

Global Nitrogen Dioxide (NO₂) Gas Sterilization Market Growth (Status and Outlook) 2026-2032

<https://marketpublishers.com/r/GE14AEF099D1EN.html>

Date: May 2026

Pages: 72

Price: US\$ 3,660.00 (Single User License)

ID: GE14AEF099D1EN

Abstracts

The global Nitrogen Dioxide (NO₂) Gas Sterilization market size is predicted to grow from US\$ 667 million in 2025 to US\$ 1330 million in 2032; it is expected to grow at a CAGR of 10.6% from 2026 to 2032.

Nitrogen dioxide (NO₂) gas sterilization is a low-temperature terminal sterilization technology for medical devices and combination products, using NO₂ as the sterilizing agent in a controlled, sealed system to achieve effective microbial inactivation (including spores). Compared with ethylene oxide (EtO) and certain heat/radiation routes, its value proposition lies in enabling sterilization for products sensitive to temperature, material compatibility, and residual management—while strengthening a validation-ready, monitorable, and traceable quality framework. Typical implementations integrate gas supply/generation, concentration and environmental monitoring, sealed circulation control, and exhaust scrubbing/abatement, and must be developed, validated, and routinely controlled under general sterilization process requirements. The average gross profit margin of this product is 35%.

As medical devices trend toward more complex materials, finer structures, and more drug–device combinations, sterilization becomes a decisive constraint on manufacturability and regulatory readiness—not just a factory step. NO₂ gas sterilization benefits from two durable demand signals: products increasingly challenged by temperature and residual sensitivity under legacy routes, and rising expectations for validation, routine monitoring, and auditability across the sterilization lifecycle. Industry implementations have been built around NO₂ equipment and services, strengthening a narrative of “process window + product integrity,” particularly for combination products and selected surface-sterilization needs in prefilled formats.

Scaling is constrained by hard capabilities in safety governance, validation, and facility engineering. NO₂ is a hazardous gas requiring stringent occupational hygiene controls; successful adoption depends on robust leak monitoring, ventilation, and exhaust scrubbing/abatement, supported by auditable SOPs and emergency response readiness—where weaknesses can translate into compliance exposure and downtime risk. In parallel, compared with more established modalities, manufacturers often face heavier engineering and documentation work to demonstrate robustness across materials, packaging systems, and worst-case sterilization locations, and to align submissions and audits with general sterilization development/validation requirements.

Demand is shifting from “can it sterilize” to “sterilization strategy across the product lifecycle.” Combination products, prefilled formats, complex lumens, and novel materials place higher emphasis on protecting drug activity, material properties, and package integrity—raising interest in low-temperature, low-damage, well-controlled approaches. At the same time, supply chains increasingly integrate sterilization into tighter manufacturing cadence management, prompting re-balancing between outsourced, in-house, and hybrid models and raising expectations for batch traceability and audit readiness. In that context, NO₂ is increasingly positioned not merely as an alternative, but as a pathway to more predictable regulatory clearance and scaling for specific product families.

Upstream structure is best understood as a four-layer stack: gas supply/generation, monitoring and control, exhaust abatement, and facility compliance. Key inputs include NO₂ sourcing (supply or on-site generation), corrosion-resistant seals and tubing, concentration/leak sensors with control software, absorbents/neutralization media and abatement units, plus packaging compatibility validation and quality documentation. Because sterilization processes must be developed, validated, and routinely monitored under general requirements, differentiation goes beyond hardware and consumables into metrology and calibration, data integrity, change control, and compliant operations—making “engineering delivery capability” the core barrier.

LPI (LP Information)' newest research report, the “Nitrogen Dioxide (NO₂) Gas Sterilization Industry Forecast” looks at past sales and reviews total world Nitrogen Dioxide (NO₂) Gas Sterilization sales in 2025, providing a comprehensive analysis by region and market sector of projected Nitrogen Dioxide (NO₂) Gas Sterilization sales for 2026 through 2032. With Nitrogen Dioxide (NO₂) Gas Sterilization sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Nitrogen Dioxide (NO₂) Gas Sterilization industry.

This Insight Report provides a comprehensive analysis of the global Nitrogen Dioxide (NO₂) Gas Sterilization landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Nitrogen Dioxide (NO₂) Gas Sterilization portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Nitrogen Dioxide (NO₂) Gas Sterilization market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Nitrogen Dioxide (NO₂) Gas Sterilization and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Nitrogen Dioxide (NO₂) Gas Sterilization.

