additionally, the move toward smart city development and digital public health systems across the Asia Pacific, North America, and Europe is boosting the demand for scalable, interoperable software solutions. Cloud-based platforms also support centralized monitoring across multiple sites, making them highly attractive for regional and national programs. As stakeholders focus on cost-efficiency, real-time insights, and actionable intelligence, software will play a crucial role in expanding wastewater surveillance systems worldwide.

“The government & regulatory agency held the largest share of the wastewater surveillance end user market in 2024.”

Governments and regulatory agencies dominate the wastewater surveillance market because of their key role in public health, environmental protection, and epidemic response. These organizations mainly oversee the monitoring and control of infectious diseases, water safety, and the enforcement of environmental laws. They fund large-scale surveillance initiatives, require pathogen testing in wastewater, and often implement early warning systems to monitor community health. During global health emergencies like the COVID-19 pandemic, many nations used wastewater-based epidemiology as a cost-effective, non-invasive way to identify outbreaks. Regulatory agencies also collaborate with research institutions and private companies to standardize testing procedures and incorporate data into national health plans. Their capacity to manage budgets, expand infrastructure, and enforce policies grants them significant influence, making them the largest and most consistent users in the market.

“The Asia Pacific regional segment is expected to register the highest CAGR in the wastewater surveillance regional market during the forecast period.”

The Asia Pacific region is expected to achieve the highest CAGR in the wastewater surveillance market due to a mix of environmental, healthcare, and infrastructural factors. Rapid urbanization and industrialization have significantly increased wastewater production across countries like China, India, Indonesia, and Vietnam, creating a need for better monitoring systems to protect the environment and public health.

Governments in the area are increasingly adopting wastewater-based epidemiology (WBE) to monitor infectious diseases such as COVID-19 and antimicrobial resistance, especially in densely populated urban centers. Countries like Japan and South Korea are already integrating wastewater surveillance into their broader disease control strategies. Additionally, the growth of smart city projects and digital water infrastructure is enabling real-time pathogen tracking and early outbreak detection. Meanwhile, rising awareness about the importance of environmental diagnostics and sustainability is boosting demand for innovative solutions such as PCR-based detection kits, biosensors, and data analytics platforms. The region's large population, increasing health surveillance requirements, and new environmental compliance policies all contribute to its strong growth prospects in the wastewater surveillance market.

A breakdown of the primary participants referred to for this report is provided below:

By Company: Tier 1 (35%), Tier 2 (45%), and Tier 3 (20%)

By Designation: C-level Executives (35%), Director-level Executives (25%), and Others (40%)

By Region: North America (40%), Europe (30%), Asia Pacific (20%), Latin America (5%), and the Middle East & Africa (5%)

Prominent players in the waste water surveillance market include Thermo Fisher Scientific (US), Bio-Rad Laboratories (US), IDEXX Laboratories (US), Eurofins Scientific (Luxembourg), GT Molecular (US), Illumina (US), Oxford Nanopore (UK), Hach (Danaher) (US), Teledyne ISCO (US), LuminUltra (Canada), Biobot Analytics (US), Modern Water (DeepVerge) (UK), Promega (US), Aquamonitrix (Ireland), PathogenDx (US), Zymo Research (US), Kando (Israel), 4sight Analytics (US), among others.

Research Coverage

The report studies the wastewater surveillance market based on brand, product type, procedure, end user, and region.

The report analyzes factors (such as drivers, restraints, opportunities, and challenges) affecting market growth.

The report evaluates the opportunities and challenges in the market for

stakeholders and provides details of the competitive landscape for market leaders.

The report studies micro markets with respect to their growth trends, prospects, and contributions to the global wastewater surveillance market.

The report forecasts the revenue of market segments with respect to five major regions.

Key Benefits of Buying this Report

This report is valuable for both new and existing players in the market, providing essential information to identify potential investment opportunities. It offers a comprehensive overview of both major and minor competitors, aiding effective risk analysis and informed investment choices. The report features detailed segmentation based on end users and geographic regions, giving in-depth insights into niche market segments. Additionally, it highlights key trends, growth drivers, challenges, and opportunities, supporting strategic decision-making with a balanced perspective analysis.

Through this report, readers get insightful views into the following parameters:

Analysis of key drivers (increasing need for early detection of public health threats, government funding for pandemic preparedness, and integration of wastewater data into national disease surveillance systems), restraints (high operational costs, lack of standardization in testing protocols, and limited infrastructure in low-resource regions), opportunities (expansion of surveillance beyond COVID-19 to antimicrobial resistance, pharmaceutical residues, and industrial pollutants; growing interest from private and municipal stakeholders), challenges (data interpretation complexity, lack of trained personnel, regulatory ambiguity, and difficulty in integrating surveillance findings into actionable public health responses), relating to the growth of the wastewater surveillance market.

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the wastewater surveillance market.

Market Development: Comprehensive information about lucrative markets – the

report analyses the wastewater surveillance market across varied regions.

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the wastewater surveillance market

Competitive Assessment: A comprehensive analysis of market share, product offerings, and leading strategies of major players, such as Thermo Fisher Scientific (US), Bio-Rad Laboratories (US), IDEXX Laboratories (US), Eurofins Scientific (Luxembourg), GT Molecular (US), Illumina (US), Oxford Nanopore (UK), Hach (Danaher) (US), Teledyne ISCO (US), LuminUltra (Canada), Biobot Analytics (US), Modern Water (DeepVerge) (UK), Promega (US), Aquamonitrix (Ireland), PathogenDx (US), Zymo Research (US), Kando (Israel), 4sight Analytics (US)

Contents

1 INTRODUCTION

- 1.1 STUDY OBJECTIVES
- 1.2 MARKET DEFINITION
- 1.3 STUDY SCOPE
 - 1.3.1 MARKET SEGMENTATION & REGIONAL SCOPE
 - 1.3.2 INCLUSIONS & EXCLUSIONS
 - 1.3.3 YEARS CONSIDERED
 - 1.3.4 CURRENCY CONSIDERED
- 1.4 STAKEHOLDERS

2 RESEARCH METHODOLOGY

- 2.1 RESEARCH DATA
 - 2.1.1 SECONDARY RESEARCH
 - 2.1.1.1 Key secondary sources
 - 2.1.1.2 Key data from secondary sources
 - 2.1.1.3 Objectives of secondary research
 - 2.1.2 PRIMARY RESEARCH
 - 2.1.2.1 Key primary sources
 - 2.1.2.2 List of key participants
 - 2.1.2.3 Breakdown of primary interviews
 - 2.1.2.4 Objectives of primary research
 - 2.1.2.5 Insights from industry experts
- 2.2 MARKET SIZE ESTIMATION
 - 2.2.1 BOTTOM-UP APPROACH
 - 2.2.1.1 Company revenue estimation
 - 2.2.1.2 Customer-based market estimation
 - 2.2.1.3 Primary interviews
 - 2.2.2 TOP-DOWN APPROACH
- 2.3 DATA TRIANGULATION
- 2.4 STUDY ASSUMPTIONS
- 2.5 RESEARCH LIMITATIONS
- 2.6 RISK ANALYSIS

3 EXECUTIVE SUMMARY

4 PREMIUM INSIGHTS

4.1 WASTEWATER SURVEILLANCE MARKET OVERVIEW

4.2 WASTEWATER SURVEILLANCE MARKET, BY REGION

4.3 ASIA PACIFIC: WASTEWATER SURVEILLANCE MARKET, BY COUNTRY AND END USER

4.4 GEOGRAPHIC SNAPSHOT OF WASTEWATER SURVEILLANCE MARKET

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

5.2.1 DRIVERS

5.2.1.1 Increased institutional rollout and official government programs

5.2.1.2 Broader pathogen scope and public-health adoption

5.2.1.3 Faster and cheaper molecular and sequencing technologies

5.2.2 RESTRAINTS

5.2.2.1 Fragmented procurement and limited long-term budgets

5.2.2.2 Analytical and interpretation complexity

5.2.2.3 Lack of global sampling, processing, and reporting standardization and comparability

5.2.3 OPPORTUNITIES

5.2.3.1 Integration of wastewater surveillance with digital epidemiology and AI analytics

5.2.3.2 Expansion to multi-parameter public health and environmental intelligence platform from pandemic-driven pathogen monitoring tool

