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Germicidal Lamp Market - Global Outlook and Forecast 2020-2025

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global Germicidal Lamp Market Report

The germicidal lamp market is expected to grow at a CAGR of over 36% during the period 2019–2025.

The global germicidal lamp market is experiencing a new lease of life after the outbreak of the COVID-19 pandemic with demand outpacing supply. The potential addressable market for germicidal lamps is growing as new end-users, which earlier did not utilize UV systems, have started to enquire about the same. With COVID-19 infections reaching over 10 million since the outbreak of the disease in December 2019, the spotlight on UV-C lamps has increased. UV-C based products are being explored as sanitizers. Although the residential sector is witnessing high traction, the lamp equipment utilization in new UV systems is growing. UV system manufacturers are designing systems, which are more portable than standalone. Hospital, hospitality, and transportation sectors are expected to fuel market growth in the medium term. While a large part of the historical demand was based on the availability of systems, disposable incomes of consumers, and commercial and industrial growth, the outbreak of COVID-19 has prioritized safety in both residential and non-residential sectors.

The following factors are likely to contribute to the growth of the germicidal lamp market during the forecast period:

Robotic UV Purification Systems

Growth from Several End-user Sectors Post Covid-19

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Investments in Water Treatment

Demand for Germicidal LED Lamp

The study considers the present scenario of the germicidal lamp market and its market dynamics for the period 2019?2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The study offers both the demand and supply aspect of the market. It profiles and examines leading companies and other prominent ones operating in the market.

GERMICIDAL LAMP MARKET SEGMENTATION

This research report includes a detailed segmentation by lamp, application, low pressure start type, and geography. The demand for germicidal mercury and LED lamps is growing due to the outbreak of the COVID-19. The new, as well as replacement demand, has been high since January 2020. Developing regions are also witnessing high traction on account of the severity of COVID-19. Since germicidal lamps are considered essential for COVID-19 control, favorable governmental support is likely to influence market growth positively. Germicidal mercury lamps have been experiencing high demand from the light commercial sector since January 2020 as the COVID-19 pandemic has affected the global market. The germicidal UV radiation has emerged as an effective UV sanitizer for both residential and light commercial sectors. The market was offset in the residential sector in April and May as the lockdown was enforced, putting a restriction on the trade of UV mercury lamps. The market for germicidal mercury lamp is expected to dominate its high market share, with the usage in residential and commercial sectors scheduled to the highest during the forecast period.

The water purification market is the largest in North America and Europe. The wastewater treatment by UV rays is slowly gaining market share in the industrial and commercial sectors. The conventional wastewater treatment is still in vogue, and hence the demand for UV disinfection of water is not high. The market for UV systems in water purification systems has not observed any drastic change in the aftermath of COVID-19. The market has been steadily growing, with the growing application of UV based systems. Several innovations also characterize the water treatment industry, and hence the competition is high for UV treatment systems.

The demand for air purifiers is the highest in the residential and commercial sectors.

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The demand for standalone industrial air purifier units is low as the industrial sector makes the use of HVAC systems with several types of filters and ultraviolet lamps. The germicidal lamp is a proven technology for the destruction of viruses, mold spores, and airborne bacteria. The urban demand for UV air purifier is high on account of high pollution levels and increased awareness of UV radiations.

Preheat germicidal ultraviolet lamps are in higher demand than cold cathodes. They are similar to fluorescent lamps in terms of functions. The demand for these lamps is increasing on account of their highly efficient sterilization functionality. Also, on account of low service life, the usage is limited in consumer (residential or light commercial) applications and is instead widely used in HVAC and other air purification applications.

Instant star or slimline UV systems, which are based on cold cathode technology, are less efficient than preheat lamps. However, they have higher service life which increases, their usage in air and surface disinfection systems. Instant start lamps are experiencing high application in light commercial end-user sectors on account of their cost-effectiveness. Also, medium pressure lamps widely utilize cold cathode germicidal lamps. Some of the major applications include walk-in refrigerators (for air sterilization or deodorization) and UV sanitizing chambers.

Segmentation by Lamp

Germicidal Mercury Lamp

Germicidal LED Lamp

Segmentation by Application

Water Purification

Air Purification

Surface Purification

Segmentation by Low-pressure Start Type

Preheat

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- Instant Start
- Programmed Start

INSIGHTS BY GEOGRAPHY

North America is expected to lead the global market during the forecast period as the adoption rate is likely to witness a quantum leap in the next five years. The UV germicidal market in North America is expected to grow at a CAGR of over 39% during the forecast period. The demand for germicidal lamps has grown across application categories after the eruption of the COVID-19. The demand, which was primarily restricted to water purification systems, has now observed growth in other sectors, especially the commercial sector in North America. Airports, hospitals, and hospitality sectors have emerged as significant revenue contributors in the aftermath of COVID-19. These segments are expected to provide a major impetus to the germicidal lamp market in North America.

Segmentation by Geography

- North America
  - US
  - Canada
- Europe
  - UK
  - Germany
  - France
  - Italy
  - Spain

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APAC

China

Japan

South Korea

Australia

India

Latin America

Brazil

Mexico

Argentina

Chile

Middle East & Africa

South Africa

Saudi Arabia

Egypt

UAE

Turkey

INSIGHTS BY VENDORS

The competitiveness in the market before COVID-19 was high as the growth prospects were growing at a steady pace owing to the increased investment in water and air-

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based purification systems by end-users. Post COVID-19, the competition has become more intense as the demand for UV-based and other COVID-19 control measures is in full swing across the world. Therefore, the industry has witnessed several new vendors entering the market, with existing vendors scaling up their operations. Growth opportunities for regional and local players also exist as they target low-priced residential products. Currently, the competitive intensity is higher in the APAC region on account of a largely untapped market and also the presence of a large number of vendors and suppliers.

Prominent Vendors

- Atlantic Ultraviolet
- Heraeus
- Calgon Carbon
- Halma
- Philips
- Trojan Technologies

Other Prominent Vendors

- Hydrotech
- Intco Medical
- Honle Group
- Lumalier Corporation
- Aquionics
- American Ultraviolet
- Ushio

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Glasco UV

Advanced UV

Hitech Ultraviolet

Ultraviol

Light Sources

Atlantium Technologies

Steril-Aire

Ultraaqua

Crystal IS

UVO3

Lit

Tepro

Bolb

Watersprint

Acuva

Klaran

Lyl UV Light

Germitec

UV - Technik

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Key Questions Answered

1. What is the growth forecast of the global ultraviolet germicidal lamp market size?
2. What are the factors impacting the global germicidal ultraviolet equipment market growth?
3. What are the drivers, trends, and restraints in the market?
4. Who are the key players, and what are their market shares?
5. What is the impact of the COVID-19 Pandemic on the UV LED market growth?

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