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Antimicrobials Market Assessment, By Type [Antibacterial, Antifungal, Antiviral, Others], By Drug Class [Penicillin, Cephalosporin, Aminoglycosides, Fluoroquinolones, Others], By Grade [Natural, Semi-Synthetic, Synthetic], By Dosage Form [Powder, Tablet, Solution, Liquid, Others], By Distribution Channel [Hospital Pharmacy, Retail Pharmacy, Online Pharmacy], By Region, Opportunities and Forecast, 2018-2032F

https://marketpublishers.com/r/ABB9C1DEDD6BEN.html
Date: February 2025
Pages: 251
Price: US$ 4,500.00 (Single User License)
ID: ABB9C1DEDD6BEN

Abstracts

Global antimicrobials market is projected to witness a CAGR of 4.70% during the forecast period 2025-2032, growing from USD 45.67 billion in 2024 to USD 65.95 billion in 2032.

The discovery of antimicrobials has benefited various sectors progressively with the adopted innovations. The incorporated antimicrobials deliver specific characteristics based on the group they belong to. Specific mechanisms, such as inhibiting protein, cell wall, and nuclei acid synthesis, depolarize the cell membrane and inhibit metabolic pathways in bacteria. Antimicrobial peptides have the potential to impart either antimicrobial or anticancer activities that subsequently disrupt microbial cell membranes by making proper interaction with negatively charged phospholipids. Antimicrobials have extensive involvement in the agri-food sector, which is responsible for imprudent use, and their prominent contribution to resistance can diminish the concerns for health emergencies.

Adoption of Regulations Boosting Market Growth

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The numerous benefits of antimicrobial agents can be recognized across various sectors, including health treatments. Despite several advantages, inappropriate usage of antimicrobial agents within healthcare facilities can decisively lead to the acquisition of nosocomial infections, drug toxicity, unwanted resistance build-up, etc. The World Health Organization (WHO) has framed effective regulations on different quantities and combinations for using antimicrobial agents in pharmaceuticals. Fixed doses of antimicrobial combinations can be banned if not approved by national or international guidelines. Stringent legislation has been implemented functionally, regulating the antimicrobials prescribed by qualified healthcare professionals. Several antimicrobial awareness campaigns, such as World Antibiotic Awareness Week held in November each year between the dates 8-14 by the World Health Organization (WHO) and similar relevant campaigns, are frequently organized to address the benefits of antimicrobials and their consumption in the prescribed form. Scientifically validated clinical studies have been provided with specific regulations to justify the choice and level of antimicrobial agents to be incorporated in health-related applications. For instance, in January 2024, to limit the misuse of antimicrobial drugs, the Central Government of India announced that it is mandatory for all doctors to write ‘exact indications’ while prescribing these drugs.

Growing Incidences of Infectious Diseases to Fuel Market Growth

One of the key factors propelling the global antimicrobial industry and greatly impacting its growth trajectory is the rising prevalence of infectious diseases. The need for efficient antimicrobial therapies has increased due to the rise of illnesses, including HIV, malaria, tuberculosis, and other bacterial infections. The prevalence of infectious diseases is increasing due to several variables. Increased international travel and urbanization speed up the spread of diseases, and climate change fosters an environment that is conducive to the spread of diseases. For instance, according to the WHO Global Tuberculosis Report 2024, around 10.8 million people have been diagnosed with TB globally. The report further stated that India, Indonesia, China, the Philippines, and Pakistan together accounted for 56% of the total global burden.

Furthermore, the problem has been worsened by the lack of proper healthcare infrastructure in underdeveloped nations, which makes it difficult to control outbreaks efficiently. The COVID-19 pandemic increased the need for efficient infection control methods and brought attention to weaknesses in healthcare systems. In order to fight these infections, there is a constant need for novel and enhanced antimicrobial drugs. The continuous demand for potent antimicrobial remedies not only propels market

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expansion but also stimulates pharmaceutical industry innovation, resulting in the creation of innovative therapies that can successfully combat new pathogenic threats.