5.2.3.3 Scaling WBE programs in low- and middle-income countries (LMICs)

5.2.4 CHALLENGES

5.2.4.1 Fragmented regulatory framework and lack of global standardization

5.2.4.2 High operational costs and infrastructure limitations in resource-poor settings

5.2.4.3 Data privacy concerns and public acceptance barriers

5.3 TECHNOLOGY ANALYSIS

5.3.1 KEY TECHNOLOGIES

5.3.1.1 Automated composite sampling systems

5.3.1.2 qPCR and digital PCR platforms

5.3.1.3 Next-generation sequencing

5.3.2 COMPLEMENTARY TECHNOLOGIES

5.3.2.1 Geographic information systems

5.3.2.2 Internet of things (IoT) and remote sensing devices

- 5.3.2.3 Cloud-based data analytics platforms
- 5.3.3 ADJACENT TECHNOLOGIES
 - 5.3.3.1 Clinical diagnostics (PCR and rapid antigen testing)
 - 5.3.3.2 Genomic epidemiology (pathogen sequencing)
- 5.4 SUPPLY CHAIN ANALYSIS
 - 5.4.1 PROMINENT PLAYERS
 - 5.4.2 SMALL AND MEDIUM-SIZED ENTERPRISES
 - 5.4.3 SALES & DISTRIBUTION PARTNERS
 - 5.4.4 END USERS
- 5.5 PORTER'S FIVE FORCES ANALYSIS
 - 5.5.1 THREAT OF NEW ENTRANTS
 - 5.5.2 THREAT OF SUBSTITUTES
 - 5.5.3 BARGAINING POWER OF SUPPLIERS
 - 5.5.4 BARGAINING POWER OF BUYERS
 - 5.5.5 INTENSITY OF COMPETITIVE RIVALRY
- 5.6 KEY STAKEHOLDERS & BUYING CRITERIA
 - 5.6.1 KEY STAKEHOLDERS IN BUYING PROCESS, BY PRODUCT
 - 5.6.2 KEY BUYING CRITERIA
- 5.7 PATENT ANALYSIS
 - 5.7.1 WASTEWATER SURVEILLANCE MARKET: TOP 10 APPLICANTS/COMPANIES WITH HIGHEST NUMBER OF PATENTS, JANUARY 2015–APRIL 2025
 - 5.7.2 LIST OF MAJOR PATENTS
- 5.8 KEY CONFERENCES & EVENTS, 2025–2026
- 5.9 TRADE DATA ANALYSIS
 - 5.9.1 IMPORT DATA FOR HS CODE 8479
 - 5.9.2 EXPORT DATA FOR HS CODE 8479
- 5.10 UNMET NEEDS & KEY PAIN POINTS
- 5.11 ECOSYSTEM ANALYSIS
 - 5.11.1 ROLE OF ECOSYSTEM
- 5.12 TRENDS/DISRUPTIONS IMPACTING CUSTOMER'S BUSINESS
- 5.13 INVESTMENT & FUNDING SCENARIO
- 5.14 IMPACT OF AI/GEN AI ON WASTEWATER SURVEILLANCE MARKET
- 5.15 REGULATORY ANALYSIS
 - 5.15.1 REGULATORY LANDSCAPE
 - 5.15.1.1 North America
 - 5.15.1.1.1 US
 - 5.15.1.1.2 Canada
 - 5.15.1.2 Europe

- 5.15.1.2.1 European Union (UWWTD / IVDR interplay)
- 5.15.1.2.2 UK
- 5.15.1.2.3 Germany
- 5.15.1.2.4 France
- 5.15.1.2.5 Italy
- 5.15.1.2.6 Spain
- 5.15.1.2.7 Netherlands (RIVM)
- 5.15.1.3 Asia Pacific
 - 5.15.1.3.1 China
 - 5.15.1.3.2 India
 - 5.15.1.3.3 Australia
 - 5.15.1.3.4 Japan
 - 5.15.1.3.5 South Korea
- 5.15.1.4 Latin America
 - 5.15.1.4.1 Brazil
 - 5.15.1.4.2 Mexico
 - 5.15.1.4.3 Argentina
 - 5.15.1.4.4 Chile
 - 5.15.1.4.5 Colombia
- 5.15.2 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS
- 5.16 PRICING ANALYSIS
 - 5.16.1 AVERAGE SELLING PRICE TREND OF WASTEWATER SURVEILLANCE PRODUCTS, BY REGION, 2022–2024
 - 5.16.2 AVERAGE SELLING PRICE OF WASTEWATER SURVEILLANCE PRODUCTS, BY KEY PLAYER, 2024
- 5.17 IMPACT OF 2025 US TARIFF ON WASTEWATER SURVEILLANCE MARKET
 - 5.17.1 INTRODUCTION
 - 5.17.2 KEY TARRIF RATES
 - 5.17.3 PRICE IMPACT ANALYSIS
 - 5.17.4 IMPACT ON COUNTRY/REGION
 - 5.17.4.1 North America
 - 5.17.4.2 Europe
 - 5.17.4.3 Asia Pacific
 - 5.17.5 IMPACT ON END-USE INDUSTRIES
 - 5.17.5.1 Municipal utilities
 - 5.17.5.2 Public health agencies
 - 5.17.5.3 Industrial dischargers (F&B and pharma/biotech plants)
 - 5.17.5.4 Academic & research institutes

5.17.5.5 Private labs & service providers

6 WASTEWATER SURVEILLANCE MARKET, BY PRODUCT

6.1 INTRODUCTION

6.2 INSTRUMENTS & EQUIPMENT

6.2.1 AUTOMATED WASTEWATER SAMPLERS

6.2.1.1 Automated samplers to be indispensable for accurate infectious disease monitoring, AMR tracking, and chemical residue detection

6.2.2 SAMPLE FILTRATION & ULTRACENTRIFUGATION

6.2.2.1 Technological innovations to reduce variability and make large-scale wastewater surveillance programs more reproducible

6.2.3 PCR & QPCR INSTRUMENTS

6.2.3.1 PCR & qPCR instruments to enable sensitive detection of microbial targets from complex environmental samples

6.2.4 NGS SEQUENCERS

6.2.4.1 Expansion of surveillance beyond single pathogens for AMR and new viral threats by government bodies to speed up adoption

6.2.5 PORTABLE FIELD-TESTING DEVICES

6.2.5.1 Portable field-testing devices to allow quick on-site detection of pathogens without centralized lab facilities

6.3 DETECTION ASSAYS & TESTING KITS

6.3.1 VIRAL PATHOGEN DETECTION KITS

6.3.1.1 Need for improved sensitivity in low-viral-load wastewater samples to increase demand for high-throughput, multiplexed detection kits

6.3.2 BACTERIAL DETECTION KITS

6.3.2.1 Favorable regulatory policies to spur growth for food safety, healthcare-associated infections, and antimicrobial resistance surveillance

