

Biodefense Market by Technology (GHz-band Wave, Microwave Heating, RF-EMR, Cold Plasma, Gamma, UV), Product (Decontamination (Sterilization Devices, Disinfection Units), Biosensors, AI Surveillance), Application, Region - Global Forecast to 2030

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Abstracts

The biodefense market is estimated at USD 0.89 billion in 2025 and is projected to reach USD 1.81 billion by 2030 at a CAGR of 15.1% during the forecast period.

Technological advancements and changing market conditions are the key drivers of the biodefense market.

'Based on product, sterilization devices under decontamination is estimated to hold the largest market share in 2025.'

Based on product, decontamination is categorized into disinfection units and sterilization devices. Sterilization devices are expected to account for the largest market share in 2025 due to their indispensable function in eliminating a broad biological agent in healthcare, defense, and laboratory environments. The growing need for low-temperature sterilizers, hydrogen peroxide vapor systems, microwave sterilizer units, and gamma irradiation solutions has increased the need for organizations to find stable, validated procedures for decontaminating medical equipment, laboratory surfaces, and delicate equipment. These instruments provide high performance, regulatory approval, and compatibility with intricate and heat-sensitive materials, which are critical to biosafety regulations in hospitals, research facilities, and mobile bio-containment units.

'Biosensor-based technologies segment is estimated to hold the largest market share in 2025 by technology.'

Based on technology, biosensor-based technologies are estimated to account for the largest market in the biodefense market by 2025 due to their pivotal function in providing real-time, precise, and decentralized sensing of biological threats. Biosensor-based technologies are being widely used in hospitals, defense forces, border control, and public health organizations for their high sensitivity and quick response to detecting pathogens like anthrax, ricin, and new viruses. The emergence of point-of-care diagnostics and increasing demand for early warning systems in biodefense applications have considerably enhanced the usage of biosensor technologies. Their versatility in varied environments, ranging from military field operations to urban hospitals and mobile laboratories, makes them valuable to the biodefense market.

'Europe is estimated to hold the second-largest market share in 2025.'

Europe is estimated to have the second-largest share of the biodefense market due to growing government efforts to enhance biosecurity and pandemic preparedness. The region has witnessed increased investment in biosurveillance infrastructure and decontamination technologies. Countries such as Germany, France, and the UK are at the forefront with strong public health systems and country-level biodefense strategies.

Besides that, robust partnerships among defense agencies, biotech firms, and research organizations have boosted innovation in technologies like mobile biocontainment units, biosensors, and AI-based threat detection. Support from EU-wide initiatives such as Horizon Europe and cooperation with the European Centre for Disease Prevention and Control (ECDC) further boost regional readiness.

The break-up of the profile of primary participants in the biodefense market:

By Company Type: Tier 1 – 35%, Tier 2 – 54%, and Tier 3 – 20%

By Designation: Directors– 55%, Managers – 27%, Others – 18%

By Region: North America – 40%, Europe – 20%, Asia Pacific – 30%, Rest of the World – 10%

STERIS (US), ASP International GmbH (US), Ushio Inc. (Japan), Sotera Health Company (US), and Bioquell, An Ecolab Solution (UK) are the key market players that offer connectivity applicable to various sectors and have well-equipped and strong distribution networks across North America, Europe, Asia Pacific, and the Rest of the

World.

Research Coverage:

The study covers the biodefense market across various segments and subsegments. It aims to estimate the size and growth potential of this market across different segments based on product, application, technology, and region. This study also includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to their solutions and business offerings, recent developments undertaken by them, and key market strategies adopted by them.

This report segments the biodefense market across five key regions: North America, Europe, Asia Pacific, and the Rest of the World and their respective key countries. The report's scope includes in-depth information on significant factors, such as drivers, restraints, challenges, and opportunities that influence the growth of the biodefense market.

A comprehensive analysis of major industry players has been conducted to provide insights into their business profiles, solutions, and services. This analysis also covers key aspects like agreements, collaborations, product launches, contracts, expansions, acquisitions, and partnerships associated with the biodefense market.