Antibacterial Drug Segment Dominates the Market

The growing incidence of bacterial infections and the growing need for efficient treatment alternatives have propelled the antibacterials segment to the top of the global antimicrobial market. Since they are widely used to treat a variety of illnesses, including respiratory and urinary tract infections, antibacterials—in particular, penicillin and cephalosporins—dominate this market category. Due to its proven use in both developed and developing nations, as well as its efficacy against a wide range of bacterial infections, the penicillin category alone accounted for a sizeable portion of the market. Furthermore, research and development attempts to produce more effective antibacterial agents have been sparked by the increased knowledge of antibiotic resistance. Novel formulations and delivery systems are being researched to improve efficacy against resistant strains. For instance, in November 2024, the Biotechnology Industry Research Assistance Council (BIRAC), a unit of the Department of Biotechnology in collaboration with Wockhardt Ltd., introduced India’s first indigenous Nafithromycin antibiotic to treat resistant infections. The antibiotic has been launched under the trade name 'Miqnaf' by Wockhardt Ltd. The company has invested around 14 years and USD 65 million (INR 550 crores) into research and development of Nafithromycin, with clinical trials spanning the U.S., Europe, and India.

Antibacterials are still mostly consumed by the healthcare industry, which uses them widely in clinics and hospitals to prevent and treat infections. Antibacterial demand is predicted to increase further as healthcare infrastructure worldwide, particularly in emerging nations, improves. This pattern highlights the significance of antibacterials in the antimicrobial market as a whole, making them a key area of concentration for pharmaceutical firms looking to address public health issues successfully.

North America Holds the Dominant Share in Antimicrobials Market

The global antimicrobial market is dominated by North America, which greatly impacts its expansion and advancement. Numerous reasons contribute to this supremacy, such as the region's sophisticated healthcare infrastructure and large investments in research and development of novel antimicrobial medicines. For Instance, in the U.S., influenza and pneumonia caused 41,917 deaths in 2022, according to the Centers for Disease Control and Prevention. This concerning figure highlights the urgent need for potent antimicrobial medicines and cutting-edge therapies, which will increase market demand.

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Furthermore, the United States enjoys the advantages of a strong regulatory environment that facilitates drug approval procedures and motivates pharmaceutical firms to create novel antibiotics and substitutes. Campaigns for safe antibiotic use have been sparked by growing public knowledge of antibiotic resistance and the negative effects of abuse. Major companies actively working on creating new treatments to fight resistant bacterial strains are also part of the pharmaceutical industry in the United States. As a result, the United States is a key factor in the future expansion of this industry since it not only holds a dominant market share but also plays a significant role in influencing worldwide antimicrobial tactics and advancements.

Future Market Scenario (2025-2032F)

Technological advancements like PCR promise faster and more accurate results, leading us to the early diagnosis of the disease. Opportunity also lies in the increasing number of viral infections the globe faces today. Developing vaccines or a cure for diseases that are still not curable is a challenge that the whole healthcare community is facing at the moment. Promising moves of governments in their countries that provide healthcare infrastructure, funds to carry on research and development on a large scale, and a reliable distribution channel that ensures the solution reaches everyone is testimonial. For instance, in India, the Infectious Disease Biology Program aims to provide solutions to infectious diseases of global concern such as HIV/AIDS, tuberculosis, vector-borne diseases; emerging or re-emerging threats such as influenza, Japanese Encephalitis, and antibiotic-resistant microbes in terms of therapeutics, diagnostics, and preventive measures. The Program supports R&D projects to achieve the Sustainable Development Goals of ending the epidemics of AIDS, TB, malaria, and neglected tropical diseases and combat hepatitis, water-borne diseases, and other communicable diseases by 2030.

Key Players Landscape and Outlook

Key players in the antimicrobials industry are utilizing strategies such as mergers, acquisitions, partnerships, and new product launches to improve their services and competitiveness. Such efforts will propel significant growth in the market, allowing large-cap industry players to increase their presence and, therefore, find new opportunities in this market.

In May 2023, Innoviva Specialty Therapeutics Inc. got FDA approval for XACDURO (durlobactam for injection; sulbactam for injection), co-packaged for intravenous use.

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For instance, in April 2023, Baxter International Inc. launched ZOSYN in the United States (piperacillin and tazobactam) Injection.

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