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Water Testing & Analysis Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (TOC Analyzer, pH Meter, Dissolved Oxygen Meter, Conductivity Sensors, Turbidity Meter, Others), By End Use Industry (Industrial, Municipal, Others), By Region & Competition, 2021-2031F

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Abstracts

The Global Water Testing & Analysis Market is projected to expand from USD 5.88 Billion in 2025 to USD 8.29 Billion by 2031, registering a CAGR of 5.89%. This sector encompasses the instruments, reagents, and services necessary to detect biological, physical, and chemical contaminants in diverse water sources, ensuring safety and regulatory compliance. Growth is primarily driven by strict government mandates concerning drinking water quality and wastewater discharge, alongside rising public awareness of waterborne illnesses. Additionally, the rapid growth of industrial activities demands rigorous monitoring to limit environmental impact and maintain sustainable operations. This commitment to quality assurance is highlighted by 2024 data from the American Water Works Association, which indicated that 61.3 percent of utilities were actively implementing or developing source water protection plans.

Despite these positive growth indicators, the market encounters a significant obstacle due to the high costs associated with advanced testing instrumentation. The substantial capital investment required for specialized analytical devices, combined with the recurring need for skilled personnel to operate and maintain this equipment, can discourage adoption. This financial barrier is particularly severe in developing regions where restricted infrastructure budgets may limit the deployment of comprehensive water quality monitoring systems.

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Market Driver

Strict regulatory frameworks serve as the primary catalyst for the Global Water Testing & Analysis Market, forcing municipalities and industries to implement rigorous monitoring protocols. As governments enforce tighter limits on pollutants and mandate comprehensive testing for emerging contaminants, there is a growing necessity for high-precision instrumentation and frequent analysis to meet evolving standards. This regulatory pressure directly drives revenue growth for testing providers that assist utilities in maintaining essential compliance. For instance, IDEXX Laboratories reported in February 2025 that its Water business achieved 11 percent organic revenue growth for the full year 2024, reflecting solid volume gains driven by these compliance needs. Similarly, Bureau Veritas recorded a 10.2 percent organic revenue increase for 2024, underscoring healthy underlying trends in certification and testing services.

The escalating demand for water recycling and reuse is further propelling the market by creating new requirements for continuous water quality verification. As freshwater scarcity intensifies, industrial facilities are aggressively adopting closed-loop systems that require constant monitoring of treated wastewater to ensure it meets safety standards for reuse or environmental discharge. This shift toward circular water management significantly increases the volume of water requiring validation of treatment efficacy. According to Xylem's May 2025 Sustainability Report, the company's operations treated and released 1,846 megaliters of water in 2024, representing a 98 percent increase from the previous year. This surge emphasizes the critical reliance on analytical technologies to protect downstream processes and ecosystems from contamination risks associated with recycled water.

Market Challenge

The significant capital investment required for advanced analytical instrumentation constitutes a formidable barrier to the expansion of the Global Water Testing & Analysis Market. Procuring high-precision devices demands substantial upfront expenditures, which often exceed the limited financial resources available to municipal utilities and smaller industrial facilities. This economic burden is further compounded by the recurring operational expenses necessary for specialized maintenance, calibration, and the retention of technically proficient staff to manage these complex systems. Consequently, organizations facing budgetary constraints frequently defer upgrading their monitoring infrastructure, relying instead on legacy methods that stifle the adoption of modern analysis technologies.

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This financial strain effectively restricts market penetration, particularly in sectors where infrastructure renewal competes for limited funds. According to the American Water Works Association, in 2025, only 41 percent of utilities reported feeling very or fully able to cover their costs through rates and fees. Such fiscal tightness directly hampers the ability of water providers to invest in comprehensive testing solutions. As facilities prioritize essential structural repairs over equipment acquisition, the market potential for premium analysis tools remains constrained, slowing overall industry growth.

Market Trends

The proliferation of IoT-enabled real-time monitoring systems is fundamentally reshaping the sector by transitioning water quality management from periodic manual sampling to continuous, remote data acquisition. Utilities and industrial operators are increasingly deploying interconnected sensor networks that transmit instant updates on critical parameters such as pH, turbidity, and residual chlorine, thereby enabling immediate responses to infrastructure failures or contamination events. This operational shift is rapidly translating into financial growth for providers of digital metering and analytical instrumentation. According to Badger Meter in January 2025, utility water sales grew 20 percent for the full year 2024, a surge directly attributed to the market adoption of cellular Advanced Metering Infrastructure (AMI) and integrated water quality monitoring solutions.

Simultaneously, the intensified focus on PFAS and microplastics analysis is driving a specialized market segment dedicated to the detection of persistent organic pollutants. Unlike standard compliance testing, the identification of per- and polyfluoroalkyl substances requires highly sensitive liquid chromatography and mass spectrometry instruments capable of measuring parts-per-trillion concentrations. This demand is compelling laboratories to invest heavily in high-precision equipment to identify these "forever chemicals" within drinking water and environmental samples. According to Waters Corporation's May 2025 Annual Report, the company?s PFAS testing revenue grew over 40 percent for the year 2024, underscoring the significant industry shift toward advanced analytical technologies designed specifically for emerging contaminant detection.

Key Market Players

ABB Limited

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SUEZ SA

Danaher Corporation

Thermo Fisher Scientific Inc.

Emerson Electric Company

Endress+Hauser Group Services AG

Agilent Technologies, Inc.

Shimadzu Corporation

Mettler Toledo

HORIBA Group

Report Scope

In this report, the Global Water Testing & Analysis Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Water Testing & Analysis Market, By Type

TOC Analyzer

pH Meter

Dissolved Oxygen Meter

Conductivity Sensors

Turbidity Meter

Others

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Water Testing & Analysis Market, By End Use Industry

- Industrial
- Municipal
- Others

Water Testing & Analysis Market, By Region

- North America
  - United States
  - Canada
  - Mexico
- Europe
  - France
  - United Kingdom
  - Italy
  - Germany
  - Spain
- Asia Pacific
  - China
  - India
  - Japan
  - Australia

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South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Water Testing & Analysis Market.

Available Customizations:

Global Water Testing & Analysis Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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