This report presents a comprehensive overview, market shares, and growth opportunities of Nitrogen Dioxide (NO₂) Gas Sterilization market by product type, application, key players and key regions and countries.

Segmentation by Type:

NO₂ Sterilization Chambers

Indicators & Monitoring Systems

Other

Segmentation by Sterilization Positioning:

Terminal Sterilization

Surface/External Sterilization

In-process Sterilization

Other

Segmentation by End-market Segment:

- Single-use Sterile Devices
- Reusable Device Reprocessing-related
- Other

Segmentation by Application:

- Hospitals & CSSD Units
- Medical Device Manufacturers
- Contract Sterilization Providers
- Other

This report also splits the market by region:

Americas

- United States

- Canada

- Mexico

- Brazil

APAC

- China

- Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

Noxilizer

STERIS

Getinge

Advanced Sterilization Products

Fedegari

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

- 2.1.1 Global Nitrogen Dioxide (NO₂) Gas Sterilization Market Size (2021-2032)
- 2.1.2 Nitrogen Dioxide (NO₂) Gas Sterilization Market Size CAGR by Region (2021 VS 2025 VS 2032)
- 2.1.3 World Current & Future Analysis for Nitrogen Dioxide (NO₂) Gas Sterilization by Country/Region (2021, 2025 & 2032)

2.2 Nitrogen Dioxide (NO₂) Gas Sterilization Segment by Type

- 2.2.1 NO₂ Sterilization Chambers
- 2.2.2 Indicators & Monitoring Systems
- 2.2.3 Other
- 2.2.4 Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Type
 - 2.2.4.1 Nitrogen Dioxide (NO₂) Gas Sterilization Market Size CAGR by Type (2021 VS 2025 VS 2032)
 - 2.2.4.2 Global Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share by Type (2021-2026)

2.3 Nitrogen Dioxide (NO₂) Gas Sterilization Segment by Sterilization Positioning

- 2.3.1 Terminal Sterilization
- 2.3.2 Surface/External Sterilization
- 2.3.3 In-process Sterilization
- 2.3.4 Other
- 2.3.5 Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Sterilization Positioning
 - 2.3.5.1 Nitrogen Dioxide (NO₂) Gas Sterilization Market Size CAGR by Sterilization Positioning (2021 VS 2025 VS 2032)
 - 2.3.5.2 Global Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share by

Sterilization Positioning (2021-2026)

2.4 Nitrogen Dioxide (NO₂) Gas Sterilization Segment by End-market Segment

2.4.1 Single-use Sterile Devices

2.4.2 Reusable Device Reprocessing-related

2.4.3 Other

2.4.4 Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by End-market Segment

2.4.4.1 Nitrogen Dioxide (NO₂) Gas Sterilization Market Size CAGR by End-market Segment (2021 VS 2025 VS 2032)

2.4.4.2 Global Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share by End-market Segment (2021-2026)

2.5 Nitrogen Dioxide (NO₂) Gas Sterilization Segment by Application

2.5.1 Hospitals & CSSD Units

2.5.2 Medical Device Manufacturers

2.5.3 Contract Sterilization Providers

2.5.4 Other

2.5.5 Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Application

2.5.5.1 Nitrogen Dioxide (NO₂) Gas Sterilization Market Size CAGR by Application (2021 VS 2025 VS 2032)

2.5.5.2 Global Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share by Application (2021-2026)

3 NITROGEN DIOXIDE (NO₂) GAS STERILIZATION MARKET SIZE BY PLAYER

3.1 Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share by Player

3.1.1 Global Nitrogen Dioxide (NO₂) Gas Sterilization Revenue by Player (2021-2026)

3.1.2 Global Nitrogen Dioxide (NO₂) Gas Sterilization Revenue Market Share by Player (2021-2026)

3.2 Global Nitrogen Dioxide (NO₂) Gas Sterilization Key Players Head office and Products Offered

3.3 Market Concentration Rate Analysis

3.3.1 Competition Landscape Analysis

3.3.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.4 New Products and Potential Entrants

3.5 Mergers & Acquisitions, Expansion

4 NITROGEN DIOXIDE (NO₂) GAS STERILIZATION BY REGION

4.1 Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Region (2021-2026)

4.2 Global Nitrogen Dioxide (NO₂) Gas Sterilization Annual Revenue by

Country/Region (2021-2026)