6.3.3 AMR GENE PANELS

6.3.3.1 Growing integration of ML and bioinformatics tools to enable predictive modelling of resistance emergence

6.3.4 SUBSTANCE & PHARMACEUTICAL RESIDUE DETECTION KITS

6.3.4.1 Need for enhanced wastewater contaminant detection capabilities to fuel market adoption

6.3.5 OTHER ASSAY KITS & PANELS

6.4 SOFTWARE

6.4.1 INCREASED DEPENDENCY ON CLOUD-BASED WASTEWATER ANALYTICS FOR EARLY OUTBREAK ALERTS TO BOOST MARKET GROWTH

6.5 CONSUMABLES & ACCESSORIES

6.5.1 COMPLEXITY OF WASTEWATER MATRICES TO PROPEL ADOPTION FOR MAXIMIZED YIELD, PURITY, AND REPRODUCIBILITY

7 WASTEWATER SURVEILLANCE MARKET, BY APPLICATION

7.1 INTRODUCTION

7.2 INFECTIOUS DISEASE SURVEILLANCE

7.2.1 NATIONAL WASTEWATER SURVEILLANCE PROGRAMS TO MAKE WASTEWATER MONITORING ESSENTIAL FOR BETTER PUBLIC HEALTH

7.3 ANTIMICROBIAL RESISTANCE (AMR) MONITORING

7.3.1 INTEGRATION OF ANTIMICROBIAL RESISTANCE MONITORING INTO PUBLIC HEALTH PROGRAMS TO EASE GLOBAL CRISIS MANAGEMENT

7.4 INDUSTRIAL & ENVIRONMENTAL POLLUTION DETECTION

7.4.1 FAVORABLE GOVERNMENT INITIATIVES AND INCREASED PRIVATE INVESTMENTS TO BOOST MARKET GROWTH

7.5 OTHER APPLICATIONS

8 WASTEWATER SURVEILLANCE MARKET, BY END USER

8.1 INTRODUCTION

8.2 GOVERNMENT & REGULATORY AGENCIES

8.2.1 FAVORABLE POLICY MANDATES AND HIGH INVESTMENTS IN SURVEILLANCE INFRASTRUCTURE TO DRIVE MARKET

8.3 PUBLIC HEALTH AUTHORITIES

8.3.1 PUBLIC HEALTH AUTHORITIES TO TRANSFORM WASTEWATER DATA INTO REAL-TIME INTELLIGENCE FOR BETTER OUTBREAK DETECTION

8.4 RESEARCH & ACADEMIC INSTITUTES

8.4.1 INCREASED METHODOLOGICAL INNOVATION AND STANDARDIZATION IN WASTEWATER-BASED EPIDEMIOLOGY TO PROPEL MARKET GROWTH

8.5 WASTEWATER TREATMENT PLANTS

8.5.1 WASTEWATER TREATMENT PLANTS TO EMERGE AS OPERATIONAL BACKBONE OF GLOBAL LARGE-SCALE SURVEILLANCE NETWORKS

8.6 CONTRACT TESTING & ANALYTICAL LABORATORIES

8.6.1 CONTRACT TESTING & ANALYTICAL LABORATORIES TO SCALE HIGH-THROUGHPUT CAPACITY FOR PATHOGEN AND BIOMARKER SURVEILLANCE

8.7 OTHER END USERS

9 WASTEWATER SURVEILLANCE MARKET, BY REGION

9.1 INTRODUCTION

9.2 NORTH AMERICA

9.2.1 MACROECONOMIC OUTLOOK FOR NORTH AMERICA

9.2.2 US

9.2.2.1 US to dominate North American wastewater surveillance market during forecast period

9.2.3 CANADA

9.2.3.1 Popularity of advanced sequencing technologies and strong federal–provincial collaboration to boost market growth

9.3 EUROPE

9.3.1 MACROECONOMIC OUTLOOK FOR EUROPE

9.3.2 GERMANY

9.3.2.1 Focus on advanced detection tools with enhanced readiness against public health threats to support market growth

9.3.3 FRANCE

9.3.3.1 Increased recognition of wastewater-based epidemiology as cost-effective and non-invasive monitoring tool to drive market

9.3.4 UK

9.3.4.1 Expansion of wastewater surveillance use from infectious diseases to public health intelligence to fuel market growth

9.3.5 ITALY

9.3.5.1 Advancement in PCR assays to bring innovation in wastewater Surveillance

9.3.6 SPAIN

9.3.6.1 Need for early detection of outbreaks to propel adoption of wastewater surveillance products

9.3.7 REST OF EUROPE

9.4 ASIA PACIFIC

9.4.1 MACROECONOMIC OUTLOOK FOR ASIA PACIFIC

9.4.2 CHINA

9.4.2.1 Advanced automation solutions by key players to expand surveillance in antimicrobial resistance and enteric pathogens

9.4.3 JAPAN

9.4.3.1 Strong research ecosystem, high public health awareness, and widespread support for early-warning systems to drive market

9.4.4 INDIA

9.4.4.1 Increasing need for early detection of infectious diseases to drive adoption of antimicrobial resistance surveillance

9.4.5 AUSTRALIA

9.4.5.1 Popularity of National Wastewater Surveillance Program for priority and

emerging pathogen tracking to drive market

9.4.6 SOUTH KOREA

9.4.6.1 Long-term monitoring programs to drive wastewater surveillance for tracking infectious pathogens and antimicrobial resistance

9.4.7 REST OF ASIA PACIFIC

9.5 LATIN AMERICA

9.5.1 MACROECONOMIC OUTLOOK FOR LATIN AMERICA

9.5.2 BRAZIL

9.5.2.1 Supportive government initiatives and high sanitation investments to support market growth

9.5.3 MEXICO

9.5.3.1 Favorable business environment for market players and focus on integrating wastewater-based epidemiology to aid market growth

