

Sterilization Global Market – Forecast To 2028

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Abstracts

Sterilization is the process of complete eradication or elimination of all microbes both in their vegetative and sporing states from healthcare products using various physical and chemical methods. The highly distinct thermal, irradiation and chemical sterilization agents or technologies are used for the production of safer and value-enhanced sterile or aseptic healthcare products before their application.

As estimated by IQ4I analysis, the sterilization global market is expected to grow at a high single digit CAGR to reach \$9,398.9 million by 2028 due to necessity to curb the persistently escalating prevalence of Healthcare Associated Infections (HAIs), the requisite to sterilize the reusable high risk or critical surgical instruments used in the constantly elevating surgical procedures across the globe, the regulatory mandate of terminal sterilization or aseptic processing of healthcare products before commercialization, increasing trend of outsourcing of sterilization services by the healthcare industry, constant progressive refinements of various sterilization technologies, the gradual transition of medical devices market from reprocessed to the value enhanced single use devices and the necessity to terminally sterilize the huge volume of disposable devices, steadily increasing and advancing healthcare facilities, healthcare industry and research settings across the globe with increased utilization of various sterilization products and the persistently elevating fragile geriatric population burdened with several co-morbidities with increased medical needs and increased vulnerability to HAIs.

The sterilization global market is categorized into various market segments based on the product and services, end-users and geography.

The Sterilization global market based on products and services is segmented as Sterilization equipment, Sterilization consumables and contract sterilization services. Among these, Sterilization equipment segment commanded the largest revenue in 2021

and is projected to grow at mid single digit CAGR from 2021 to 2028. Contract Sterilization Services segment is the fastest emerging segment and is expected to grow at a double digit CAGR during the forecasted period. Based on product type, Sterilization Equipment market is further segmented into heat sterilization equipment, chemical sterilization equipment, and radiation sterilization equipment. Among these, Heat sterilizers segment accounted for the largest revenue in 2021 and is expected to grow at a mid single digit CAGR from 2021 to 2028. Chemical sterilizer segment is the fastest emerging segment and is expected to grow at a high single digit CAGR during the forecast period. Based on product type, Heat sterilizers are further categorized into Wet/Moist heat sterilization equipment and dry heat sterilization equipment. Among these, moist heat sterilization equipment segment is the largest and fastest emerging segment and is expected to grow at a mid single digit CAGR from 2021 to 2028. Based on sterilizer type, moist heat sterilizers market is further segmented into Vertical moist heat sterilizers, horizontal moist heat sterilizers and portable moist heat sterilizers. Among these, Vertical sterilizers segment occupied the largest share or revenue in 2021 and is expected to grow at a mid single digit CAGR from 2021 to 2028. Portable moist heat sterilizers segment is the fastest emerging segment and is expected of growing at a high single digit CAGR from 2021 to 2028. Based on product type, Chemical Sterilization equipment market is classified into ethylene oxide (EtO) sterilization equipment, Hydrogen Peroxide Gas plasma sterilization equipment, Vaporized Hydrogen Peroxide sterilization equipment, Formaldehyde sterilization equipment, Peracetic acid sterilization equipment and other chemical sterilization equipment consisting of nitrogen dioxide, ozone, chlorine dioxide, other plasma sterilizers and supercritical carbon dioxide sterilizers. Among these, Ethylene oxide sterilizers segment is the largest and fastest emerging segment and is expected to grow at high single digit CAGR from 2021 to 2028. Based on technology, radiation sterilization equipment market is categorized into Ionizing radiation sterilization equipment and non-ionizing radiation sterilization equipment. Among these, Ionizing radiation sterilizers segment is the largest and fastest emerging segment and is expected to grow at a mid single digit CAGR from 2021 to 2028. Ionizing radiation sterilization equipment global market is further segmented into gamma radiation sterilization equipment, Electron beam or E-beam sterilization equipment and X-ray sterilization equipment market. Among these, gamma radiation sterilization equipment segment accounted for largest revenue in 2021 and is expected to grow at a mid single digit CAGR during the forecast period. E-Beam Radiation sterilization equipment segment is the fastest emerging segment and is expected of growing at a high single digit CAGR from 2021 to 2028.