4.3 Americas Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Growth (2021-2026)

4.4 APAC Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Growth (2021-2026)

4.5 Europe Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Growth (2021-2026)

4.6 Middle East & Africa Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Growth (2021-2026)

5 AMERICAS

5.1 Americas Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Country (2021-2026)

5.2 Americas Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Type (2021-2026)

5.3 Americas Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Region (2021-2026)

6.2 APAC Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Type (2021-2026)

6.3 APAC Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

7 EUROPE

7.1 Europe Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Country (2021-2026)

7.2 Europe Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Type (2021-2026)

7.3 Europe Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Application

(2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Nitrogen Dioxide (NO₂) Gas Sterilization by Region

(2021-2026)

8.2 Middle East & Africa Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Type

(2021-2026)

8.3 Middle East & Africa Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 GLOBAL NITROGEN DIOXIDE (NO₂) GAS STERILIZATION MARKET FORECAST

10.1 Global Nitrogen Dioxide (NO₂) Gas Sterilization Forecast by Region (2027-2032)

10.1.1 Global Nitrogen Dioxide (NO₂) Gas Sterilization Forecast by Region (2027-2032)

10.1.2 Americas Nitrogen Dioxide (NO₂) Gas Sterilization Forecast

10.1.3 APAC Nitrogen Dioxide (NO₂) Gas Sterilization Forecast

10.1.4 Europe Nitrogen Dioxide (NO₂) Gas Sterilization Forecast

10.1.5 Middle East & Africa Nitrogen Dioxide (NO₂) Gas Sterilization Forecast

10.2 Americas Nitrogen Dioxide (NO₂) Gas Sterilization Forecast by Country (2027-2032)

- 10.2.1 United States Market Nitrogen Dioxide (NO₂) Gas Sterilization Forecast
- 10.2.2 Canada Market Nitrogen Dioxide (NO₂) Gas Sterilization Forecast
- 10.2.3 Mexico Market Nitrogen Dioxide (NO₂) Gas Sterilization Forecast
- 10.2.4 Brazil Market Nitrogen Dioxide (NO₂) Gas Sterilization Forecast
- 10.3 APAC Nitrogen Dioxide (NO₂) Gas Sterilization Forecast by Region (2027-2032)
 - 10.3.1 China Nitrogen Dioxide (NO₂) Gas Sterilization Market Forecast
 - 10.3.2 Japan Market Nitrogen Dioxide (NO₂) Gas Sterilization Forecast
 - 10.3.3 Korea Market Nitrogen Dioxide (NO₂) Gas Sterilization Forecast
 - 10.3.4 Southeast Asia Market Nitrogen Dioxide (NO₂) Gas Sterilization Forecast
 - 10.3.5 India Market Nitrogen Dioxide (NO₂) Gas Sterilization Forecast
 - 10.3.6 Australia Market Nitrogen Dioxide (NO₂) Gas Sterilization Forecast
- 10.4 Europe Nitrogen Dioxide (NO₂) Gas Sterilization Forecast by Country (2027-2032)
 - 10.4.1 Germany Market Nitrogen Dioxide (NO₂) Gas Sterilization Forecast
 - 10.4.2 France Market Nitrogen Dioxide (NO₂) Gas Sterilization Forecast
 - 10.4.3 UK Market Nitrogen Dioxide (NO₂) Gas Sterilization Forecast
 - 10.4.4 Italy Market Nitrogen Dioxide (NO₂) Gas Sterilization Forecast
 - 10.4.5 Russia Market Nitrogen Dioxide (NO₂) Gas Sterilization Forecast
- 10.5 Middle East & Africa Nitrogen Dioxide (NO₂) Gas Sterilization Forecast by Region (2027-2032)
 - 10.5.1 Egypt Market Nitrogen Dioxide (NO₂) Gas Sterilization Forecast
 - 10.5.2 South Africa Market Nitrogen Dioxide (NO₂) Gas Sterilization Forecast
 - 10.5.3 Israel Market Nitrogen Dioxide (NO₂) Gas Sterilization Forecast
 - 10.5.4 Turkey Market Nitrogen Dioxide (NO₂) Gas Sterilization Forecast
- 10.6 Global Nitrogen Dioxide (NO₂) Gas Sterilization Forecast by Type (2027-2032)
- 10.7 Global Nitrogen Dioxide (NO₂) Gas Sterilization Forecast by Application (2027-2032)
 - 10.7.1 GCC Countries Market Nitrogen Dioxide (NO₂) Gas Sterilization Forecast