Reasons to buy this report:

This report serves as a valuable resource for market leaders and newcomers in the biodefense market, offering data that closely approximates revenue figures for both the overall market and its subsegments. It equips stakeholders with a comprehensive understanding of the competitive landscape, facilitating informed decisions to enhance their market positioning and formulating effective go-to-market strategies. The report imparts valuable insights into the market dynamics, offering information on crucial factors such as drivers, restraints, challenges, and opportunities, enabling stakeholders to gauge the market's pulse.

The report provides insights into the following pointers:

Analysis of Key Drivers: Rising threat of bioterrorism, high government funding, strategic national stockpiling, and increasing technological advancements

Market Penetration: Comprehensive information on biodefense solutions offered

by the top players in the market

Product Development/Innovation: Detailed insights into upcoming technologies, research & development activities, and product & service launches in the biodefense market

Market Development: Comprehensive information about lucrative markets; the report analyses the biodefense market across varied regions

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the biodefense market

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players in the biodefense market

Contents

1 INTRODUCTION

- 1.1 STUDY OBJECTIVES
- 1.2 MARKET DEFINITION
- 1.3 MARKET SCOPE
 - 1.3.1 BIODEFENSE MARKET SEGMENTATION
 - 1.3.2 YEARS CONSIDERED
- 1.4 CURRENCY AND PRICING
- 1.5 INCLUSIONS AND EXCLUSIONS
- 1.6 STAKEHOLDERS

2 RESEARCH METHODOLOGY

- 2.1 RESEARCH DATA
 - 2.1.1 SECONDARY DATA
 - 2.1.1.1 Key data from secondary sources
 - 2.1.2 PRIMARY DATA
 - 2.1.2.1 Key primary sources
 - 2.1.2.2 Key data from primary sources
 - 2.1.2.3 Breakdown of primary interviews
- 2.2 FACTOR ANALYSIS
 - 2.2.1 INTRODUCTION
 - 2.2.2 DEMAND-SIDE INDICATORS
 - 2.2.3 SUPPLY-SIDE INDICATORS
- 2.3 MARKET SIZE ESTIMATION
 - 2.3.1 BOTTOM-UP APPROACH
 - 2.3.1.1 Company revenue estimation approach
 - 2.3.1.2 Growth rate projections
 - 2.3.2 TOP-DOWN APPROACH
 - 2.3.2.1 Market assessment by region and country
- 2.4 DATA TRIANGULATION
- 2.5 RESEARCH ASSUMPTIONS
- 2.6 RISK ANALYSIS
- 2.7 RESEARCH LIMITATIONS
 - 2.7.1 METHODOLOGY-RELATED LIMITATIONS
 - 2.7.2 SCOPE-RELATED LIMITATIONS

3 EXECUTIVE SUMMARY 35 4 PREMIUM INSIGHTS

- 4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN BIODEFENSE MARKET
- 4.2 BIODEFENSE MARKET, BY PRODUCT
- 4.3 BIODEFENSE MARKET, BY TECHNOLOGY
- 4.4 BIODEFENSE MARKET, BY APPLICATION
- 4.5 BIODEFENSE MARKET, BY COUNTRY

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

5.2.1 DRIVERS

- 5.2.1.1 Rising threat of bioterrorism
- 5.2.1.2 Increase in government funding and strategic national stockpiling
- 5.2.1.3 Technological advancements and innovations
- 5.2.1.4 Growing geopolitical tensions and biological warfare risks

5.2.2 RESTRAINTS

- 5.2.2.1 High R&D costs and long approval times
- 5.2.2.2 Lack of global standardization in biodefense protocols

5.2.3 OPPORTUNITIES

- 5.2.3.1 Emergence of AI-powered biosurveillance & predictive analytics
- 5.2.3.2 Emergence of nanotechnology-based biosensors

5.2.4 CHALLENGES

- 5.2.4.1 Infrastructure shortages in low-resource areas
- 5.2.4.2 Cybersecurity risks in connected biodefense systems

