+357 96 030922
info@marketpublishers.com

Legionella Testing Market Forecasts to 2032 – Global Analysis By Type (Culture Methods, Urine Antigen Testing (UAT), Polymerase Chain Reaction (PCR), Serology and Direct Fluorescent Antibody (DFA) Test), Sample Type, Application, End User and By Geography

https://marketpublishers.com/r/L616C422CF67EN.html
Date: April 2025
Pages: 150
Price: US$ 4,150.00 (Single User License)
ID: L616C422CF67EN

Abstracts

According to Stratistics MRC, the Global Legionella Testing Market is accounted for $401.63 million in 2025 and is expected to reach $871.36 million by 2032 growing at a CAGR of 11.7% during the forecast period. Legionella testing is a critical process used to detect the presence of Legionella bacteria in water systems, helping to prevent Legionnaires' disease—a potentially severe form of pneumonia. Frequently carried out in cooling towers, hotels, offices, and hospitals, this testing guarantees the safety of water sources like hot tubs, plumbing systems, and ornamental fountains. Water sample collection and analysis usually entails the use of immunological assays, polymerase chain reaction (PCR), or culture techniques. Moreover, water safety management plans must include routine Legionella testing to support public health and regulatory compliance.

According to the Centers for Disease Control and Prevention (CDC), Legionella bacteria were responsible for 97% of hospitalizations and 98% of deaths resulting from reported waterborne disease outbreaks in the United States between 2015 and 2020.

Market Dynamics:

Driver:

+357 96 030922
info@marketpublishers.com

Rising rate of legionnaires illness

Legionnaires' disease outbreaks are not only dangerous but can also have serious legal and financial ramifications for facility operators. For instance, in August 2024, Victoria, Australia, recorded 71 confirmed cases and one death from Legionnaires' disease, raising public concern and regulatory scrutiny. The primary driver of the Legionella testing market is the increasing number of Legionnaires disease cases worldwide, with the CDC reporting that reported cases of the disease more than fivefold increased in the United States between 2000 and 2018. Additionally, this increasing burden of disease is forcing healthcare facilities, municipalities, and building owners to implement proactive testing protocols to detect and eradicate Legionella bacteria from water systems.

Restraint:

Expensive advanced testing technologies

Advanced detection techniques such as rapid immunoassays, polymerase chain reaction (PCR), and next-generation sequencing (NGS) are expensive despite their speed and accuracy. Adoption in smaller facilities and developing regions is frequently constrained by the expense of specialized equipment, trained personnel, and proprietary reagents. Budgetary constraints force many facilities, particularly those with limited resources, to use traditional culture methods even though they take longer to complete. Furthermore, this financial obstacle has the potential to impede market expansion, especially in areas where health infrastructure is still being developed or where Legionella is not yet a major concern.

Opportunity:

Combining intelligent water management systems

Incorporating Legionella testing into larger water quality monitoring systems is made possible by the increasing use of smart building technology, which can automatically control water temperature, identify stagnation, and notify operators of conditions that are conducive to Legionella growth. When combined with automated or remote Legionella detection, these systems can expedite testing and compliance, especially in large commercial or industrial facilities. Moreover, businesses that can provide comprehensive digital water management solutions, including Legionella detection, are well-positioned to capitalize on the smart building and facility management market sectors.

+357 96 030922
info@marketpublishers.com

Threat:

Absence of infrastructure and skilled workers

Highly skilled microbiologists or technicians are needed by many labs and field testing teams to carry out sophisticated Legionella diagnostics like PCR or culture confirmation. A lack of these qualified experts limits the scalability of services, particularly in rural or developing areas. Furthermore, in certain nations, the absence of standardized infrastructure for laboratory processing, transportation, and water sampling raises the possibility of subpar results. This lack of technical capability restricts development and undermines confidence in growing programs to control Legionella.

Covid-19 Impact:

The COVID-19 pandemic had a mixed impact on the Legionella testing market. On the one hand, water stagnation in plumbing systems during lockdowns due to widespread building closures and decreased water usage raised the possibility of Legionella growth. This led to increased awareness and a spike in testing demand, especially in hospitals, lodging facilities, and business buildings getting ready for a safe reopening. However, particularly in the early phases of the pandemic, testing activities were momentarily hindered by supply chain disruptions, site access restrictions, and decreased operational budgets. But eventually, the crisis highlighted the value of regular environmental monitoring, making Legionella testing an essential part of facility management and public health in the post-pandemic world.