11 KEY PLAYERS ANALYSIS

11.1 Noxilizer

- 11.1.1 Noxilizer Company Information
- 11.1.2 Noxilizer Nitrogen Dioxide (NO₂) Gas Sterilization Product Offered
- 11.1.3 Noxilizer Nitrogen Dioxide (NO₂) Gas Sterilization Revenue, Gross Margin and Market Share (2021-2026)
- 11.1.4 Noxilizer Main Business Overview
- 11.1.5 Noxilizer Latest Developments

11.2 STERIS

- 11.2.1 STERIS Company Information

- 11.2.2 STERIS Nitrogen Dioxide (NO₂) Gas Sterilization Product Offered
- 11.2.3 STERIS Nitrogen Dioxide (NO₂) Gas Sterilization Revenue, Gross Margin and Market Share (2021-2026)
- 11.2.4 STERIS Main Business Overview
- 11.2.5 STERIS Latest Developments
- 11.3 Getinge
 - 11.3.1 Getinge Company Information
 - 11.3.2 Getinge Nitrogen Dioxide (NO₂) Gas Sterilization Product Offered
 - 11.3.3 Getinge Nitrogen Dioxide (NO₂) Gas Sterilization Revenue, Gross Margin and Market Share (2021-2026)
 - 11.3.4 Getinge Main Business Overview
 - 11.3.5 Getinge Latest Developments
- 11.4 Advanced Sterilization Products
 - 11.4.1 Advanced Sterilization Products Company Information
 - 11.4.2 Advanced Sterilization Products Nitrogen Dioxide (NO₂) Gas Sterilization Product Offered
 - 11.4.3 Advanced Sterilization Products Nitrogen Dioxide (NO₂) Gas Sterilization Revenue, Gross Margin and Market Share (2021-2026)
 - 11.4.4 Advanced Sterilization Products Main Business Overview
 - 11.4.5 Advanced Sterilization Products Latest Developments
- 11.5 Fedegari
 - 11.5.1 Fedegari Company Information
 - 11.5.2 Fedegari Nitrogen Dioxide (NO₂) Gas Sterilization Product Offered
 - 11.5.3 Fedegari Nitrogen Dioxide (NO₂) Gas Sterilization Revenue, Gross Margin and Market Share (2021-2026)
 - 11.5.4 Fedegari Main Business Overview
 - 11.5.5 Fedegari Latest Developments

12 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

- Table 1. Nitrogen Dioxide (NO₂) Gas Sterilization Market Size CAGR by Region (2021 VS 2025 VS 2032) & (\$ millions)
- Table 2. Nitrogen Dioxide (NO₂) Gas Sterilization Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of NO₂ Sterilization Chambers
- Table 4. Major Players of Indicators & Monitoring Systems
- Table 5. Major Players of Other
- Table 6. Nitrogen Dioxide (NO₂) Gas Sterilization Market Size CAGR by Type (2021 VS 2025 VS 2032) & (\$ millions)
- Table 7. Global Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Type (2021-2026) & (\$ millions)
- Table 8. Global Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share by Type (2021-2026)
- Table 9. Major Players of Terminal Sterilization
- Table 10. Major Players of Surface/External Sterilization
- Table 11. Major Players of In-process Sterilization
- Table 12. Major Players of Other
- Table 13. Nitrogen Dioxide (NO₂) Gas Sterilization Market Size CAGR by Sterilization Positioning (2021 VS 2025 VS 2032) & (\$ millions)
- Table 14. Global Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Sterilization Positioning (2021-2026) & (\$ millions)
- Table 15. Global Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share by Sterilization Positioning (2021-2026)
- Table 16. Major Players of Single-use Sterile Devices
- Table 17. Major Players of Reusable Device Reprocessing-related
- Table 18. Major Players of Other
- Table 19. Nitrogen Dioxide (NO₂) Gas Sterilization Market Size CAGR by End-market Segment (2021 VS 2025 VS 2032) & (\$ millions)
- Table 20. Global Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by End-market Segment (2021-2026) & (\$ millions)
- Table 21. Global Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share by End-market Segment (2021-2026)
- Table 22. Nitrogen Dioxide (NO₂) Gas Sterilization Market Size CAGR by Application (2021 VS 2025 VS 2032) & (\$ millions)
- Table 23. Global Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Application