9.5.4 REST OF LATIN AMERICA

9.6 MIDDLE EAST & AFRICA

9.6.1 MACROECONOMIC OUTLOOK FOR MIDDLE EAST & AFRICA

9.6.2 GCC COUNTRIES

9.6.2.1 Shift from single-pathogen monitoring to multi-pathogen and AMR-focused surveillance to propel market growth

9.6.3 REST OF MIDDLE EAST & AFRICA

10 COMPETITIVE LANDSCAPE

10.1 INTRODUCTION

10.2 KEY PLAYERS' STRATEGIES/RIGHT TO WIN

10.2.1 OVERVIEW OF STRATEGIES ADOPTED BY KEY PLAYERS IN WASTEWATER SURVEILLANCE MARKET

10.3 REVENUE ANALYSIS, 2020–2024

10.4 MARKET SHARE ANALYSIS, 2024

10.4.1 MARKET RANKING OF KEY PLAYERS

10.5 COMPANY VALUATION & FINANCIAL METRICS

10.5.1 FINANCIAL METRICS

10.5.2 COMPANY VALUATION

10.6 BRAND/PRODUCT COMPARISON

10.7 COMPANY EVALUATION MATRIX: KEY PLAYERS, 2024

10.7.1 STARS

10.7.2 EMERGING LEADERS

10.7.3 PERVASIVE PLAYERS

10.7.4 PARTICIPANTS

10.7.5 COMPANY FOOTPRINT: KEY PLAYERS, 2024

10.7.5.1 Company footprint

10.7.5.2 Region footprint

10.7.5.3 Product footprint

10.7.5.4 Application footprint

10.7.5.5 End-user footprint

10.8 COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2024

10.8.1 PROGRESSIVE COMPANIES

10.8.2 RESPONSIVE COMPANIES

10.8.3 DYNAMIC COMPANIES

10.8.4 STARTING BLOCKS

10.8.5 COMPETITIVE BENCHMARKING OF STARTUPS/SMES, 2024

10.8.5.1 Detailed list of key startups/SMEs

10.8.5.2 Competitive benchmarking of key startups/SMEs

10.9 COMPETITIVE SCENARIO

10.9.1 PRODUCT LAUNCHES

10.9.2 DEALS

10.9.3 EXPANSIONS

11 COMPANY PROFILES

11.1 KEY PLAYERS

11.1.1 BECKMAN COULTER, INC. (DANAHER CORPORATION)

11.1.1.1 Business overview

11.1.1.2 Products/Services/Solutions offered

11.1.1.3 MnM view

11.1.1.3.1 Right to win

11.1.1.3.2 Strategic choices

11.1.1.3.3 Weaknesses & competitive threats

11.1.2 MERCK KGAA

11.1.2.1 Business overview

11.1.2.2 Products/Services/Solutions offered

11.1.2.3 MnM view

11.1.2.3.1 Right to win

11.1.2.3.2 Strategic choices

11.1.2.3.3 Weaknesses & competitive threats

11.1.3 THERMO FISHER SCIENTIFIC INC.

11.1.3.1 Business overview

11.1.3.2 Products/Services/Solutions offered

- 11.1.3.3 Recent developments
 - 11.1.3.3.1 Product launches
- 11.1.3.4 MnM view
 - 11.1.3.4.1 Right to win
 - 11.1.3.4.2 Strategic choices
 - 11.1.3.4.3 Weaknesses & competitive threats
- 11.1.4 ILLUMINA, INC.
 - 11.1.4.1 Business overview
 - 11.1.4.2 Products/Services/Solutions offered
 - 11.1.4.3 Recent developments
 - 11.1.4.3.1 Product launches
 - 11.1.4.4 MnM view
 - 11.1.4.4.1 Right to win
 - 11.1.4.4.2 Strategic choices
 - 11.1.4.4.3 Weaknesses & competitive threats
- 11.1.5 IDEXX LABORATORIES
 - 11.1.5.1 Business overview
 - 11.1.5.2 Products/Services/Solutions offered
 - 11.1.5.3 MnM view
 - 11.1.5.3.1 Right to win
 - 11.1.5.3.2 Strategic choices
 - 11.1.5.3.3 Weaknesses & competitive threats
- 11.1.6 TELEDYNE TECHNOLOGIES INCORPORATED
 - 11.1.6.1 Business overview
 - 11.1.6.2 Products/Services/Solutions offered
- 11.1.7 EUROFINS SCIENTIFIC
 - 11.1.7.1 Business overview
 - 11.1.7.2 Products/Services/Solutions offered
 - 11.1.7.3 Recent developments
 - 11.1.7.3.1 Product launches
- 11.1.8 BIO-RAD LABORATORIES, INC.
 - 11.1.8.1 Business overview
 - 11.1.8.2 Products/Services/Solutions offered
 - 11.1.8.3 Recent developments
 - 11.1.8.3.1 Product launches
 - 11.1.8.3.2 Deals
- 11.1.9 BIOBOT ANALYTICS, INC.
 - 11.1.9.1 Business overview
 - 11.1.9.2 Products/Services/Solutions offered

- 11.1.9.3 Recent developments
 - 11.1.9.3.1 Product launches
 - 11.1.9.3.2 Deals
- 11.1.10 GT MOLECULAR
 - 11.1.10.1 Business overview
 - 11.1.10.2 Products/Services/Solutions offered
 - 11.1.10.3 Recent developments
 - 11.1.10.3.1 Product launches
 - 11.1.10.3.2 Deals
- 11.1.11 PROMEGA CORPORATION
 - 11.1.11.1 Business overview
 - 11.1.11.2 Products/Services/Solutions offered
 - 11.1.11.3 Recent developments
 - 11.1.11.3.1 Expansions
- 11.1.12 QIAGEN
 - 11.1.12.1 Business overview
 - 11.1.12.2 Products/Services/Solutions offered
 - 11.1.12.3 Recent developments
 - 11.1.12.3.1 Product launches
- 11.2 OTHER PLAYERS
 - 11.2.1 ZYMO RESEARCH CORPORATION
 - 11.2.2 CERES NANOSCIENCES, INC.
 - 11.2.3 FUSION GENOMICS CORPORATION
 - 11.2.4 LUMINULTRA
 - 11.2.5 ACLARITY, INC.
 - 11.2.6 VERMICON
 - 11.2.7 AQUATIC INFORMATICS ULC
 - 11.2.8 KANDO
 - 11.2.9 BLUEDOT INC.
 - 11.2.10 FLUIDION
 - 11.2.11 VELARTO
 - 11.2.12 OXFORD NANOPORE TECHNOLOGIES
 - 11.2.13 XYLEM

12 APPENDIX

- 12.1 DISCUSSION GUIDE
- 12.2 KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL
- 12.3 CUSTOMIZATION OPTIONS

12.4 RELATED REPORTS

12.5 AUTHOR DETAILS

List Of Tables

LIST OF TABLES

TABLE 1 WASTEWATER SURVEILLANCE MARKET: INCLUSIONS & EXCLUSIONS

TABLE 2 WASTEWATER SURVEILLANCE MARKET: STUDY ASSUMPTIONS

TABLE 3 WASTEWATER SURVEILLANCE MARKET: RISK ANALYSIS

TABLE 4 WASTEWATER SURVEILLANCE MARKET: PORTER'S FIVE FORCES

TABLE 5 INFLUENCE OF KEY STAKEHOLDERS ON BUYING PROCESS, BY PRODUCT

TABLE 6 INFLUENCE OF KEY STAKEHOLDERS ON BUYING PROCESS FOR TOP FOUR END USERS

TABLE 7 LIST OF MAJOR PATENTS IN WASTEWATER SURVEILLANCE MARKET, JANUARY 2021–SEPTEMBER 2025

TABLE 8 KEY CONFERENCES & EVENTS IN WASTEWATER SURVEILLANCE MARKET, JANUARY 2025–DECEMBER 2026

TABLE 9 IMPORT DATA FOR HS CODE 8479, BY COUNTRY, 2020–2024 (USD THOUSAND)

TABLE 10 EXPORT DATA FOR HS CODE 8479, BY COUNTRY, 2020–2024 (USD THOUSAND)

TABLE 11 UNMET NEEDS & KEY PAIN POINTS IN WASTEWATER SURVEILLANCE MARKET

TABLE 12 WASTEWATER SURVEILLANCE MARKET: ROLE OF ECOSYSTEM

TABLE 13 NORTH AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 14 EUROPE: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 15 ASIA PACIFIC: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 16 LATIN AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 17 REST OF THE WORLD: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 18 AVERAGE SELLING PRICE TREND OF WASTEWATER SURVEILLANCE PRODUCTS, BY REGION, 2022–2024 (USD THOUSAND)

TABLE 19 KEY TARRIF RATES IN WASTEWATER SURVEILLANCE MARKET

TABLE 20 WASTEWATER SURVEILLANCE MARKET, BY PRODUCT, 2023–2030 (USD MILLION)

TABLE 21 WASTEWATER SURVEILLANCE MARKET, BY REGION, 2023–2030 (USD MILLION)

TABLE 22 WASTEWATER SURVEILLANCE MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 23 WASTEWATER SURVEILLANCE MARKET, BY END USER, 2023–2030 (USD MILLION)

TABLE 24 WASTEWATER SURVEILLANCE INSTRUMENTS & EQUIPMENT MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 25 WASTEWATER SURVEILLANCE INSTRUMENTS & EQUIPMENT MARKET, BY REGION, 2023–2030 (USD MILLION)

TABLE 26 WASTEWATER SURVEILLANCE INSTRUMENTS & EQUIPMENT MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 27 WASTEWATER SURVEILLANCE INSTRUMENTS & EQUIPMENT MARKET, BY END USER, 2023–2030 (USD MILLION)

TABLE 28 AUTOMATED WASTEWATER SAMPLERS MARKET, BY REGION, 2023–2030 (USD MILLION)

TABLE 29 AUTOMATED WASTEWATER SAMPLERS MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 30 AUTOMATED WASTEWATER SAMPLERS MARKET, BY END USER, 2023–2030 (USD MILLION)