5.3 TRENDS AND DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES

5.4 VALUE CHAIN ANALYSIS

- 5.4.1 RESEARCH & DEVELOPMENT (~10-20%)
- 5.4.2 RAW MATERIAL PRODUCERS (~20-40%)
- 5.4.3 PRODUCT MANUFACTURING (~40-60%)
- 5.4.4 TESTING & QUALITY ASSURANCE (~60-80%)
- 5.4.5 END USERS (~80-100%)

5.5 ECOSYSTEM ANALYSIS

- 5.5.1 PROMINENT COMPANIES
- 5.5.2 PRIVATE AND SMALL ENTERPRISES
- 5.5.3 END USERS

5.6 TARIFF AND REGULATORY LANDSCAPE

5.7 TRADE DATA

- 5.7.1 IMPORT SCENARIO
- 5.7.2 EXPORT SCENARIO 54
- 5.8 KEY STAKEHOLDERS AND BUYING CRITERIA
 - 5.8.1 KEY STAKEHOLDERS IN BUYING PROCESS
 - 5.8.2 BUYING CRITERIA
- 5.9 USE CASE ANALYSIS
 - 5.9.1 USE CASE 1: REAL-TIME PATHOGEN DETECTION AT TORONTO PEARSON INTERNATIONAL AIRPORT
 - 5.9.2 USE CASE 2: US–UK STRATEGIC DIALOGUE ON BIOLOGICAL SECURITY
 - 5.9.3 USE CASE 3: ENHANCED REMOTE DETECTION OF AEROSOL AND VAPOR THREATS WITH MX908 BEACON
- 5.10 KEY CONFERENCES AND EVENTS, 2025–2026
- 5.11 PRICING ANALYSIS
 - 5.11.1 AVERAGE SELLING PRICE OF BIODEFENSE PRODUCTS, BY REGION
 - 5.11.2 FACTORS IMPACTING COST IN BIODEFENSE MARKET
 - 5.11.3 INDICATIVE PRICING ANALYSIS OF BIODEFENSE TECHNOLOGIES, BY KEY PLAYERS, 2025
- 5.12 INVESTMENT AND FUNDING SCENARIO
- 5.13 IMPACT OF AI/ GENERATIVE AI ON BIODEFENSE MARKET
 - 5.13.1 PREDICTIVE BIOSURVEILLANCE
 - 5.13.2 NEXT-GENERATION BIOSENSORS
 - 5.13.3 RAPID PATHOGEN IDENTIFICATION
 - 5.13.4 IMAGE & SIGNAL ANALYSIS
 - 5.13.5 SYNTHETIC DATA GENERATION
- 5.14 MACROECONOMIC OUTLOOK
 - 5.14.1 INTRODUCTION
 - 5.14.2 NORTH AMERICA
 - 5.14.3 EUROPE
 - 5.14.4 ASIA PACIFIC
 - 5.14.5 MIDDLE EAST
 - 5.14.6 LATIN AMERICA
 - 5.14.7 AFRICA
- 5.15 BUSINESS MODELS
 - 5.15.1 BUSINESS MODELS IN BIODEFENSE MARKET
- 5.16 TECHNOLOGY ROADMAP

6 INDUSTRY TRENDS

- 6.1 INTRODUCTION
- 6.2 TECHNOLOGY TRENDS

- 6.2.1 NANOTECHNOLOGY-ENABLED BIOSENSORS
- 6.2.2 DIGITAL HEALTH TOOLS & MOBILE BIOSURVEILLANCE
- 6.2.3 REMOTE SENSING FOR DETECTION AND IDENTIFICATION OF BIOLOGICAL THREATS
- 6.2.4 DIGITAL TWINS & SIMULATION TECHNOLOGY
- 6.3 IMPACT OF MEGATRENDS
- 6.3.1 ARTIFICIAL INTELLIGENCE AND MACHINE LEARNING FOR BIOTHREAT DETECTION
- 6.3.2 BLOCKCHAIN FOR SUPPLY CHAIN AND DATA INTEGRITY
- 6.4 TECHNOLOGY ANALYSIS
- 6.4.1 KEY TECHNOLOGIES
 - 6.4.1.1 Real-time aerosol detectors
 - 6.4.1.2 Mass spectrometry
- 6.4.2 COMPLEMENTARY TECHNOLOGIES
 - 6.4.2.1 Decision support systems
 - 6.4.2.2 Geospatial information systems
- 6.4.3 ADJACENT TECHNOLOGIES
 - 6.4.3.1 High-throughput screening
 - 6.4.3.2 Digital identity and biometric authentication
- 6.5 PATENT ANALYSIS

