

Antimicrobial Resistance Surveillance - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Antimicrobial Resistance Surveillance Market size is estimated at USD 5.90 billion in 2024, and is expected to reach USD 7.80 billion by 2029, growing at a CAGR of 5.70% during the forecast period (2024-2029).

The emergence of the COVID-19 pandemic had a mixed impact on the antimicrobial resistance surveillance market. The market was impacted during the pandemic owing to the overload of healthcare services, and most diagnostic labs diverted their complete focus to COVID-19 tests, which led to a reduction in the identification and tracking of antimicrobial-resistant bacteria during the pandemic period. According to the World Health Organization (WHO) Global Antimicrobial Resistance and Use Surveillance System (GLASS) Report 2022, COVID-19 significantly impacted antimicrobial surveillance during the first wave of the pandemic. Most countries that contribute antimicrobial resistance surveillance data to the WHO GLASS database cannot provide data during the peak stage of the pandemic. However, according to the same report, many countries have increased their laboratory capabilities and other antimicrobial surveillance system-strengthening efforts post-pandemic. This is expected to accelerate the antimicrobial resistance surveillance market during the forecasted period.

The major factors driving the market are the rising prevalence of infections caused by drug-resistant microbes, rising initiatives by governments to tackle infectious diseases, and emerging multi-drug resistance due to drug abuse. The WHO has declared antimicrobial resistance as a major threat to humanity. According to The European Centre for Disease Prevention and Control (ECDC) 2023 Report, each year, more than 670,000 infections occur in the European Union region due to bacteria resistant to antibiotics. This infection outbreak is majorly due to overuse or misuse of antibiotics.

Furthermore, according to the Organization for Economic Cooperation and Development (OECD) 2023 data, the European Union spends 1.1 billion every year to combat antimicrobial Resistance infections (AMR). To reduce misuse and overuse of antimicrobial agents' proper surveillance of AMR is needed to collect up-to-date information which helps doctors and patients make informed decisions about AMR treatment options; hence, WHO introduced the Global Antimicrobial Resistance and Use Surveillance System (GLASS), which collects antimicrobial resistance microbes' data from 190 countries across the world every year. Thus, increasing the prevalence rate of antimicrobial resistance infections and accelerated surveillance to control AMR efforts of WHO to combat antimicrobial resistance microbes are expected to drive the antimicrobial resistance surveillance market.

Moreover, rising initiatives by governments to tackle infectious diseases will likely accelerate the market. Different nations across the world have taken initiatives to control the complex problem of antimicrobial resistance (AMR) by enhancing surveillance measures, promoting research and development activities, and collaborative actions to control antimicrobial resistance agents. For instance, the United States has launched the National Action Plan for Combating Antibiotic-Resistant Bacteria (CARB), 2020-2025. This initiative by the government will focus on five objectives: increasing stringing surveillance is one major objective to control the prevalence rate and mortality rate due to antimicrobial resistance infections. In addition, Asian countries like India also launched a Nation Action Plan (NAP) for antimicrobial resistance, which also focuses on the surveillance of antibiotic-resistant microbes. Hence, collective efforts of governments are expected to accelerate the antimicrobial resistance surveillance market.

Furthermore, the emergence of multi-drug resistance due to drug abuse is leading to an emergency crisis. There are many infecting agents (e.g., bacteria, fungi, viruses, and parasites) that can cause Multi-Drug Resistance such microbes are known as 'superbugs.' The major cause of MDR is overuse of OTC antibiotics and inadequate sanitary conditions maintenance. For Instance, According to Springer Nature Report 2023, the prevalence rate of MDR is 450,000 in 2021, which increased from 430,000 cases from the previous year. Hence, the emergence of multi-drug resistance is expected to lead to high surveillance efforts, which will likely drive the Antimicrobial Resistance Surveillance Market.

However, the higher cost of antimicrobial resistance surveillance systems and kits will likely restrain the growth of the antimicrobial resistance surveillance market.

Antimicrobial Resistance Surveillance Market Trends

The Clinical Diagnostics Under Application Segment is Expected to Hold a Significant Share in the Market

Clinical diagnostics occupy a significant market share due to the increased prevalence rate of antimicrobial resistance microbial infections and the urgent need to improve patient outcomes for those suffering from antimicrobial infections like ESKAPE (Enterococcus faecium, Staphylococcus aureus, Klebsiella pneumoniae, Acinetobacter baumannii, Pseudomonas aeruginosa, and Enterobacter species) because they represent the great threat to humans. In addition, the government's initiatives to improve clinical diagnostics centers working capabilities are also expected to drive the market. For example, according to the Department of Finance Canada Report 2022, the federal government introduced Bill C-17, which was to provide 2 billion (CAD) to different provinces and territories of the country to improve clinical diagnostic activities to control various diseases like infections caused by drug-resistant microbes. Additionally, in 2021, 25 European Union countries also launched national action plans to tackle antimicrobial resistance by investing 1.4 billion (EUR) to support ongoing surveillance of AMR through enhanced laboratory network capacity across the EU region.

Therefore, the higher prevalence rate of antimicrobial resistance infection, the urgent need to improve patient outcomes, and government investments are expected to boost the clinical diagnostic segment, which is estimated to witness significant growth over the forecast period.

North America is Expected to Dominate the Antimicrobial Resistance Surveillance Market

North America is expected to dominate the market owing to factors such as high awareness and prevalence rate of antimicrobial resistance to infectious diseases, government initiatives in the region to combat antibiotic resistance, and the presence of key market players in the region. According to the Centers for Disease Control and Prevention (CDC) database 2023, in the United States, more than 2.8 million antimicrobial-resistant infections (ARI) occur every year. To combat the prevalence rate of ARI, the United States government has invested 197 million (USD) in 2023. According to the CDC, these investments are expected to be used to develop preventive solutions and effective diagnosis and surveillance of antibiotic-resistant

infections in the CDC's Antimicrobial Resistance Laboratory Network networks (AR Lab Network). These cutting-edge laboratory facilities rapidly detect and store data about antimicrobial resistance, which will likely help doctors make informed decisions about the treatment.

Therefore, owing to the high prevalence rate of antimicrobial resistance microbial infections, increased investments to fight ARI by establishing new laboratory facilities are expected to drive the market in the North American region.

Antimicrobial Resistance Surveillance Industry Overview

The antimicrobial resistance surveillance market is moderately consolidated and competitive due to the presence of many players. The market's major players are concentrating on joint ventures, strategic alliances, introducing new products, and geographic growth into developing and economically advantageous areas. Some of the major players include Thermo Fisher Scientific, Pfizer Inc., Cepheid, Accelerate Diagnostics, In, Liofilchem S.r.l., Becton Dickinson and Company, Biomerieux, Bruker, Merck KgaA, Bio-Rad Laboratories, Inc., Qiagen, SyntBioLab INC, Sysmex Inostics, Guardant Health, Inc, Exact Sciences Corporation.

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