

# Medical Device Cleaning 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 Medical Device Cleaning Market Report

The medical device cleaning market by revenue is expected to grow at a CAGR of over 7% during the period 2019–2025.

The global medical device cleaning market is expected to observe an absolute growth of over 65% during the forecast period. The market is likely to witness growth on account of the prevalence of several chronic diseases and the increase in the re-use of medical equipment. The occurrence of acute diseases along with the growth in demand for surgical procedures is escalating the use of this equipment. Investments by governments in improving healthcare infrastructure, coupled with the growing healthcare expenditure, are contributing to the growth. The adoption of sterilization procedures for medical equipment within hospital settings has grown significantly with the presence of sterile processing departments in hospitals, which are dedicated to disinfection and sterilization procedures. Soaring need for effective and affordable sterilization techniques is poised to help medical cleaning devices gain traction during the forecast period.

The outbreak of the COVID-19 pandemic has activated the highest level of national response management protocols to contain the virus. As the virus is highly contagious, the reusing of several equipment such as respirators, infusion pumps, and catheters leads to the rapid spreading of the virus.

Therefore, to avoid the spread of the virus via these equipment, end-users are focusing on increasing the adoption of rapid medical device cleaners to prevent cross-

contamination, thereby boosting the medical device cleaning market growth.

The following factors are likely to contribute to the growth of the medical device cleaning market during the forecast period:

Covid-19 Pandemic Increasing Demand for Medical Device Cleaning in Healthcare Settings

Technological Advancements and Introduction of Advanced Materials & Cleaning Methods

High Growth Potential in Emerging Economies

Increasing Focus on Controlling HAIs in Healthcare Settings

The study considers the present scenario of the medical device cleaning market and its market dynamics for the period 2019-2025. It covers a detailed overview of several market growth enablers, restraints, and trends.

The report offers both the demand and supply aspect of the market. It profiles and examines leading companies and other prominent ones operating in the market.

### Medical Device Cleaning Market Segmentation

The global medical device cleaning market research report includes a detailed segmentation by device, process, end-user, and geography. In terms of revenue, the cleaning segment is a major contributor as this process helps to remove blood, secretion, microorganisms, and other contaminants. The high application of ultrasonic cleaners to clean fragile medical tools is boosting the growth. Although manual cleaning is the most frequently requested validation method, several hospital cleaning services and clinics use automated washer-disinfectors for reprocessing reusable equipment.

Disinfection is a necessary step performed for all medical equipment before and after use, hence, the usage of several cleaners is growing. The outbreak of the COVID-19 pandemic has increased the adoption of reusable equipment due to the scarcity and lack of production across the globe, resulting in the growing usage of medical device disinfection, and the trend is likely to drive the demand during the forecast period.

Healthcare-associated infections affect a high percentage of patients in developed economies. These infections have not only compromised patient safety in healthcare settings but have also increased healthcare expenditure. These infections account for approximately 37,000 and 99,000 deaths in Europe and the US, respectively. The increasing usage of several semi-critical devices has driven the demand for cleaning products to avoid cross-contamination. With the increase in hospital admissions and surgeries, semi-critical equipment are cleaned and sterilized after application to avoid the transmission of diseases and cross-contamination.

Hospitals are the major revenue contributors to the global medical device cleaning market. Hospitals use several critical and semi-critical tools along with catheters and surgical appliances to treat the patient population. There is high adoption of several equipment in emergency, ICU, and operation theaters, which is boosting the market. The segment is dominating as most patients prefer undergoing treatment in hospitals rather than other healthcare settings.

The clinics & physician end-user segment accounted for 23% in the global medical device cleaning market shares in 2019. The segment is expected to grow at a significant growth rate in the upcoming years. As these centers perform outpatient surgery and vaccinations, which increases the demand for medical devices, and subsequent sterilization, is boosting the demand for cleaning to reduce cross contaminations.

### Segmentation by Device

Semi-critical

Critical

Non-critical

### Segmentation by Process

Cleaning

Disinfection

Sterilization

## Segmentation by End-user

Hospitality

Clinics & Physician

Diagnostic Laboratories

Standalone Reprocessing Facilities

Others

## INSIGHTS BY GEOGRAPHY

North America represented the largest regional segment of the medical device cleaning market in 2019. The increasing healthcare expenditure in the US and Canada, the growing prevalence of HAIs, the growing geriatric population, well-established hospital industries, and the rising incidence of chronic diseases are factors contributing to the high shares. The market is expected to grow during the forecast period due to the rise in demand for sterilizers and disinfectants to stop the transmission of several diseases and microorganisms. Healthcare professionals and patients are looking to reduce the incidence of NSIs, bloodstream infection, and other complications associated with medical devices.

Currently, the pandemic situation of COVID-19 has increased the focus of healthcare professionals to provide quality care to patients. As this novel virus is highly transmitted, hence healthcare professionals are taking care of providing sterilized equipment during this pandemic to control its outbreak in the region. This is boosting the demand for automated sterilizers that sterilize tools in less time and provides quality care to the patients in the healthcare cleaning market.

## Segmentation by Geography

North America

US

Canada

Europe

UK

Germany

France

Spain

Italy

APAC

China

Japan

South Korea

Australia

India

Latin America

Brazil

Mexico

Argentina

Middle East & Africa

Saudi Arabia

Turkey

South Africa

## INSIGHTS BY VENDORS

STERIS, Getinge Group, Cantel, 3M, and Ecolab are the major medical device cleaning companies in the market. All these companies have a significant presence in major geographical regions such as North America, APAC, and Europe. However, there are many local vendors providing products with similar specifications at lower prices, which has resulted in a price war among vendors. The major vendors are continuously competing among themselves for the leading position, with occasional spurts of competition coming from other local vendors.

### Prominent Vendors

STERIS

Getinge Group

Cantel Medical

Ecolab

The 3M Company

### Other Prominent Vendors

Advanced Sterilization Products

G9 Chemicals

Stryker

Medline Industries

Sklar Surgical Instruments

Metrex Research

Ruhof

Biotrol

Oro Clean Chemie

Pharmax

MEDALKAN

Case Medical

Certol International

Dr. Weigert

### Key Questions Answered

1. What is the medical device cleaning market size and growth rate during the forecast period?
2. What are the factors impacting the growth of the medical device cleaning market shares?
3. Which device type/ end-user type/region is generating the largest revenue in the Asia Pacific region?
4. Who are the leading vendors in the medical device cleaning market, and what are their market shares?
5. What is the impact of the COVID-19 pandemic on the medical device cleaning market?

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