

Global Antimicrobial Susceptibility Testing Products Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Antimicrobial Susceptibility Testing Products market size is predicted to grow from US\$ 4206 million in 2025 to US\$ 6246 million in 2032; it is expected to grow at a CAGR of 5.8% from 2026 to 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.

LPI (LP Information)' newest research report, the "Antimicrobial Susceptibility Testing

Products Industry Forecast? looks at past sales and reviews total world Antimicrobial Susceptibility Testing Products sales in 2025, providing a comprehensive analysis by region and market sector of projected Antimicrobial Susceptibility Testing Products sales for 2026 through 2032. With Antimicrobial Susceptibility Testing Products sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Antimicrobial Susceptibility Testing Products industry.

This Insight Report provides a comprehensive analysis of the global Antimicrobial Susceptibility Testing Products landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Antimicrobial Susceptibility Testing Products portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Antimicrobial Susceptibility Testing Products market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Antimicrobial Susceptibility Testing Products and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Antimicrobial Susceptibility Testing Products.

This report presents a comprehensive overview, market shares, and growth opportunities of Antimicrobial Susceptibility Testing Products market by product type, application, key players and key regions and countries.

Segmentation by Type:

AST Instruments and Systems

AST Test Consumables

AST Media and Reagents

AST Software and Data Tools

Others

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

Segmentation by Automation Level:

Manual AST Products

Semi-automated AST Products

Fully Automated AST Products

Segmentation by Delivery Format:

Capital Equipment

Single-use Test Consumables

Media and Supporting Supplies

Software, Database and Interpretation Tools

Others

Segmentation by Application:

Clinical Diagnostics

Drug Discovery and Development

Epidemiology

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

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

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