(2021-2026) & (\$ millions)

Table 24. Global Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share by Application (2021-2026)

Table 25. Global Nitrogen Dioxide (NO₂) Gas Sterilization Revenue by Player (2021-2026) & (\$ millions)

Table 26. Global Nitrogen Dioxide (NO₂) Gas Sterilization Revenue Market Share by Player (2021-2026)

Table 27. Nitrogen Dioxide (NO₂) Gas Sterilization Key Players Head office and Products Offered

Table 28. Nitrogen Dioxide (NO₂) Gas Sterilization Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 29. New Products and Potential Entrants

Table 30. Mergers & Acquisitions, Expansion

Table 31. Global Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Region (2021-2026) & (\$ millions)

Table 32. Global Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share by Region (2021-2026)

Table 33. Global Nitrogen Dioxide (NO₂) Gas Sterilization Revenue by Country/Region (2021-2026) & (\$ millions)

Table 34. Global Nitrogen Dioxide (NO₂) Gas Sterilization Revenue Market Share by Country/Region (2021-2026)

Table 35. Americas Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Country (2021-2026) & (\$ millions)

Table 36. Americas Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share by Country (2021-2026)

Table 37. Americas Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Type (2021-2026) & (\$ millions)

Table 38. Americas Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share by Type (2021-2026)

Table 39. Americas Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Application (2021-2026) & (\$ millions)

Table 40. Americas Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share by Application (2021-2026)

Table 41. APAC Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Region (2021-2026) & (\$ millions)

Table 42. APAC Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share by Region (2021-2026)

Table 43. APAC Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Type (2021-2026) & (\$ millions)

Table 44. APAC Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Application (2021-2026) & (\$ millions)

Table 45. Europe Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Country (2021-2026) & (\$ millions)

Table 46. Europe Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share by Country (2021-2026)

Table 47. Europe Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Type (2021-2026) & (\$ millions)

Table 48. Europe Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Application (2021-2026) & (\$ millions)

Table 49. Middle East & Africa Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Region (2021-2026) & (\$ millions)

Table 50. Middle East & Africa Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Type (2021-2026) & (\$ millions)

Table 51. Middle East & Africa Nitrogen Dioxide (NO₂) Gas Sterilization Market Size by Application (2021-2026) & (\$ millions)

Table 52. Key Market Drivers & Growth Opportunities of Nitrogen Dioxide (NO₂) Gas Sterilization

Table 53. Key Market Challenges & Risks of Nitrogen Dioxide (NO₂) Gas Sterilization

Table 54. Key Industry Trends of Nitrogen Dioxide (NO₂) Gas Sterilization

Table 55. Global Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Forecast by Region (2027-2032) & (\$ millions)

Table 56. Global Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share Forecast by Region (2027-2032)

Table 57. Global Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Forecast by Type (2027-2032) & (\$ millions)

Table 58. Global Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Forecast by Application (2027-2032) & (\$ millions)

Table 59. Noxilizer Details, Company Type, Nitrogen Dioxide (NO₂) Gas Sterilization Area Served and Its Competitors

Table 60. Noxilizer Nitrogen Dioxide (NO₂) Gas Sterilization Product Offered

Table 61. Noxilizer Nitrogen Dioxide (NO₂) Gas Sterilization Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 62. Noxilizer Main Business

Table 63. Noxilizer Latest Developments

Table 64. STERIS Details, Company Type, Nitrogen Dioxide (NO₂) Gas Sterilization Area Served and Its Competitors

Table 65. STERIS Nitrogen Dioxide (NO₂) Gas Sterilization Product Offered

Table 66. STERIS Nitrogen Dioxide (NO₂) Gas Sterilization Revenue (\$ million), Gross

Margin and Market Share (2021-2026)

Table 67. STERIS Main Business

Table 68. STERIS Latest Developments

Table 69. Getinge Details, Company Type, Nitrogen Dioxide (NO₂) Gas Sterilization Area Served and Its Competitors

Table 70. Getinge Nitrogen Dioxide (NO₂) Gas Sterilization Product Offered

Table 71. Getinge Nitrogen Dioxide (NO₂) Gas Sterilization Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 72. Getinge Main Business

Table 73. Getinge Latest Developments

Table 74. Advanced Sterilization Products Details, Company Type, Nitrogen Dioxide (NO₂) Gas Sterilization Area Served and Its Competitors