7 BIODEFENSE MARKET, BY PRODUCT

- 7.1 INTRODUCTION
- 7.2 DETECTION & SURVEILLANCE
 - 7.2.1 INCREASING THREAT OF EMERGING INFECTIOUS DISEASES AND BIOTERRORISM TO DRIVE SEGMENTAL GROWTH
 - 7.2.2 BIOSENSOR SYSTEMS
 - 7.2.3 AI-BASED PLATFORMS
- 7.3 DECONTAMINATION SYSTEMS
 - 7.3.1 RISING GOVERNMENT AND DEFENSE SECTOR INVESTMENTS IN BIOSECURITY INFRASTRUCTURE TO DRIVE SEGMENTAL GROWTH
 - 7.3.2 DISINFECTION UNITS
 - 7.3.3 STERILIZATION DEVICES
- 7.4 OTHERS
 - 7.4.1 PURIFICATION UNITS
 - 7.4.2 CONTAINMENT & ISOLATION DEVICES

8 BIODEFENSE MARKET, BY TECHNOLOGY

8.1 INTRODUCTION

8.2 GHZ-BAND WAVE EMISSION FOR AIRBORNE VIRAL INACTIVATION

8.2.1 CHEMICAL-FREE AND RAPID DECONTAMINATION FEATURE TO DRIVE GROWTH

8.3 UV-BASED TECHNOLOGIES

8.3.1 GROWING NEED TO REDUCE SPREAD OF AIRBORNE OR SURFACE-DEPOSITED PATHOGENS IN HIGH-RISK AREAS TO DRIVE GROWTH

8.4 MICROWAVE HEATING

8.4.1 ABILITY TO QUICKLY DISINFECT CONFINED SPACES OR CRITICAL SURFACES EXPOSED TO AIRBORNE BIOTERROR AGENTS TO DRIVE GROWTH

95 8.5 RADIOFREQUENCY (RF-EMR) HEATING

8.5.1 STERILIZATION AND DISINFECTION APPLICATIONS TO DRIVE GROWTH

8.6 COLD PLASMA-BASED PATHOGEN INACTIVATION

8.6.1 BROAD-SPECTRUM PATHOGEN INACTIVATION TO DRIVE GROWTH

8.7 GAMMA RADIATION

8.7.1 LONG-RANGE AND HIGH-VOLUME APPLICATION TO DRIVE GROWTH

8.8 BIOSENSOR TECHNOLOGIES

8.8.1 IMMEDIATE THREAT IDENTIFICATION WITHOUT FULL LABORATORY SUPPORT TO DRIVE GROWTH

8.8.1.1 Electrochemical biosensors

8.8.1.2 Optical biosensors

8.8.1.3 Piezoelectric biosensors

8.8.1.4 Thermal biosensors

8.8.1.5 Nanomechanical biosensors

8.9 AI TECHNOLOGIES

8.9.1 ABILITY TO PREDICT OUTBREAKS AND IDENTIFY EMERGING THREATS IN REAL TIME TO DRIVE GROWTH

8.9.1.1 Machine learning for outbreak prediction

8.9.1.2 AI integration with surveillance networks

8.10 OTHERS

9 BIODEFENSE MARKET, BY APPLICATION

9.1 INTRODUCTION

9.2 MILITARY

9.2.1 THREAT OF BIOLOGICAL WARFARE TO DRIVE DEMAND

9.3 HOMELAND SECURITY

9.3.1 INCREASING NEED FOR DETECTION AND EARLY WARNING BIODEFENSE

SYSTEMS TO DRIVE DEMAND

9.4 PUBLIC INFRASTRUCTURE

9.4.1 HIGH NEED FOR SAFEGUARDING CITIZENS AND ENSURING RESILIENCE
IN FACE OF BIOLOGICAL RISKS TO DRIVE DEMAND

9.5 HOSPITALS & MEDICAL INSTITUTES

9.5.1 GROWING NEED FOR HEALTHCARE SYSTEM RESILIENCE TO DRIVE
DEMAND

9.6 OTHERS

10 BIODEFENSE MARKET, BY REGION

10.1 INTRODUCTION

10.2 NORTH AMERICA

10.2.1 PESTLE ANALYSIS

10.2.2 US

10.2.2.1 Rise in global geopolitical tensions due to concerns about bioterrorism and
state-sponsored biological programs to drive market 113 10.2.3 CANADA