The urine antigen testing (UAT) segment is expected to be the largest during the forecast period

The urine antigen testing (UAT) segment is expected to account for the largest market share during the forecast period. The main reasons for its dominance are its speed, simplicity of use, and high sensitivity, especially when it comes to identifying Legionella pneumophila serogroup 1, which causes the majority of cases of Legionnaires' disease. Because UAT can provide results using non-invasive urine samples in a matter of hours, it is the method of choice for quick diagnosis and treatment initiation in clinical and hospital settings. Moreover, a major factor in its market dominance over other testing techniques like culture, PCR, or serology is its ease of use, broad acceptance, and capacity to facilitate extensive screening during outbreak investigations.

+357 96 030922
info@marketpublishers.com

The biofilm segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the biofilm segment is predicted to witness the highest growth rate. Biofilms act as a long-term home for Legionella bacteria, shielding them from harsh environments and disinfectants. There is an increasing need for biofilm-specific testing as knowledge of the part biofilms play in recurring contamination grows. Bacteria embedded in system components and pipe surfaces can now be detected with greater accuracy owing to advanced sampling and molecular diagnostics. Additionally, the segment is growing at a significantly faster rate owing to investments in biofilm testing and the growing use of proactive water safety management programs in cooling towers, hospitals, and industrial settings.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, driven by the high adoption of advanced diagnostic technologies, broad awareness, and strict regulatory frameworks. Particularly in the United States, strict surveillance and water safety regulations have been put in place by organizations like the CDC and OSHA, which require regular testing in commercial buildings, senior living facilities, and healthcare facilities. The necessity of proactive testing has been emphasized by the existence of a well-established healthcare infrastructure, top diagnostic firms, and regular Legionella outbreaks. Furthermore, North America is now the leading regional market for Legionella testing due to strong public health campaigns and investments in infection control.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, driven by growing industrial infrastructure, fast urbanization, and growing awareness of waterborne illnesses. Water safety in hospitals, hotels, and manufacturing facilities is becoming increasingly important in countries like China, India, and Southeast Asia. Advanced Legionella testing solutions are becoming more widely used as a result of government initiatives to raise public health standards and the expansion of international diagnostic firms. Moreover, the Asia-Pacific market is expected to expand quickly as environmental health regulations tighten and infrastructure ages, making it a crucial area for industry participants to concentrate on.

Key players in the market

+357 96 030922
info@marketpublishers.com

Some of the key players in Legionella Testing Market include Danaher Corporation, Quidel Corporation, Thermo Fisher Scientific, Inc., Eurofins Scientific, IDEXX Corporation, Abbott Laboratories, Merck KGaA, Eiken Chemical Co., Ltd., Aquacert Ltd., Takara Bio, Inc., LuminUltra Technologies Ltd., Becton, Dickinson & Company, Pro-Lab Diagnostics, Inc., Qiagen N.V. and Bio-Rad Laboratories, Inc.

Key Developments:

In February 2025, Thermo Fisher Scientific Inc. announced that the company has entered into a definitive agreement with Solventum to acquire Solventum's Purification & Filtration business for approximately $4.1 billion in cash. Solventum's Purification & Filtration business is a leading provider of purification and filtration technologies used in the production of biologics as well as in medical technologies and industrial applications.

In January 2025, Danaher Corporation announced that it has signed a definitive agreement to sell its Pacific Scientific Aerospace business to Meggitt PLC, a global aerospace and defense company. Danaher simultaneously received a binding offer from Meggitt to acquire the Artus business which remains open for 12 months.

In October 2024, Eurofins Scientific has reached an agreement with SYNLAB to acquire its clinical diagnostics operations in Spain. The transaction is subject to customary conditions, including regulatory approvals, and is expected to close in 2025. SYNLAB's clinical diagnostics operations in Spain provide clinical diagnostics testing, including genetics and anatomical pathology services, throughout the country, achieving revenues of approximately €140m in 2023.