Based on product type, the sterilization consumables market has been classified into

sterility monitoring products, Sterile Pouches and Rolls, Sterilization wraps and other Sterilization consumables like rigid sterilization containers, instrument cassettes and sterilization or surgical towels. Among these, Sterility Monitoring products segment is the largest and fastest emerging segment and is expected of growing at a high single digit CAGR from 2021 to 2028. Based on the indicator type, the sterility monitoring products global market has been bifurcated into Chemical indicators and Biological indicators. Among these, chemical indicators segment accounted for the largest revenue in 2021 and is expected of growing at a high single digit CAGR from 2021 to 2028. Biological indicators segment is the fastest emerging segment and is expected of growing at a double digit CAGR during the forecasted period.

Based on the sterilization technique for which services are offered, the contract sterilization global market has been categorized into Ethylene oxide contract sterilization services, Gamma Radiation contract sterilization services, Electron-beam contract sterilization services and Other Contract sterilization services consisting of X-ray, heat or other chemical contract sterilization services. Among these, Ethylene oxide contract sterilization services segment occupied the largest share or revenue in 2021 and is expected to grow at a high single digit CAGR from 2021 to 2028. Gamma radiation sterilization services market is the fastest emerging market and is expected of growing at a double digit CAGR during the forecasted period.

The Sterilization market based on end-users is grouped into Pharma & Biotech industry, Medical device industry, Healthcare facilities and Other end-users consisting of academia and research institutes. Among these, the medical device industry segment is the largest segment in 2021 and is also the fastest emerging segment growing at a high single digit CAGR from 2021 to 2028.

The sterilization global market is mainly divided into four major geographies, namely, North America, Europe, Asia-Pacific and Rest of World (ROW). Among these, North America region commanded the largest revenue in 2021 and is expected of growing at a mid single digit CAGR during the forecast period. Asia-Pacific region is the fastest emerging region and is expected of growing at a double digit CAGR from 2021 to 2028.

The Sterilization global market is a consolidated market with few players occupying major share of the market. The top six players occupy a major share and other companies occupy only a minor share in the Sterilization global market in 2021. In the heat sterilizers' global market, top five players occupy majority of the market. In ethylene oxide sterilizers' global market, top four players occupy a major share while remaining minority share of the market is occupied by other companies. In hydrogen

peroxide sterilizers' global market, top four players occupy major share of the market.

Some of the key players of the sterilization market are 3M Company (U.S.), Fortive Corporation (ASP) (U.S.), Getinge AB (Sweden), MMM Group (Germany), Metall Zug (Belimed) (Switzerland), Matachana Group (Spain), Owens & Minor Inc. (U.S.), Sotera Health Company (U.S.), Shinva Medical Instrument Co.Ltd (China), Steris PLC (Ireland), TUTTNAUER Co Ltd. (Israel) and others.

The report provides an in depth market analysis of the above mentioned segments across the following regions:

North America

U.S.

Rest of North America

Europe

Germany

U.K.

France

Rest of Europe

Asia-Pacific

Japan

China

South Korea

Rest of APAC

Rest of the World (RoW)

Brazil

Rest of Latin America

Middle East & Others

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FIGURE 100 HORIZONTAL AND VERTICAL V/S BENCHTOP HEAT STERILIZERS

INSTALL BASE (2021) (NO.)

FIGURE 101 HORIZONTAL AND VERTICAL HEAT STERILIZERS INSTALL BASE, BASED ON REGION AND COUNTRY (2021) (NO.)

FIGURE 102 BENCHTOP HEAT STERILIZERS INSTALL BASE, BASED ON REGION AND COUNTRY (2021) (NO.)

FIGURE 103 HEAT STERILIZERS INSTALLED BASE, BASED ON TOP 15 COUNTRIES (2021) (NO.)

FIGURE 104 CHINA HEAT STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 105 U.S. HEAT STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 106 GERMANY HEAT STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 107 RUSSIA HEAT STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 108 U.K. HEAT STERILIZERS RUSSIA INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 109 JAPAN HEAT STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 110 FRANCE HEAT STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 111 SOUTH KOREA HEAT STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 112 THAILAND HEAT STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 113 ITALY HEAT STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 114 SPAIN HEAT STERILIZERS SWITZERLAND INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 115 TAIWAN HEAT STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 116 SWITZERLAND HEAT STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 117 MALAYSIA HEAT STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 118 AUSTRALIA HEAT STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 119 HYDROGEN PEROXIDE GLOBAL INSTALL BASE, BASED ON REGION AND COUNTRY (2021) (%)

FIGURE 120 HYDROGEN PEROXIDE STERILIZERS GLOBAL INSTALL BASE, BASED ON MAJOR PLAYERS (2021) (NO.)

