

Global Antimicrobial Susceptibility Testing Products Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Antimicrobial Susceptibility Testing Products market size is expected to reach \$ 6444 million by 2032, rising at a market growth of 5.5% CAGR during the forecast period (2026-2032).

Antimicrobial Susceptibility Testing Products are a group of diagnostic and laboratory products used to evaluate, under in vitro conditions, how bacteria, yeasts, and certain other microorganisms respond to antimicrobial agents, and to generate categorical susceptible/intermediate/resistant results or quantitative minimum inhibitory concentration outputs. In commercial form, they include benchtop or floor-standing automated AST analyzers, integrated ID/AST systems, rapid phenotypic AST instruments, as well as AST cards, panels, microplates, susceptibility discs, gradient diffusion strips, Mueller-Hinton agar and broth media, together with dispensers, reading modules, software, and quality-control accessories. Their technical basis mainly relies on disk diffusion, broth microdilution, agar dilution, gradient diffusion, and newer rapid phenotypic imaging or microfluidic approaches that determine whether microbial growth is inhibited at defined antimicrobial concentrations. Commercial supply is provided by clinical microbiology IVD manufacturers, culture media and AST consumables producers, laboratory automation companies, and rapid AST innovators. These products are primarily used in hospital microbiology laboratories, independent clinical labs, public-health and reference laboratories, veterinary diagnostics, pharmaceutical R&D, and selected food, agriculture, and environmental microbiology settings.

The global antimicrobial resistance burden continues to reinforce the structural demand for Antimicrobial Susceptibility Testing Products. Hospitals are under increasing pressure to provide effective therapy recommendations earlier, shorten empirical broad-spectrum antibiotic exposure, and support antimicrobial stewardship programs, which is

driving laboratories to upgrade from traditional manual testing toward more automated, standardized, and faster-turnaround solutions. Bloodstream infection, sepsis, intensive care, and other high-resistance settings are the most time-sensitive use cases, making rapid phenotypic AST technologies that work directly from positive blood cultures or within shorter incubation workflows a major growth opportunity. At the same time, the launch of new antimicrobials and combination therapies requires constant updates of AST panels, breakpoint databases, expert rules, and interpretation software, favoring suppliers that can offer integrated instrument, consumable, software, and rule-engine capabilities.

The main market constraints come from methodology, regulation, and commercialization. AST results must remain aligned with CLSI, EUCAST, and national regulatory requirements, while breakpoint changes, new resistance mechanisms, and limited coverage for rare organisms raise validation and maintenance costs. Rapid AST has clear clinical value, but real-world purchasing is still constrained by budgets, installed-base economics, laboratory workflow redesign, LIS connectivity, quality-control complexity, and local registration timing. For many small and mid-sized laboratories, conventional discs, microdilution panels, and semi-automated systems still hold an obvious cost advantage, so penetration of high-end rapid AST platforms is unlikely to occur in a single step. In addition, regulatory boundaries between clinical, veterinary, research, and industrial use differ across countries, increasing the burden of multi-region registration, comparative studies, and supply-chain localization for global expansion.

Downstream demand is evolving along two main paths. The first is the clinical shift from merely performing AST to delivering results faster, in a more standardized way, and with better workflow integration; this is increasing demand for integrated ID/AST systems, rapid AST platforms linked to blood-culture workflows, automated reading and middleware, standardized media, and quality-control consumables. The second is boundary expansion beyond human clinical diagnostics. Veterinary diagnostics, public-health surveillance, resistance epidemiology, antimicrobial drug development, and selected food and agricultural microbiology applications are all increasing their use of quantitative and traceable AST tools. The future market is therefore unlikely to be driven by a single analyzer alone; instead, it is moving toward a composite revenue model built around instruments, cards/panels/strips/discs, media, software databases, and ongoing rule-update services, with consumables and interpretation maintenance continuing to gain value.

This report studies the global Antimicrobial Susceptibility Testing Products demand, key

companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Antimicrobial Susceptibility Testing Products, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Antimicrobial Susceptibility Testing Products that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Antimicrobial Susceptibility Testing Products total market, 2021-2032, (USD Million)

Global Antimicrobial Susceptibility Testing Products total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Antimicrobial Susceptibility Testing Products total market, key domestic companies, and share, (USD Million)

Global Antimicrobial Susceptibility Testing Products revenue by player, revenue and market share 2021-2026, (USD Million)

Global Antimicrobial Susceptibility Testing Products total market by Type, CAGR, 2021-2032, (USD Million)

Global Antimicrobial Susceptibility Testing Products total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Antimicrobial Susceptibility Testing Products market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Danaher, Thermo Fisher Scientific, BD, bioMérieux, Merck, Sysmex, Mindray, Bio-Rad, Bruker, Eiken Chemical, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Antimicrobial Susceptibility Testing Products market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Type, and by Application. Data is given for the years

2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Antimicrobial Susceptibility Testing Products Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Antimicrobial Susceptibility Testing Products Market, Segmentation by Type:

AST Instruments and Systems

AST Test Consumables

AST Media and Reagents

AST Software and Data Tools

Others

Global Antimicrobial Susceptibility Testing Products Market, Segmentation by Core Testing Principle:

Diffusion-based AST

Dilution-based AST

Growth Kinetics or Imaging-based AST

Microfluidic Rapid Phenotypic AST

Genotypic or Resistance-marker-guided Testing

Others

Global Antimicrobial Susceptibility Testing Products Market, Segmentation by Automation Level:

Manual AST Products

Semi-automated AST Products

Fully Automated AST Products

Global Antimicrobial Susceptibility Testing Products Market, Segmentation by Delivery Format:

Capital Equipment

Single-use Test Consumables

Media and Supporting Supplies

Software, Database and Interpretation Tools

Others

Global Antimicrobial Susceptibility Testing Products Market, Segmentation by Application:

Clinical Diagnostics

Drug Discovery and Development

Epidemiology

Others

Companies Profiled:

Danaher

Thermo Fisher Scientific

BD

bioMérieux

Merck

Sysmex

Mindray

Bio-Rad

Bruker

Eiken Chemical

Copan Diagnostics

Q-linea

QuantaMatrix

HiMedia Laboratories

Liofilchem

Autobio Diagnostics

Mast Group

Erba Lachema

Alifax

ZHUHAI DL BIOTECH

Kyokuto Pharmaceutical Industrial

Condalab

Titan Biotech

Guangdong Huankai Microbial

Bioanalyse

Synbiosis

Biolife Italiana

Gradientech

Selux Diagnostics

iFAST Diagnostics

Key Questions Answered

1. How big is the global Antimicrobial Susceptibility Testing Products market?
2. What is the demand of the global Antimicrobial Susceptibility Testing Products market?
3. What is the year over year growth of the global Antimicrobial Susceptibility Testing Products market?

4. What is the total value of the global Antimicrobial Susceptibility Testing Products market?
5. Who are the Major Players in the global Antimicrobial Susceptibility Testing Products market?
6. What are the growth factors driving the market demand?

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