TABLE 31 SAMPLE FILTRATION & ULTRACENTRIFUGATION MARKET, BY REGION, 2023–2030 (USD MILLION)

TABLE 32 SAMPLE FILTRATION & ULTRACENTRIFUGATION MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 33 SAMPLE FILTRATION & ULTRACENTRIFUGATION MARKET, BY END USER, 2023–2030 (USD MILLION)

TABLE 34 PCR & QPCR INSTRUMENTS MARKET, BY REGION, 2023–2030 (USD MILLION)

TABLE 35 PCR & QPCR INSTRUMENTS MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 36 PCR & QPCR INSTRUMENTS MARKET, BY END USER, 2023–2030 (USD MILLION)

TABLE 37 NGS SEQUENCERS MARKET, BY REGION, 2023–2030 (USD MILLION)

TABLE 38 NGS SEQUENCERS MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 39 NGS SEQUENCERS MARKET, BY END USER, 2023–2030 (USD MILLION)

TABLE 40 PORTABLE FIELD-TESTING DEVICES MARKET, BY REGION, 2023–2030 (USD MILLION)

TABLE 41 PORTABLE FIELD-TESTING DEVICES MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 42 PORTABLE FIELD-TESTING DEVICES MARKET, BY END USER,

2023–2030 (USD MILLION)

TABLE 43 WASTEWATER SURVEILLANCE DETECTION ASSAYS & TESTING KITS MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 44 WASTEWATER SURVEILLANCE DETECTION ASSAYS & TESTING KITS MARKET, BY REGION, 2023–2030 (USD MILLION)

TABLE 45 WASTEWATER SURVEILLANCE DETECTION ASSAYS & TESTING KITS MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 46 WASTEWATER SURVEILLANCE DETECTION ASSAYS & TESTING KITS MARKET, BY END USER, 2023–2030 (USD MILLION)

TABLE 47 VIRAL PATHOGEN TESTING KITS MARKET, BY REGION, 2023–2030 (USD MILLION)

TABLE 48 VIRAL PATHOGEN TESTING KITS MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 49 VIRAL PATHOGEN TESTING KITS MARKET, BY END USER, 2023–2030 (USD MILLION)

TABLE 50 BACTERIAL DETECTION KITS MARKET, BY REGION, 2023–2030 (USD MILLION)

TABLE 51 BACTERIAL DETECTION KITS MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 52 BACTERIAL DETECTION KITS MARKET, BY END USER, 2023–2030 (USD MILLION)

TABLE 53 AMR GENE PANELS MARKET, BY REGION, 2023–2030 (USD MILLION)

TABLE 54 AMR GENE PANELS MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 55 AMR GENE PANELS MARKET, BY END USER, 2023–2030 (USD MILLION)

TABLE 56 SUBSTANCE & PHARMACEUTICAL RESIDUE DETECTION KITS MARKET, BY REGION, 2023–2030 (USD MILLION)

TABLE 57 SUBSTANCE & PHARMACEUTICAL RESIDUE DETECTION KITS MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 58 SUBSTANCE & PHARMACEUTICAL RESIDUE DETECTION KITS MARKET, BY END USER, 2023–2030 (USD MILLION)

TABLE 59 OTHER ASSAY KITS & PANELS MARKET, BY REGION, 2023–2030 (USD MILLION)

TABLE 60 OTHER ASSAY KITS & PANELS MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 61 OTHER ASSAY KITS & PANELS MARKET, BY END USER, 2023–2030 (USD MILLION)

TABLE 62 WASTEWATER SURVEILLANCE SOFTWARE MARKET, BY REGION,

2023–2030 (USD MILLION)

TABLE 63 WASTEWATER SURVEILLANCE SOFTWARE MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 64 WASTEWATER SURVEILLANCE SOFTWARE MARKET, BY END USER, 2023–2030 (USD MILLION)

TABLE 65 WASTEWATER SURVEILLANCE CONSUMABLES & ACCESSORIES MARKET, BY REGION, 2023–2030 (USD MILLION)

TABLE 66 WASTEWATER SURVEILLANCE CONSUMABLES & ACCESSORIES MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 67 WASTEWATER SURVEILLANCE CONSUMABLES & ACCESSORIES MARKET, BY END USER, 2023–2030 (USD MILLION)

TABLE 68 WASTEWATER SURVEILLANCE MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 69 WASTEWATER SURVEILLANCE MARKET FOR INFECTIOUS DISEASE SURVEILLANCE, BY REGION, 2023–2030 (USD MILLION)

TABLE 70 WASTEWATER SURVEILLANCE MARKET FOR ANTIMICROBIAL RESISTANCE MONITORING, BY REGION, 2023–2030 (USD MILLION)

TABLE 71 WASTEWATER SURVEILLANCE MARKET FOR INDUSTRIAL & ENVIRONMENTAL POLLUTION DETECTION, BY REGION, 2023–2030 (USD MILLION)

TABLE 72 WASTEWATER SURVEILLANCE MARKET FOR OTHER APPLICATIONS, BY REGION, 2023–2030 (USD MILLION)

TABLE 73 WASTEWATER SURVEILLANCE MARKET, BY END USER, 2023–2030 (USD MILLION)

TABLE 74 WASTEWATER SURVEILLANCE MARKET FOR GOVERNMENT & REGULATORY AGENCIES, BY REGION, 2023–2030 (USD MILLION)

TABLE 75 WASTEWATER SURVEILLANCE MARKET FOR PUBLIC HEALTH AUTHORITIES, BY REGION, 2023–2030 (USD MILLION)

TABLE 76 WASTEWATER SURVEILLANCE MARKET FOR RESEARCH & ACADEMIC INSTITUTES, BY REGION, 2023–2030 (USD MILLION)

TABLE 77 WASTEWATER SURVEILLANCE MARKET FOR WASTEWATER TREATMENT PLANTS, BY REGION, 2023–2030 (USD MILLION)

TABLE 78 WASTEWATER SURVEILLANCE MARKET FOR CONTRACT TESTING & ANALYTICAL LABORATORIES, BY REGION, 2023–2030 (USD MILLION)

TABLE 79 WASTEWATER SURVEILLANCE MARKET FOR OTHER END USERS, BY REGION, 2023–2030 (USD MILLION)

TABLE 80 WASTEWATER SURVEILLANCE MARKET, BY REGION, 2023–2030 (USD MILLION)

TABLE 81 NORTH AMERICA: KEY MACROINDICATORS

TABLE 82 NORTH AMERICA: WASTEWATER SURVEILLANCE MARKET, BY COUNTRY, 2023–2030 (USD MILLION)

TABLE 83 NORTH AMERICA: WASTEWATER SURVEILLANCE MARKET, BY PRODUCT, 2023–2030 (USD MILLION)

TABLE 84 NORTH AMERICA: WASTEWATER SURVEILLANCE INSTRUMENTS & EQUIPMENT MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 85 NORTH AMERICA: WASTEWATER SURVEILLANCE DETECTION ASSAYS & KITS MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 86 NORTH AMERICA: WASTEWATER SURVEILLANCE MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 87 NORTH AMERICA: WASTEWATER SURVEILLANCE MARKET, BY END USER, 2023–2030 (USD MILLION)

TABLE 88 US: WASTEWATER SURVEILLANCE MARKET, BY PRODUCT, 2023–2030 (USD MILLION)

TABLE 89 US: WASTEWATER SURVEILLANCE INSTRUMENTS & EQUIPMENT MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 90 US: WASTEWATER SURVEILLANCE DETECTION ASSAYS & TESTING KITS MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 91 CANADA: WASTEWATER SURVEILLANCE MARKET, BY PRODUCT, 2023–2030 (USD MILLION)