FIGURE 121 HYDROGEN PEROXIDE STERILIZERS INSTALLED BASE, BASED ON TOP 15 COUNTRIES (2021) (NO.)

FIGURE 122 HORIZONTAL AND VERTICAL V/S BENCHTOP HYDROGEN PEROXIDE STERILIZERS INSTALL BASE (2021) (NO.)

FIGURE 123 HORIZONTAL AND VERTICAL HYDROGEN PEROXIDE STERILIZERS INSTALL BASE, BASED ON REGION AND COUNTRY (2021) (NO.)

FIGURE 124 BENCHTOP HYDROGEN PEROXIDE STERILIZERS INSTALL BASE, BASED ON REGION AND COUNTRY (2021) (NO.)

FIGURE 125 U.S. HYDROGEN PEROXIDE STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 126 CHINA HYDROGEN PEROXIDE INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 127 JAPAN HYDROGEN PEROXIDE STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 128 U.K. HYDROGEN PEROXIDE STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 129 GERMANY HYDROGEN PEROXIDE STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 130 FRANCE HYDROGEN PEROXIDE STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 131 SOUTH KOREA HYDROGEN PEROXIDE STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 132 RUSSIA HYDROGEN PEROXIDE STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 133 ITALY HYDROGEN PEROXIDE STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 134 THAILAND HYDROGEN PEROXIDE STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 135 INDIA HYDROGEN PEROXIDE STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 136 BRAZIL HYDROGEN PEROXIDE STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 137 CANADA HYDROGEN PEROXIDE STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 138 SPAIN HYDROGEN PEROXIDE STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 139 AUSTRALIA HYDROGEN PEROXIDE STERILIZERS INSTALL BASE,

BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 140 ETHYLENE OXIDE GLOBAL INSTALL BASE, BASED ON REGION AND COUNTRY (2021) (%)

FIGURE 141 ETHYLENE OXIDE STERILIZERS GLOBAL INSTALL BASE, BASED ON MAJOR PLAYERS (2021) (NO.)

FIGURE 142 ETHYLENE OXIDE STERILIZERS INSTALLED BASE, BASED ON TOP 15 COUNTRIES (2021) (NO.)

FIGURE 143 HORIZONTAL & VERTICAL V/S BENCHTOP ETHYLENE OXIDE STERILIZERS GLOBAL INSTALL BASE (2021) (NO.)

FIGURE 144 HORIZONTAL AND VERTICAL ETHYLENE OXIDE STERILIZERS INSTALL BASE, BASED ON REGION AND COUNTRY (2021) (NO.)

FIGURE 145 BENCHTOP ETHYLENE OXIDE STERILIZERS INSTALL BASE, BASED ON REGION AND COUNTRY (2021) (NO.)

FIGURE 146 CHINA ETHYLENE OXIDE STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 147 U.S. ETHYLENE OXIDE STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 148 U.K. ETHYLENE OXIDE STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 149 SOUTH KOREA ETHYLENE OXIDE STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 150 JAPAN ETHYLENE OXIDE STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 151 GERMANY ETHYLENE OXIDE STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 152 THAILAND ETHYLENE OXIDE STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 153 FRANCE ETHYLENE OXIDE STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 154 BRAZIL ETHYLENE OXIDE STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 155 MEXICO ETHYLENE OXIDE STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 156 ITALY ETHYLENE OXIDE STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 157 RUSSIA ETHYLENE OXIDE STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 158 INDIA ETHYLENE OXIDE STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 159 TAIWAN ETHYLENE OXIDE STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 160 ISRAEL ETHYLENE OXIDE STERILIZERS INSTALL BASE, BASED ON TOP PLAYERS (2021) (NO.)

FIGURE 161 KEY GROWTH STRATEGIES (2020 – 2022)

FIGURE 162 SWOT: 3M COMPANY

FIGURE 163 SWOT: FORTIVE CORPORATION

FIGURE 164 SWOT: GETINGE AB

FIGURE 165 SWOT: MATACHANA GROUP

FIGURE 166 SWOT: METALL ZUG (BELIMED)

FIGURE 167 SWOT: MMM GROUP

FIGURE 168 SWOT: OWENS AND MINOR INC.

FIGURE 169 SWOT: SHINVA MEDICAL INSTRUMENT CO. LTD

FIGURE 170 SWOT: SOTERA HEALTH COMPANY

FIGURE 171 SWOT: STERIS PLC

FIGURE 172 SWOT: TUTTNAUER

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