

# **Global Wastewater Surveillance Market Size Study & Forecast, by Type (Instruments & Equipment [Samplers, Ultracentrifuge, qPCR, Portable], Assays & Kits, Consumables), by Application (Pathogen Detection, AMR Tracking), Sampling Method (Grab Sampling, Composite Sampling, Passive Sampling), Component (Hardware, Software, Services) and Regional Forecasts 2025-2035**

<https://marketpublishers.com/r/G0A99E46EE94EN.html>

Date: March 2026

Pages: 285

Price: US\$ 3,750.00 (Single User License)

ID: G0A99E46EE94EN

## **Abstracts**

The Global Wastewater Surveillance Market is valued at approximately USD 0.82 billion in 2024 and is projected to expand at a steady CAGR of 6.70% throughout the forecast period of 2025–2035, with historical reference points firmly anchored in 2023 and 2024 and 2024 serving as the base year for estimation. Wastewater surveillance refers to the systematic monitoring and analysis of wastewater streams to detect biological markers, pathogens, and antimicrobial resistance (AMR) trends within communities. By capturing population-level health signals in near real time, this approach has rapidly evolved from a niche research tool into a strategic public health instrument, increasingly leaned into by governments, utilities, and healthcare systems worldwide.

The market's upward trajectory is being shaped by heightened awareness around pandemic preparedness, early outbreak detection, and data-driven public health decision-making. Lessons carried forward from COVID-19 have catalyzed investments into decentralized monitoring infrastructure, advanced molecular diagnostics, and digital epidemiology platforms. As urban populations swell and sanitation networks expand, wastewater surveillance is being increasingly built into smart city frameworks, environmental monitoring programs, and national disease surveillance strategies.

However, challenges such as fragmented regulatory standards, data interpretation complexity, and funding constraints in low-income regions continue to temper adoption rates, even as technological innovation steadily chips away at these barriers.

**The detailed segments and sub-segments included in the report are:**

By Type:

Instruments & Equipment

Samplers

Ultracentrifuge

qPCR

Portable

Assays & Kits

Consumables

By Application:

Pathogen Detection

AMR Tracking

By Sampling Method:

Grab Sampling

Composite Sampling

Passive Sampling

## By Component:

Hardware

Software

Services

Pathogen detection is expected to dominate the Global Wastewater Surveillance Market over the forecast period, accounting for the largest share of deployment across municipal, institutional, and research settings. This dominance is being reinforced by the growing need to track viral and bacterial outbreaks at a community scale, enabling authorities to roll out timely interventions before clinical cases overwhelm healthcare systems. From respiratory viruses to enteric pathogens, wastewater-based epidemiology has proven its ability to surface trends earlier than traditional diagnostic pathways, positioning pathogen detection as the backbone application driving market expansion.

From a revenue contribution perspective, instruments and equipment currently command the largest share of the market, underpinned by substantial upfront investments in sampling systems, ultracentrifugation units, and advanced qPCR platforms. These capital-intensive components form the foundation of surveillance programs, particularly in developed regions where large-scale, continuous monitoring is being scaled up. At the same time, assays, kits, and consumables generate recurring revenue streams and are gaining momentum as testing frequency increases and surveillance networks mature. This interplay creates a balanced revenue model where hardware establishes entry, while consumables sustain long-term market value.

North America continues to anchor the Global Wastewater Surveillance Market, driven by strong public health infrastructure, early technology adoption, and sustained funding for environmental monitoring initiatives. Europe follows closely, supported by stringent water quality regulations, cross-border disease surveillance programs, and collaborative research ecosystems. Asia Pacific is poised to register the fastest growth through 2035, as rapid urbanization, rising healthcare investments, and growing awareness of population-scale monitoring push governments in countries such as China, Japan, and Australia to scale up wastewater-based epidemiology. Meanwhile, Latin America and the Middle East & Africa are gradually gaining traction, particularly through pilot programs and international funding support aimed at strengthening disease surveillance

capabilities.

**Major market players included in this report are:**

Thermo Fisher Scientific Inc.

Danaher Corporation

Agilent Technologies, Inc.

Merck KGaA

Bio-Rad Laboratories, Inc.

QIAGEN N.V.

PerkinElmer Inc.

Roche Diagnostics

Hach Company

IDEXX Laboratories, Inc.

Shimadzu Corporation

Abbott Laboratories

Illumina, Inc.

Bruker Corporation

Siemens Healthineers AG

**Global Wastewater Surveillance Market Report Scope:**

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period - 2025-2035

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent to up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope\*

The objective of the study is to define the market size of the Global Wastewater Surveillance Market across its key segments and regions in recent years and to project its evolution over the coming decade. The report integrates qualitative insights with quantitative modeling to illuminate growth drivers, structural bottlenecks, and emerging opportunities that will shape future adoption. It further dissects the competitive landscape, evaluating product portfolios, strategic initiatives, and innovation pipelines of leading players, while spotlighting micro-markets where stakeholders can channel investments for sustainable, long-term returns.

### **Key Takeaways:**

Market estimates and forecasts for 10 years from 2025 to 2035.

Annualized revenues and regional-level analysis for each market segment.

Detailed geographical assessment with country-level insights across major regions.

Competitive landscape analysis highlighting leading market participants.

Strategic evaluation of business approaches and future market positioning.

In-depth analysis of the competitive structure shaping industry dynamics.

Comprehensive demand-side and supply-side assessment of the market.

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