TABLE 92 CANADA: WASTEWATER SURVEILLANCE INSTRUMENTS & EQUIPMENT MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 93 CANADA: WASTEWATER SURVEILLANCE DETECTION ASSAYS & TESTING KITS MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 94 EUROPE: WASTEWATER SURVEILLANCE MARKET, BY COUNTRY,

2023–2030 (USD MILLION)

TABLE 95 EUROPE: WASTEWATER SURVEILLANCE MARKET, BY PRODUCT, 2023–2030 (USD MILLION)

TABLE 96 EUROPE: WASTEWATER SURVEILLANCE INSTRUMENTS & EQUIPMENT MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 97 EUROPE: WASTEWATER SURVEILLANCE DETECTION ASSAYS & KITS MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 98 EUROPE: WASTEWATER SURVEILLANCE MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 99 EUROPE: WASTEWATER SURVEILLANCE MARKET, BY END USER, 2023–2030 (USD MILLION)

TABLE 100 EUROPE: KEY MACROINDICATORS

TABLE 101 GERMANY: WASTEWATER SURVEILLANCE MARKET, BY PRODUCT, 2023–2030 (USD MILLION)

TABLE 102 GERMANY: WASTEWATER SURVEILLANCE INSTRUMENTS & EQUIPMENT MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 103 GERMANY: WASTEWATER SURVEILLANCE DETECTION ASSAYS & TESTING KITS MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 104 FRANCE: WASTEWATER SURVEILLANCE MARKET, BY PRODUCT, 2023–2030 (USD MILLION)

TABLE 105 FRANCE: WASTEWATER SURVEILLANCE INSTRUMENTS & EQUIPMENT MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 106 FRANCE: WASTEWATER SURVEILLANCE DETECTION ASSAYS & TESTING KITS MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 107 UK: WASTEWATER SURVEILLANCE MARKET, BY PRODUCT, 2023–2030 (USD MILLION)

TABLE 108 UK: WASTEWATER SURVEILLANCE INSTRUMENTS & EQUIPMENT MARKET, BY TYPE, BY TYPE, 2023–2030 (USD MILLION)

TABLE 109 UK: WASTEWATER SURVEILLANCE DETECTION ASSAYS & TESTING KITS MARKET, BY TYPE 2023–2030 (USD MILLION)

TABLE 110 ITALY: WASTEWATER SURVEILLANCE MARKET, BY PRODUCT, 2023–2030 (USD MILLION)

TABLE 111 ITALY: WASTEWATER SURVEILLANCE INSTRUMENTS & EQUIPMENT MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 112 ITALY: WASTEWATER SURVEILLANCE DETECTION ASSAYS & TESTING KITS MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 113 SPAIN: WASTEWATER SURVEILLANCE MARKET, BY PRODUCT, 2023–2030 (USD MILLION)

TABLE 114 SPAIN: WASTEWATER SURVEILLANCE INSTRUMENTS & EQUIPMENT MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 115 SPAIN: WASTEWATER SURVEILLANCE DETECTION ASSAYS & TESTING KITS MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 116 REST OF EUROPE: WASTEWATER SURVEILLANCE MARKET, BY PRODUCT, 2023–2030 (USD MILLION)

TABLE 117 REST OF EUROPE: WASTEWATER SURVEILLANCE INSTRUMENTS & EQUIPMENT MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 118 REST OF EUROPE: WASTEWATER SURVEILLANCE DETECTION ASSAYS & TESTING KITS MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 119 ASIA PACIFIC: WASTEWATER SURVEILLANCE MARKET, BY COUNTRY, 2023–2030 (USD MILLION)

TABLE 120 ASIA PACIFIC: WASTEWATER SURVEILLANCE MARKET, BY

PRODUCT, 2023–2030 (USD MILLION)

TABLE 121 ASIA PACIFIC: WASTEWATER SURVEILLANCE INSTRUMENTS & EQUIPMENT MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 122 ASIA PACIFIC: WASTEWATER SURVEILLANCE DETECTION ASSAYS & KITS MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 123 ASIA PACIFIC: WASTEWATER SURVEILLANCE MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 124 ASIA PACIFIC: WASTEWATER SURVEILLANCE MARKET, BY END USER, 2023–2030 (USD MILLION)

TABLE 125 ASIA PACIFIC: KEY MACROINDICATORS

TABLE 126 CHINA: WASTEWATER SURVEILLANCE MARKET, BY PRODUCT, 2023–2030 (USD MILLION)

TABLE 127 CHINA: WASTEWATER SURVEILLANCE INSTRUMENTS & EQUIPMENT MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 128 CHINA: WASTEWATER SURVEILLANCE DETECTION ASSAYS & TESTING KITS MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 129 JAPAN: WASTEWATER SURVEILLANCE MARKET, BY PRODUCT, 2023–2030 (USD MILLION)

TABLE 130 JAPAN: WASTEWATER SURVEILLANCE INSTRUMENTS & EQUIPMENT MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 131 JAPAN: WASTEWATER SURVEILLANCE DETECTION ASSAYS & TESTING KITS MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 132 INDIA: WASTEWATER SURVEILLANCE MARKET, BY PRODUCT, 2023–2030 (USD MILLION)

TABLE 133 INDIA: WASTEWATER SURVEILLANCE INSTRUMENTS & EQUIPMENT MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 134 INDIA: WASTEWATER SURVEILLANCE DETECTION ASSAYS & TESTING KITS MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 135 AUSTRALIA: WASTEWATER SURVEILLANCE MARKET, BY PRODUCT, 2023–2030 (USD MILLION)

TABLE 136 AUSTRALIA: WASTEWATER SURVEILLANCE INSTRUMENTS & EQUIPMENT MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 137 AUSTRALIA: WASTEWATER SURVEILLANCE DETECTION ASSAYS & TESTING KITS MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 138 SOUTH KOREA: WASTEWATER SURVEILLANCE MARKET, BY PRODUCT, 2023–2030 (USD MILLION)

TABLE 139 SOUTH KOREA: WASTEWATER SURVEILLANCE INSTRUMENTS & EQUIPMENT MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 140 SOUTH KOREA: WASTEWATER SURVEILLANCE DETECTION ASSAYS

& TESTING KITS MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 141 REST OF ASIA PACIFIC: WASTEWATER SURVEILLANCE MARKET, BY PRODUCT, 2023–2030 (USD MILLION)

TABLE 142 REST OF ASIA PACIFIC: WASTEWATER SURVEILLANCE INSTRUMENTS & EQUIPMENT MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 143 REST OF ASIA PACIFIC: WASTEWATER SURVEILLANCE DETECTION ASSAYS & TESTING KITS MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 144 LATIN AMERICA: WASTEWATER SURVEILLANCE MARKET, BY COUNTRY, 2023–2030 (USD MILLION)

TABLE 145 LATIN AMERICA: WASTEWATER SURVEILLANCE MARKET, BY PRODUCT, 2023–2030 (USD MILLION)

TABLE 146 LATIN AMERICA: WASTEWATER SURVEILLANCE INSTRUMENTS & EQUIPMENT MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 147 LATIN AMERICA: WASTEWATER SURVEILLANCE DETECTION ASSAYS & KITS MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 148 LATIN AMERICA: WASTEWATER SURVEILLANCE MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 149 LATIN AMERICA: WASTEWATER SURVEILLANCE MARKET, BY END USER, 2023–2030 (USD MILLION)

TABLE 150 LATIN AMERICA: KEY MACROINDICATORS

TABLE 151 BRAZIL: WASTEWATER SURVEILLANCE MARKET, BY PRODUCT, 2023–2030 (USD MILLION)

TABLE 152 BRAZIL: WASTEWATER SURVEILLANCE INSTRUMENTS & EQUIPMENT MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 153 BRAZIL: WASTEWATER SURVEILLANCE DETECTION ASSAYS & TESTING KITS MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 154 MEXICO: WASTEWATER SURVEILLANCE MARKET, BY PRODUCT, 2023–2030 (USD MILLION)