Types Covered:

Culture Methods

Urine Antigen Testing (UAT)

Polymerase Chain Reaction (PCR)

Serology

Direct Fluorescent Antibody (DFA) Test

+357 96 030922
info@marketpublishers.com

Sample Types Covered:

- Water
- Biofilm
- Swab Samples

Applications Covered:

- Water Testing
- In Vitro Diagnostics (IVD) Testing
- Other Applications

End Users Covered:

- Hospitals & Clinics
- Diagnostic Laboratories
- Water Treatment Industries
- Other End Users

Regions Covered:

- North America
  - US
  - Canada
  - Mexico

+357 96 030922
info@marketpublishers.com

- Europe
  - Germany
  - UK
  - Italy
  - France
  - Spain
  - Rest of Europe
- Asia Pacific
  - Japan
  - China
  - India
  - Australia
  - New Zealand
  - South Korea
  - Rest of Asia Pacific
- South America
  - Argentina
  - Brazil
  - Chile
  - Rest of South America

+357 96 030922
info@marketpublishers.com

- Middle East & Africa
  - Saudi Arabia
  - UAE
  - Qatar
  - South Africa
  - Rest of Middle East & Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

- Company Profiling
  - Comprehensive profiling of additional market players (up to 3)
  - SWOT Analysis of key players (up to 3)
- Regional Segmentation

+357 96 030922
info@marketpublishers.com

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

+357 96 030922
info@marketpublishers.com

Contents

1 EXECUTIVE SUMMARY

2 PREFACE

2.1 Abstract
2.2 Stake Holders
2.3 Research Scope
2.4 Research Methodology
  2.4.1 Data Mining
  2.4.2 Data Analysis
  2.4.3 Data Validation
  2.4.4 Research Approach
2.5 Research Sources
  2.5.1 Primary Research Sources
  2.5.2 Secondary Research Sources
  2.5.3 Assumptions

3 MARKET TREND ANALYSIS

3.1 Introduction
3.2 Drivers
3.3 Restraints
3.4 Opportunities
3.5 Threats
3.6 Application Analysis
3.7 End User Analysis
3.8 Emerging Markets
3.9 Impact of Covid-19

4 PORTERS FIVE FORCE ANALYSIS

4.1 Bargaining power of suppliers
4.2 Bargaining power of buyers
4.3 Threat of substitutes
4.4 Threat of new entrants
4.5 Competitive rivalry

+357 96 030922
info@marketpublishers.com

5 GLOBAL LEGIONELLA TESTING MARKET, BY TYPE

5.1 Introduction
5.2 Culture Methods
5.3 Urine Antigen Testing (UAT)
5.4 Polymerase Chain Reaction (PCR)
5.5 Serology
5.6 Direct Fluorescent Antibody (DFA) Test

6 GLOBAL LEGIONELLA TESTING MARKET, BY SAMPLE TYPE

6.1 Introduction
6.2 Water
6.3 Biofilm
6.4 Swab Samples

7 GLOBAL LEGIONELLA TESTING MARKET, BY APPLICATION

7.1 Introduction
7.2 Water Testing
  7.2.1 Microbial Culture
  7.2.2 DFA Stain
  7.2.3 PCR
7.3 In Vitro Diagnostics (IVD) Testing
  7.3.1 Blood Culture and Sputum Tests
  7.3.2 Urinary Antigen Tests
  7.3.3 DFA Stain
  7.3.4 PCR
7.4 Other Applications

8 GLOBAL LEGIONELLA TESTING MARKET, BY END USER

8.1 Introduction
8.2 Hospitals & Clinics
8.3 Diagnostic Laboratories
8.4 Water Treatment Industries
8.5 Other End Users

9 GLOBAL LEGIONELLA TESTING MARKET, BY GEOGRAPHY

+357 96 030922
info@marketpublishers.com

9.1 Introduction
9.2 North America
  9.2.1 US
  9.2.2 Canada
  9.2.3 Mexico
9.3 Europe
  9.3.1 Germany
  9.3.2 UK
  9.3.3 Italy
  9.3.4 France
  9.3.5 Spain
  9.3.6 Rest of Europe
9.4 Asia Pacific
  9.4.1 Japan
  9.4.2 China
  9.4.3 India
  9.4.4 Australia
  9.4.5 New Zealand
  9.4.6 South Korea
  9.4.7 Rest of Asia Pacific
9.5 South America
  9.5.1 Argentina
  9.5.2 Brazil
  9.5.3 Chile
  9.5.4 Rest of South America
9.6 Middle East & Africa
  9.6.1 Saudi Arabia
  9.6.2 UAE
  9.6.3 Qatar
  9.6.4 South Africa
  9.6.5 Rest of Middle East & Africa

