

Wastewater Surveillance Market by Product (Instruments & Equipment (Samplers, Ultracentrifuge, qPCR, Portable), Assays & Kits, Consumables), Application (Pathogen Detection, AMR Tracking), End User (Public Health, Govt, Hospitals) - Global Forecast to 2030

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Report description:

The global wastewater surveillance market is projected to reach USD 1.22 billion by 2030, up from an estimated USD 0.88 billion in 2025, at a CAGR of 6.7% during the forecast period. This market growth is driven by various factors, including the increasing need for early detection of public health threats, more government initiatives and funding for wastewater-based epidemiology, and technological advances in molecular diagnostics and sequencing platforms. The COVID-19 pandemic has further confirmed the importance of wastewater surveillance as a dependable tool for monitoring community-level disease outbreaks. Wastewater surveillance is expanding beyond pandemic tracking to encompass antimicrobial resistance, illicit drug consumption patterns, and industrial pollution. The use of smart sensors, cloud-based data analytics, and automated sampling systems is making surveillance more scalable and cost-effective. These developments, along with rising public-private collaborations and regulatory support, are expected to propel the ongoing adoption of wastewater-based monitoring systems globally.

<https://mnmimg.marketsandmarkets.com/Images/overview-wastewater-surveillance-market.webp>

"Software solutions are expected to register the highest CAGR in the product type market during the study period."

Software solutions are expected to see the highest growth in the wastewater surveillance market due to the increasing demand for real-time data analytics, automated reporting, and predictive modeling. As surveillance programs expand, the volume of data generated from pathogen detection, sampling sites, and temporal trends is increasing rapidly, making manual processing inefficient. Advanced software platforms enable seamless integration of laboratory results, GIS mapping, trend visualization, and

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AI-based outbreak prediction, which greatly improves decision-making and response times. Governments, utilities, and research institutions are investing in digital infrastructure to enhance surveillance accuracy, optimize resource use, and meet regulatory requirements. Additionally, the move toward smart city development and digital public health systems across the Asia Pacific, North America, and Europe is boosting the demand for scalable, interoperable software solutions. Cloud-based platforms also support centralized monitoring across multiple sites, making them highly attractive for regional and national programs. As stakeholders focus on cost-efficiency, real-time insights, and actionable intelligence, software will play a crucial role in expanding wastewater surveillance systems worldwide.

"The government & regulatory agency held the largest share of the wastewater surveillance end user market in 2024."

Governments and regulatory agencies dominate the wastewater surveillance market because of their key role in public health, environmental protection, and epidemic response. These organizations mainly oversee the monitoring and control of infectious diseases, water safety, and the enforcement of environmental laws. They fund large-scale surveillance initiatives, require pathogen testing in wastewater, and often implement early warning systems to monitor community health. During global health emergencies like the COVID-19 pandemic, many nations used wastewater-based epidemiology as a cost-effective, non-invasive way to identify outbreaks. Regulatory agencies also collaborate with research institutions and private companies to standardize testing procedures and incorporate data into national health plans. Their capacity to manage budgets, expand infrastructure, and enforce policies grants them significant influence, making them the largest and most consistent users in the market.

"The Asia Pacific regional segment is expected to register the highest CAGR in the wastewater surveillance regional market during the forecast period."

The Asia Pacific region is expected to achieve the highest CAGR in the wastewater surveillance market due to a mix of environmental, healthcare, and infrastructural factors. Rapid urbanization and industrialization have significantly increased wastewater production across countries like China, India, Indonesia, and Vietnam, creating a need for better monitoring systems to protect the environment and public health. Governments in the area are increasingly adopting wastewater-based epidemiology (WBE) to monitor infectious diseases such as COVID-19 and antimicrobial resistance, especially in densely populated urban centers. Countries like Japan and South Korea are already integrating wastewater surveillance into their broader disease control strategies. Additionally, the growth of smart city projects and digital water infrastructure is enabling real-time pathogen tracking and early outbreak detection. Meanwhile, rising awareness about the importance of environmental diagnostics and sustainability is boosting demand for innovative solutions such as PCR-based detection kits, biosensors, and data analytics platforms. The region's large population, increasing health surveillance requirements, and new environmental compliance policies all contribute to its strong growth prospects in the wastewater surveillance market.

A breakdown of the primary participants referred to for this report is provided below:

-□By Company: Tier 1 (35%), Tier 2 (45%), and Tier 3 (20%)

-□By Designation: C-level Executives (35%), Director-level Executives (25%), and Others (40%)

-□By Region: North America (40%), Europe (30%), Asia Pacific (20%), Latin America (5%), and the Middle East & Africa (5%)

Prominent players in the waste water surveillance market include Thermo Fisher Scientific (US), Bio-Rad Laboratories (US), IDEXX Laboratories (US), Eurofins Scientific (Luxembourg), GT Molecular (US), Illumina (US), Oxford Nanopore (UK), Hach (Danaher) (US), Teledyne ISCO (US), LuminUltra (Canada), Biobot Analytics (US), Modern Water (DeepVerge) (UK), Promega (US), Aquamonitrix (Ireland), PathogenDx (US), Zymo Research (US), Kando (Israel), 4sight Analytics (US), among others.

Research Coverage

-□The report studies the wastewater surveillance market based on brand, product type, procedure, end user, and region.

-□The report analyzes factors (such as drivers, restraints, opportunities, and challenges) affecting market growth.

-□The report evaluates the opportunities and challenges in the market for stakeholders and provides details of the competitive

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landscape for market leaders.

-□The report studies micro markets with respect to their growth trends, prospects, and contributions to the global wastewater surveillance market.

-□The report forecasts the revenue of market segments with respect to five major regions.

Key Benefits of Buying this Report

This report is valuable for both new and existing players in the market, providing essential information to identify potential investment opportunities. It offers a comprehensive overview of both major and minor competitors, aiding effective risk analysis and informed investment choices. The report features detailed segmentation based on end users and geographic regions, giving in-depth insights into niche market segments. Additionally, it highlights key trends, growth drivers, challenges, and opportunities, supporting strategic decision-making with a balanced perspective analysis.

Through this report, readers get insightful views into the following parameters:

-□Analysis of key drivers (increasing need for early detection of public health threats, government funding for pandemic preparedness, and integration of wastewater data into national disease surveillance systems), restraints (high operational costs, lack of standardization in testing protocols, and limited infrastructure in low-resource regions), opportunities (expansion of surveillance beyond COVID-19 to antimicrobial resistance, pharmaceutical residues, and industrial pollutants; growing interest from private and municipal stakeholders), challenges (data interpretation complexity, lack of trained personnel, regulatory ambiguity, and difficulty in integrating surveillance findings into actionable public health responses), relating to the growth of the wastewater surveillance market.

-□Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the wastewater surveillance market.

-□Market Development: Comprehensive information about lucrative markets ? the report analyses the wastewater surveillance market across varied regions.

-□Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the wastewater surveillance market

-□Competitive Assessment: A comprehensive analysis of market share, product offerings, and leading strategies of major players, such as Thermo Fisher Scientific (US), Bio-Rad Laboratories (US), IDEXX Laboratories (US), Eurofins Scientific (Luxembourg), GT Molecular (US), Illumina (US), Oxford Nanopore (UK), Hach (Danaher) (US), Teledyne ISCO (US), LuminUltra (Canada), Biobot Analytics (US), Modern Water (DeepVerge) (UK), Promega (US), Aquamonitrix (Ireland), PathogenDx (US), Zymo Research (US), Kando (Israel), 4sight Analytics (US)

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