TABLE 155 MEXICO: WASTEWATER SURVEILLANCE INSTRUMENTS & EQUIPMENT MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 156 MEXICO: WASTEWATER SURVEILLANCE DETECTION ASSAYS & TESTING KITS MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 157 REST OF LATIN AMERICA: WASTEWATER SURVEILLANCE MARKET, BY PRODUCT, 2023–2030 (USD MILLION)

TABLE 158 REST OF LATIN AMERICA: WASTEWATER SURVEILLANCE INSTRUMENTS & EQUIPMENT MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 159 REST OF LATIN AMERICA: WASTEWATER SURVEILLANCE DETECTION ASSAYS & TESTING KITS MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 160 MIDDLE EAST & AFRICA: WASTEWATER SURVEILLANCE MARKET, BY REGION, 2023–2030 (USD MILLION)

TABLE 161 MIDDLE EAST & AFRICA: WASTEWATER SURVEILLANCE MARKET, BY PRODUCT, 2023–2030 (USD MILLION)

TABLE 162 MIDDLE EAST & AFRICA: WASTEWATER SURVEILLANCE INSTRUMENTS & EQUIPMENT MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 163 MIDDLE EAST & AFRICA: WASTEWATER SURVEILLANCE DETECTION ASSAYS & KITS MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 164 MIDDLE EAST & AFRICA: WASTEWATER SURVEILLANCE MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 165 MIDDLE EAST & AFRICA: WASTEWATER SURVEILLANCE MARKET, BY END USER, 2023–2030 (USD MILLION)

TABLE 166 MIDDLE EAST & AFRICA: KEY MACROINDICATORS

TABLE 167 GCC COUNTRIES: WASTEWATER SURVEILLANCE MARKET, BY PRODUCT, 2023–2030 (USD MILLION)

TABLE 168 GCC COUNTRIES: WASTEWATER SURVEILLANCE INSTRUMENTS & EQUIPMENT MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 169 GCC COUNTRIES: WASTEWATER SURVEILLANCE DETECTION ASSAYS & TESTING KITS MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 170 REST OF MIDDLE EAST & AFRICA: WASTEWATER SURVEILLANCE MARKET, BY PRODUCT, 2023–2030 (USD MILLION)

TABLE 171 REST OF MIDDLE EAST & AFRICA: WASTEWATER SURVEILLANCE INSTRUMENTS & EQUIPMENT MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 172 REST OF MIDDLE EAST & AFRICA: WASTEWATER SURVEILLANCE DETECTION ASSAYS & TESTING KITS MARKET, BY TYPE, 2023–2030 (USD MILLION)

TABLE 173 OVERVIEW OF STRATEGIES DEPLOYED BY KEY PLAYERS IN WASTEWATER SURVEILLANCE MARKET, JANUARY 2021–SEPTEMBER 2025

TABLE 174 WASTEWATER SURVEILLANCE MARKET: DEGREE OF COMPETITION

TABLE 175 WASTEWATER SURVEILLANCE MARKET: REGION FOOTPRINT

TABLE 176 WASTEWATER SURVEILLANCE MARKET: PRODUCT FOOTPRINT

TABLE 177 WASTEWATER SURVEILLANCE MARKET: APPLICATION FOOTPRINT

TABLE 178 WASTEWATER SURVEILLANCE MARKET: END-USER FOOTPRINT

TABLE 179 WASTEWATER SURVEILLANCE MARKET: DETAILED LIST OF KEY STARTUPS/SME PLAYERS

TABLE 180 WASTEWATER SURVEILLANCE MARKET: COMPETITIVE BENCHMARKING OF KEY STARTUPS/SME PLAYERS, BY PRODUCT AND REGION

TABLE 181 WASTEWATER SURVEILLANCE MARKET: PRODUCT LAUNCHES, JANUARY 2021–SEPTEMBER 2025

TABLE 182 WASTEWATER SURVEILLANCE MARKET: DEALS, JANUARY 2021–SEPTEMBER 2025

TABLE 183 WASTEWATER SURVEILLANCE MARKET: EXPANSIONS, JANUARY 2021–SEPTEMBER 2025

TABLE 184 BECKMAN COULTER, INC. (DANAHER CORPORATION): COMPANY OVERVIEW

TABLE 185 BECKMAN COULTER, INC. (DANAHER CORPORATION): PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 186 MERCK KGAA: COMPANY OVERVIEW

TABLE 187 MERCK KGAA: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 188 THERMO FISHER SCIENTIFIC INC.: COMPANY OVERVIEW

TABLE 189 THERMO FISHER SCIENTIFIC INC.: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 190 THERMO FISHER SCIENTIFIC INC.: PRODUCT LAUNCHES, JANUARY 2021–SEPTEMBER 2025

TABLE 191 ILLUMINA, INC.: COMPANY OVERVIEW

TABLE 192 ILLUMINA INC.: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 193 ILLUMINA, INC.: PRODUCT LAUNCHES, JANUARY 2021–SEPTEMBER 2025

TABLE 194 IDEXX LABORATORIES: COMPANY OVERVIEW

TABLE 195 IDEXX LABORATORIES: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 196 TELEDYNE TECHNOLOGIES INCORPORATED: COMPANY OVERVIEW

TABLE 197 TELEDYNE TECHNOLOGIES INCORPORATED: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 198 EUROFINS SCIENTIFIC: COMPANY OVERVIEW

TABLE 199 EUROFINS SCIENTIFIC: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 200 EUROFINS SCIENTIFIC: PRODUCT LAUNCHES, JANUARY 2021–SEPTEMBER 2025

TABLE 201 BIO-RAD LABORATORIES, INC.: COMPANY OVERVIEW

TABLE 202 BIO-RAD LABORATORIES, INC.: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 203 BIO-RAD LABORATORIES, INC.: PRODUCT LAUNCHES, JANUARY 2021–SEPTEMBER 2025

TABLE 204 BIO-RAD LABORATORIES, INC.: DEALS, JANUARY 2021–SEPTEMBER 2025

TABLE 205 BIOBOT ANALYTICS, INC.: COMPANY OVERVIEW

TABLE 206 BIOBOT ANALYTICS, INC.: PRODUCTS/SERVICES/SOLUTIONS

OFFERED

TABLE 207 BIOBOT ANALYTICS, INC.: PRODUCT LAUNCHES, JANUARY 2021–SEPTEMBER 2025

TABLE 208 BIOBOT ANALYTICS, INC.: DEALS, JANUARY 2021–SEPTEMBER 2025

TABLE 209 GT MOLECULAR: COMPANY OVERVIEW

TABLE 210 GT MOLECULAR: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 211 GT MOLECULAR: PRODUCT LAUNCHES, JANUARY 2021–SEPTEMBER 2025

TABLE 212 GT MOLECULAR: DEALS, JANUARY 2021–SEPTEMBER 2025

TABLE 213 PROMEGA CORPORATION: COMPANY OVERVIEW

TABLE 214 PROMEGA CORPORATION: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 215 PROMEGA CORPORATION: EXPANSIONS, JANUARY 2021–SEPTEMBER 2025

TABLE 216 QIAGEN: COMPANY OVERVIEW

TABLE 217 QIAGEN: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 218 QIAGEN: PRODUCT LAUNCHES, JANUARY 2021–SEPTEMBER 2025