Table 75. Advanced Sterilization Products Nitrogen Dioxide (NO₂) Gas Sterilization Product Offered

Table 76. Advanced Sterilization Products Nitrogen Dioxide (NO₂) Gas Sterilization Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 77. Advanced Sterilization Products Main Business

Table 78. Advanced Sterilization Products Latest Developments

Table 79. Fedegari Details, Company Type, Nitrogen Dioxide (NO₂) Gas Sterilization Area Served and Its Competitors

Table 80. Fedegari Nitrogen Dioxide (NO₂) Gas Sterilization Product Offered

Table 81. Fedegari Nitrogen Dioxide (NO₂) Gas Sterilization Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 82. Fedegari Main Business

Table 83. Fedegari Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Nitrogen Dioxide (NO₂) Gas Sterilization Report Years Considered
- Figure 2. Research Objectives
- Figure 3. Research Methodology
- Figure 4. Research Process and Data Source
- Figure 5. Global Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Growth Rate (2021-2032) (\$ millions)
- Figure 6. Nitrogen Dioxide (NO₂) Gas Sterilization Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 7. Nitrogen Dioxide (NO₂) Gas Sterilization Sales Market Share by Country/Region (2025)
- Figure 8. Nitrogen Dioxide (NO₂) Gas Sterilization Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 9. Global Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share by Type in 2025
- Figure 10. Global Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share by Sterilization Positioning in 2025
- Figure 11. Global Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share by End-market Segment in 2025
- Figure 12. Nitrogen Dioxide (NO₂) Gas Sterilization in Hospitals & CSSD Units
- Figure 13. Global Nitrogen Dioxide (NO₂) Gas Sterilization Market: Hospitals & CSSD Units (2021-2026) & (\$ millions)
- Figure 14. Nitrogen Dioxide (NO₂) Gas Sterilization in Medical Device Manufacturers
- Figure 15. Global Nitrogen Dioxide (NO₂) Gas Sterilization Market: Medical Device Manufacturers (2021-2026) & (\$ millions)
- Figure 16. Nitrogen Dioxide (NO₂) Gas Sterilization in Contract Sterilization Providers
- Figure 17. Global Nitrogen Dioxide (NO₂) Gas Sterilization Market: Contract Sterilization Providers (2021-2026) & (\$ millions)
- Figure 18. Nitrogen Dioxide (NO₂) Gas Sterilization in Other
- Figure 19. Global Nitrogen Dioxide (NO₂) Gas Sterilization Market: Other (2021-2026) & (\$ millions)
- Figure 20. Global Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share by Application in 2025
- Figure 21. Global Nitrogen Dioxide (NO₂) Gas Sterilization Revenue Market Share by Player in 2025
- Figure 22. Global Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share

by Region (2021-2026)

Figure 23. Americas Nitrogen Dioxide (NO₂) Gas Sterilization Market Size 2021-2026 (\$ millions)

Figure 24. APAC Nitrogen Dioxide (NO₂) Gas Sterilization Market Size 2021-2026 (\$ millions)

Figure 25. Europe Nitrogen Dioxide (NO₂) Gas Sterilization Market Size 2021-2026 (\$ millions)

Figure 26. Middle East & Africa Nitrogen Dioxide (NO₂) Gas Sterilization Market Size 2021-2026 (\$ millions)

Figure 27. Americas Nitrogen Dioxide (NO₂) Gas Sterilization Value Market Share by Country in 2025

Figure 28. United States Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Growth 2021-2026 (\$ millions)

Figure 29. Canada Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Growth 2021-2026 (\$ millions)

Figure 30. Mexico Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Growth 2021-2026 (\$ millions)

Figure 31. Brazil Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Growth 2021-2026 (\$ millions)

Figure 32. APAC Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share by Region in 2025

Figure 33. APAC Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share by Type (2021-2026)

Figure 34. APAC Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share by Application (2021-2026)

Figure 35. China Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Growth 2021-2026 (\$ millions)

Figure 36. Japan Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Growth 2021-2026 (\$ millions)

Figure 37. South Korea Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Growth 2021-2026 (\$ millions)

Figure 38. Southeast Asia Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Growth 2021-2026 (\$ millions)

Figure 39. India Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Growth 2021-2026 (\$ millions)

Figure 40. Australia Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Growth 2021-2026 (\$ millions)

Figure 41. Europe Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share by Country in 2025

Figure 42. Europe Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share by Type (2021-2026)

