

# Global Hospital Filtration Market - 2025 -2032

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## Abstracts

Global hospital filtration Market reached US\$ 2.16 billion in 2024 and is expected to reach US\$ 5.32 billion by 2032, growing with a CAGR of 12.06% during the forecast period 2025-2032.

The global hospital filtration market was valued at USD 1.60 billion in 2021, grew to USD 1.76 billion in 2022, and further reached USD 1.95 billion in 2023, reflecting the increasing global focus on infection control and air quality in healthcare settings. Rising hospital infrastructure investments, stricter healthcare regulations, and the integration of high-efficiency filtration systems such as HEPA and ULPA filters support this expansion. Between 2025 and 2032, the market is anticipated to grow at a CAGR of 12.06%, highlighting its critical role in global healthcare preparedness and patient safety.

### Hospital Filtration Market Trend

In 2024, hospitals were recognized as major energy consumers, driving the adoption of filtration systems that reduce emissions and meet environmental targets. European health systems implemented self-cleaning and ozone-based air filtration technologies, reducing filter waste and improving air quality in surgical zones. Public hospitals increasingly adopted smart HVAC and filtration systems capable of automated air quality monitoring. Healthcare facilities in Asia expanded investments in pathogen-specific water filtration units to curb nosocomial infections. The shift toward modular, energy-efficient filtration designs reflects a global trend toward sustainable, scalable hospital infrastructure solutions.

### Market Dynamics

#### Rising Focus on Airborne Infection Control in Healthcare Facilities

The global health authorities emphasized airborne infection as a critical threat, with hospital-acquired infections affecting up to 15% of patients in low- and middle-income countries. The US CDC updated its guidelines recommending HEPA-level air filtration in all patient care areas, prompting widespread adoption. Germany and Japan allocated new federal funding for hospital HVAC retrofits targeting improved airborne pathogen containment. These regulatory and institutional measures are significantly boosting global demand for advanced hospital filtration systems.

### High Initial Implementation and Integration Costs

High initial implementation and integration costs continue to restrain adoption of hospital filtration systems globally. In 2024, US federal data estimated that full HVAC and filtration retrofits in medium-sized hospitals ranged more than US\$ 1 million, often excluding operational disruptions. Smaller healthcare facilities in Southeast Asia reported delays in upgrades due to lack of access to capital subsidies or government-backed financing programs.

### Segment Analysis

The global hospital filtration market is segmented based on product type, material type, technology, application and region.

### Point-of-Use Filters Segment Driving Hospital Filtration Market

The point-of-use (POU) filters segment is significantly driving growth in the global hospital filtration market by offering localized, high-efficiency filtration at patient touchpoints. In 2024, it emerged as the fastest-growing segment due to its cost-effectiveness and utility in areas like dialysis units, surgical suites, and faucet outlets. Clinical evaluations at cancer care centers showed these filters effectively prevented Legionella exposure for over 12 weeks while reducing bacterial load. Similar results were seen in Canadian hospitals, where 0.2 µm POU filters consistently eliminated harmful pathogens from faucets and showers, supporting infection control mandates in healthcare settings.

### Geographical Penetration

#### North America Drives the Global Hospital Filtration Market

North America, comprising the US, Canada, and Mexico, dominates the hospital

filtration market, accounting for approximately 28% of the global US\$ 2.16 billion market in 2024—about USD 605 million in regional demand. The US market alone reached more than US\$ 1 billion underscoring high investments in advanced air and water sterilization technologies, including HEPA and ULPA systems.

Government regulations and rigorous infection-control standards in hospitals continue to drive procurement of point-of-use filters and inline systems. In 2024, stringent guidelines for healthcare facility HVAC upgrades led to a 20% rise in retrofitting projects across the region, supported by federal tax incentives targeting sustainability and safety compliance.

### Sustainability Analysis

In 2024, hospitals were found to account for 9.8% of total US greenhouse gas emissions, highlighting the critical need for energy-efficient hospital infrastructure, including advanced filtration systems. Pilot HVAC retrofitting projects funded in California demonstrated over 20% reduction in natural gas usage in hospital environments. Tax incentives for energy upgrades helped hospitals achieve year-over-year energy and emissions reductions of around 27%, with further improvements expected through the Inflation Reduction Act.

In Europe, hospitals have adopted green procurement strategies aimed at cutting CO<sub>2</sub> emissions by 75% by 2030, prompting increased demand for sustainable air filtration technologies. Additional studies showed that simple HVAC control adjustments could reduce energy consumption in hospitals by up to 36%, reinforcing the role of intelligent filtration systems in meeting global healthcare sustainability goals.

### Competitive Landscape

The major global players in the market include Merck Life Science Private Limited, Danaher Corporation, Sartorius AG, Parker-Hannifin Corporation, 3M Company, Donaldson Company, Inc., Camfil Group, Atlas Copco AB, GE Healthcare, and Thermo Fisher Scientific, all of which offer specialized filtration solutions for medical and hospital environments.

### Key Developments

In April 2025, “Zentek” or the “Company”, an intellectual property technology development and commercialization company, announced collaboration

agreement effective April 11, 2025 with Filtration Solutions Industrial Co. (“FSCO”), a leading Saudi-based manufacturer and distributor of air filtration products, to manufacture and distribute ZenGUARD Enhanced Air Filters across the Gulf Cooperation Council (“GCC”) region.

In June 2024, Global life sciences leader Cytiva is addressed the distinct filtration needs of customers manufacturing high-concentration biologic drugs with its Supor Prime sterilizing grade filters, the latest addition to its extensive filtration portfolio. The Supor Prime filter is designed to help drug developers achieve higher yields, reduce premature blockages, and limit the costs associated with filtration losses.

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