TABLE 219 ZYMO RESEARCH CORPORATION: COMPANY OVERVIEW

TABLE 220 CERES NANOSCIENCES, INC.: COMPANY OVERVIEW

TABLE 221 FUSION GENOMICS CORPORATION: COMPANY OVERVIEW

TABLE 222 LUMINULTRA: COMPANY OVERVIEW

TABLE 223 ACLARITY, INC.: COMPANY OVERVIEW

TABLE 224 VERMICON: COMPANY OVERVIEW

TABLE 225 AQUATIC INFORMATICS ULC: COMPANY OVERVIEW

TABLE 226 KANDO: COMPANY OVERVIEW

TABLE 227 BLUEDOT INC.: COMPANY OVERVIEW

TABLE 228 FLUIDION: COMPANY OVERVIEW

TABLE 229 VELARTO: COMPANY OVERVIEW

TABLE 230 OXFORD NANOPORE TECHNOLOGIES: COMPANY OVERVIEW

TABLE 231 XYLEM: COMPANY OVERVIEW

List Of Figures

LIST OF FIGURES

- FIGURE 1 WASTEWATER SURVEILLANCE MARKET SEGMENTATION & REGIONAL SCOPE
- FIGURE 2 WASTEWATER SURVEILLANCE MARKET: YEARS CONSIDERED
- FIGURE 3 WASTEWATER SURVEILLANCE MARKET: RESEARCH DATA
- FIGURE 4 WASTEWATER SURVEILLANCE MARKET: RESEARCH DESIGN
- FIGURE 5 WASTEWATER SURVEILLANCE MARKET: KEY DATA FROM SECONDARY SOURCES
- FIGURE 6 WASTEWATER SURVEILLANCE MARKET: KEY PRIMARY SOURCES (DEMAND AND SUPPLY SIDES)
- FIGURE 7 WASTEWATER SURVEILLANCE MARKET: LIST OF KEY SUPPLY- AND DEMAND-SIDE PARTICIPANTS
- FIGURE 8 WASTEWATER SURVEILLANCE MARKET: BREAKDOWN OF PRIMARY INTERVIEWS, BY COMPANY TYPE, DESIGNATION, AND REGION
- FIGURE 9 WASTEWATER SURVEILLANCE MARKET: KEY INDUSTRY INSIGHTS
- FIGURE 10 RESEARCH METHODOLOGY: HYPOTHESIS BUILDING
- FIGURE 11 WASTEWATER SURVEILLANCE MARKET SIZE ESTIMATION: COMPANY REVENUE ESTIMATION
- FIGURE 12 WASTEWATER SURVEILLANCE MARKET SIZE ESTIMATION METHODOLOGY
- FIGURE 13 WASTEWATER SURVEILLANCE MARKET SIZE ESTIMATION: TOP-DOWN APPROACH
- FIGURE 14 WASTEWATER SURVEILLANCE MARKET: DATA TRIANGULATION
- FIGURE 15 WASTEWATER SURVEILLANCE MARKET, BY PRODUCT, 2025 VS. 2030 (USD MILLION)
- FIGURE 16 WASTEWATER SURVEILLANCE MARKET, BY APPLICATION, 2025 VS. 2030 (USD MILLION)
- FIGURE 17 WASTEWATER SURVEILLANCE MARKET, BY END USER, 2025 VS. 2030 (USD MILLION)
- FIGURE 18 REGIONAL SNAPSHOT OF WASTEWATER SURVEILLANCE MARKET
- FIGURE 19 RISING DEMAND FOR HIGH-THROUGHPUT AND EFFICIENT WASTEWATER TESTING TO DRIVE MARKET
- FIGURE 20 ASIA PACIFIC TO WITNESS HIGHEST CAGR DURING FORECAST PERIOD
- FIGURE 21 CHINA AND GOVERNMENT & REGULATORY AGENCIES LED ASIA PACIFIC MARKET IN 2024
- FIGURE 22 JAPAN TO REGISTER HIGHEST GROWTH RATE DURING STUDY

PERIOD

FIGURE 23 WASTEWATER SURVEILLANCE MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

FIGURE 24 WASTEWATER SURVEILLANCE MARKET: SUPPLY CHAIN ANALYSIS

FIGURE 25 WASTEWATER SURVEILLANCE MARKET: PORTER'S FIVE FORCES ANALYSIS

FIGURE 26 INFLUENCE OF KEY STAKEHOLDERS ON BUYING PROCESS, BY PRODUCT

FIGURE 27 KEY BUYING CRITERIA FOR TOP FOUR END USERS

FIGURE 28 PATENT ANALYSIS FOR WASTEWATER SURVEILLANCE, JANUARY 2015–AUGUST 2025

FIGURE 29 WASTEWATER SURVEILLANCE MARKET: ECOSYSTEM ANALYSIS

FIGURE 30 WASTEWATER SURVEILLANCE MARKET: TRENDS/DISRUPTIONS IMPACTING CUSTOMER'S BUSINESS

FIGURE 31 FUNDING AND NUMBER OF DEALS IN WASTEWATER SURVEILLANCE MARKET, 2019–2023 (USD MILLION)

FIGURE 32 VALUE OF DEALS IN WASTEWATER SURVEILLANCE MARKET, BY KEY PLAYER, 2019–2023 (USD)

FIGURE 33 NUMBER OF DEALS IN WASTEWATER SURVEILLANCE MARKET, 2019–2023 (UNITS)

FIGURE 34 AVERAGE SELLING PRICE TREND OF WASTEWATER SURVEILLANCE PRODUCTS, BY REGION, 2022–2024 (USD)

FIGURE 35 AVERAGE SELLING PRICE OF WASTEWATER SURVEILLANCE PRODUCTS, BY KEY PLAYER, 2024 (USD THOUSAND)

FIGURE 36 NORTH AMERICA: WASTEWATER SURVEILLANCE MARKET SNAPSHOT

FIGURE 37 ASIA PACIFIC: WASTEWATER SURVEILLANCE MARKET SNAPSHOT

FIGURE 38 REVENUE ANALYSIS OF KEY PLAYERS IN WASTEWATER SURVEILLANCE MARKET, 2020–2024 (USD MILLION)

FIGURE 39 MARKET SHARE ANALYSIS OF KEY PLAYERS IN WASTEWATER SURVEILLANCE MARKET (2024)

FIGURE 40 MARKET RANKING OF KEY PLAYERS IN WASTEWATER SURVEILLANCE MARKET (2024)

FIGURE 41 EV/EBITDA OF KEY PLAYERS (2025)

FIGURE 42 YEAR-TO-DATE (YTD) PRICE TOTAL RETURN AND 5-YEAR STOCK BETA OF TOP PLAYERS (2025)

FIGURE 43 WASTEWATER SURVEILLANCE MARKET: BRAND/PRODUCT COMPARATIVE ANALYSIS

FIGURE 44 WASTEWATER SURVEILLANCE MARKET: COMPANY EVALUATION

MATRIX (KEY PLAYERS), 2024

FIGURE 45 WASTEWATER SURVEILLANCE MARKET: COMPANY FOOTPRINT

FIGURE 46 WASTEWATER SURVEILLANCE MARKET: COMPANY EVALUATION

MATRIX (STARTUPS/SMES), 2024

FIGURE 47 BECKMAN COULTER, INC. (DANAHER CORPORATION): COMPANY SNAPSHOT

FIGURE 48 MERCK KGAA: COMPANY SNAPSHOT

FIGURE 49 THERMO FISHER SCIENTIFIC INC.: COMPANY SNAPSHOT

FIGURE 50 ILLUMINA, INC.: COMPANY SNAPSHOT

FIGURE 51 IDEXX LABORATORIES: COMPANY SNAPSHOT

FIGURE 52 TELEDYNE TECHNOLOGIES INCORPORATED: COMPANY SNAPSHOT

FIGURE 53 EUROFINS SCIENTIFIC: COMPANY SNAPSHOT

FIGURE 54 BIO-RAD LABORATORIES, INC.: COMPANY SNAPSHOT

FIGURE 55 QIAGEN: COMPANY SNAPSHOT

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