Figure 43. Europe Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share by Application (2021-2026)

Figure 44. Germany Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Growth 2021-2026 (\$ millions)

Figure 45. France Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Growth 2021-2026 (\$ millions)

Figure 46. UK Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Growth 2021-2026 (\$ millions)

Figure 47. Italy Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Growth 2021-2026 (\$ millions)

Figure 48. Russia Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Growth 2021-2026 (\$ millions)

Figure 49. Middle East & Africa Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share by Region (2021-2026)

Figure 50. Middle East & Africa Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share by Type (2021-2026)

Figure 51. Middle East & Africa Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share by Application (2021-2026)

Figure 52. Egypt Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Growth 2021-2026 (\$ millions)

Figure 53. South Africa Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Growth 2021-2026 (\$ millions)

Figure 54. Israel Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Growth 2021-2026 (\$ millions)

Figure 55. Turkey Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Growth 2021-2026 (\$ millions)

Figure 56. GCC Countries Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Growth 2021-2026 (\$ millions)

Figure 57. Americas Nitrogen Dioxide (NO₂) Gas Sterilization Market Size 2027-2032 (\$ millions)

Figure 58. APAC Nitrogen Dioxide (NO₂) Gas Sterilization Market Size 2027-2032 (\$ millions)

Figure 59. Europe Nitrogen Dioxide (NO₂) Gas Sterilization Market Size 2027-2032 (\$ millions)

Figure 60. Middle East & Africa Nitrogen Dioxide (NO₂) Gas Sterilization Market Size 2027-2032 (\$ millions)

Figure 61. United States Nitrogen Dioxide (NO₂) Gas Sterilization Market Size

2027-2032 (\$ millions)

Figure 62. Canada Nitrogen Dioxide (NO₂) Gas Sterilization Market Size 2027-2032 (\$ millions)

Figure 63. Mexico Nitrogen Dioxide (NO₂) Gas Sterilization Market Size 2027-2032 (\$ millions)

Figure 64. Brazil Nitrogen Dioxide (NO₂) Gas Sterilization Market Size 2027-2032 (\$ millions)

Figure 65. China Nitrogen Dioxide (NO₂) Gas Sterilization Market Size 2027-2032 (\$ millions)

Figure 66. Japan Nitrogen Dioxide (NO₂) Gas Sterilization Market Size 2027-2032 (\$ millions)

Figure 67. Korea Nitrogen Dioxide (NO₂) Gas Sterilization Market Size 2027-2032 (\$ millions)

Figure 68. Southeast Asia Nitrogen Dioxide (NO₂) Gas Sterilization Market Size 2027-2032 (\$ millions)

Figure 69. India Nitrogen Dioxide (NO₂) Gas Sterilization Market Size 2027-2032 (\$ millions)

Figure 70. Australia Nitrogen Dioxide (NO₂) Gas Sterilization Market Size 2027-2032 (\$ millions)

Figure 71. Germany Nitrogen Dioxide (NO₂) Gas Sterilization Market Size 2027-2032 (\$ millions)

Figure 72. France Nitrogen Dioxide (NO₂) Gas Sterilization Market Size 2027-2032 (\$ millions)

Figure 73. UK Nitrogen Dioxide (NO₂) Gas Sterilization Market Size 2027-2032 (\$ millions)

Figure 74. Italy Nitrogen Dioxide (NO₂) Gas Sterilization Market Size 2027-2032 (\$ millions)

Figure 75. Russia Nitrogen Dioxide (NO₂) Gas Sterilization Market Size 2027-2032 (\$ millions)

Figure 76. Egypt Nitrogen Dioxide (NO₂) Gas Sterilization Market Size 2027-2032 (\$ millions)

Figure 77. South Africa Nitrogen Dioxide (NO₂) Gas Sterilization Market Size 2027-2032 (\$ millions)

Figure 78. Israel Nitrogen Dioxide (NO₂) Gas Sterilization Market Size 2027-2032 (\$ millions)

Figure 79. Turkey Nitrogen Dioxide (NO₂) Gas Sterilization Market Size 2027-2032 (\$ millions)

Figure 80. Global Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share Forecast by Type (2027-2032)

Figure 81. Global Nitrogen Dioxide (NO₂) Gas Sterilization Market Size Market Share Forecast by Application (2027-2032)

Figure 82. GCC Countries Nitrogen Dioxide (NO₂) Gas Sterilization Market Size 2027-2032 (\$ millions)

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