10 KEY DEVELOPMENTS

10.1 Agreements, Partnerships, Collaborations and Joint Ventures
10.2 Acquisitions & Mergers
10.3 New Product Launch
10.4 Expansions

+357 96 030922
info@marketpublishers.com

10.5 Other Key Strategies

11 COMPANY PROFILING

11.1 Danaher Corporation
11.2 Quidel Corporation
11.3 Thermo Fisher Scientific, Inc.
11.4 Eurofins Scientific
11.5 IDEXX Corporation
11.6 Abbott Laboratories
11.7 Merck KGaA
11.8 Eiken Chemical Co., Ltd.
11.9 Aquacert Ltd.
11.10 Takara Bio, Inc.
11.11 LuminUltra Technologies Ltd.
11.12 Becton, Dickinson & Company
11.13 Pro-Lab Diagnostics, Inc.
11.14 Qiagen N.V.
11.15 Bio-Rad Laboratories, Inc.

+357 96 030922
info@marketpublishers.com

List Of Tables

LIST OF TABLES

1 Global Legionella Testing Market Outlook, By Region (2024-2032) ($MN)
2 Global Legionella Testing Market Outlook, By Type (2024-2032) ($MN)
3 Global Legionella Testing Market Outlook, By Culture Methods (2024-2032) ($MN)
4 Global Legionella Testing Market Outlook, By Urine Antigen Testing (UAT) (2024-2032) ($MN)
5 Global Legionella Testing Market Outlook, By Polymerase Chain Reaction (PCR) (2024-2032) ($MN)
6 Global Legionella Testing Market Outlook, By Serology (2024-2032) ($MN)
7 Global Legionella Testing Market Outlook, By Direct Fluorescent Antibody (DFA) Test (2024-2032) ($MN)
8 Global Legionella Testing Market Outlook, By Sample Type (2024-2032) ($MN)
9 Global Legionella Testing Market Outlook, By Water (2024-2032) ($MN)
10 Global Legionella Testing Market Outlook, By Biofilm (2024-2032) ($MN)
11 Global Legionella Testing Market Outlook, By Swab Samples (2024-2032) ($MN)
12 Global Legionella Testing Market Outlook, By Application (2024-2032) ($MN)
13 Global Legionella Testing Market Outlook, By Water Testing (2024-2032) ($MN)
14 Global Legionella Testing Market Outlook, By Microbial Culture (2024-2032) ($MN)
15 Global Legionella Testing Market Outlook, By DFA Stain (2024-2032) ($MN)
16 Global Legionella Testing Market Outlook, By PCR (2024-2032) ($MN)
17 Global Legionella Testing Market Outlook, By In Vitro Diagnostics (IVD) Testing (2024-2032) ($MN)
18 Global Legionella Testing Market Outlook, By Blood Culture and Sputum Tests (2024-2032) ($MN)
19 Global Legionella Testing Market Outlook, By Urinary Antigen Tests (2024-2032) ($MN)
20 Global Legionella Testing Market Outlook, By DFA Stain (2024-2032) ($MN)
21 Global Legionella Testing Market Outlook, By PCR (2024-2032) ($MN)
22 Global Legionella Testing Market Outlook, By Other Applications (2024-2032) ($MN)
23 Global Legionella Testing Market Outlook, By End User (2024-2032) ($MN)
24 Global Legionella Testing Market Outlook, By Hospitals & Clinics (2024-2032) ($MN)
25 Global Legionella Testing Market Outlook, By Diagnostic Laboratories (2024-2032) ($MN)
26 Global Legionella Testing Market Outlook, By Water Treatment Industries (2024-2032) ($MN)
27 Global Legionella Testing Market Outlook, By Other End Users (2024-2032) ($MN)

+357 96 030922
info@marketpublishers.com

Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

+357 96 030922
info@marketpublishers.com

I would like to order

Product name: Legionella Testing Market Forecasts to 2032 – Global Analysis By Type (Culture Methods, Urine Antigen Testing (UAT), Polymerase Chain Reaction (PCR), Serology and Direct Fluorescent Antibody (DFA) Test), Sample Type, Application, End User and By Geography

Product link: https://marketpublishers.com/r/L616C422CF67EN.html

Price: US$ 4,150.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:
info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page https://marketpublishers.com/r/L616C422CF67EN.html