10.2.3.1 Government's focus on enhancing public health infrastructure to drive
market

10.3 ASIA PACIFIC

10.3.1 PESTLE ANALYSIS

10.3.2 INDIA

10.3.2.1 Growing national security concerns considering strained relations with
neighboring countries to drive market

10.3.3 AUSTRALIA

10.3.3.1 Increasing government initiatives and investments to drive market

10.3.4 CHINA

10.3.4.1 Focus on strengthening biosecurity and strategic biotechnology development
to drive market

10.3.5 JAPAN

10.3.5.1 Heightened awareness of biological threats to drive market

10.3.6 REST OF ASIA PACIFIC

10.4 EUROPE

10.4.1 PESTLE ANALYSIS

10.4.2 GERMANY

10.4.2.1 Comprehensive biosecurity programs and institutional collaboration to drive
market

10.4.3 UK

10.4.3.1 Growing focus on biosurveillance to drive market

10.4.4 FRANCE

10.4.4.1 Increasing government investment in bioproduction infrastructure and public health preparedness to drive market

10.4.5 ITALY

10.4.5.1 Increasing focus on building biodefense infrastructure to drive market

10.4.6 REST OF EUROPE

10.5 REST OF THE WORLD (ROW)

10.5.1 PESTLE ANALYSIS

10.5.2 MIDDLE EAST & AFRICA

10.5.2.1 Increasing need for preparedness for emerging biological threats to drive market

10.5.3 LATIN AMERICA

10.5.3.1 International collaborations to strengthen national biodefense efforts to drive market

143 11 COMPETITIVE LANDSCAPE

11.1 INTRODUCTION

11.2 KEY PLAYER STRATEGIES/RIGHT TO WIN, 2020–2025

11.3 BIODEFENSE MARKET REVENUE ANALYSIS, 2020–2025

11.4 BIODEFENSE MARKET SHARE ANALYSIS, 2024

11.5 BIODEFENSE MARKET COMPANY EVALUATION MATRIX: KEY PLAYERS, 2024

11.5.1 STARS

11.5.2 EMERGING LEADERS

11.5.3 PERVASIVE PLAYERS

11.5.4 PARTICIPANTS

11.5.5 COMPANY FOOTPRINT: KEY PLAYERS, 2024

11.5.5.1 Company footprint

11.5.5.2 Product footprint

11.5.5.3 Technology footprint

11.5.5.4 Application footprint

11.5.5.5 Region footprint

11.6 BIODEFENSE MARKET COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2024

11.6.1 PROGRESSIVE COMPANIES

11.6.2 RESPONSIVE COMPANIES

11.6.3 DYNAMIC COMPANIES

11.6.4 STARTING BLOCKS

11.6.5 COMPETITIVE BENCHMARKING

11.6.5.1 List of startups/SMEs

11.6.5.2 Competitive benchmarking of startups/SMEs

11.7 BRAND/PRODUCT COMPARISON

11.8 COMPANY VALUATION AND FINANCIAL METRICS

11.9 COMPETITIVE SCENARIO

11.9.1 DEALS

11.9.2 OTHER DEVELOPMENTS

12 COMPANY PROFILES

12.1 KEY PLAYERS

12.1.1 STERIS

12.1.1.1 Business overview

12.1.1.2 Products offered

12.1.1.3 Recent developments

12.1.1.3.1 Deals

12.1.1.4 MnM view

12.1.1.4.1 Key strengths

12.1.1.4.2 Strategic choices

12.1.1.4.3 Weaknesses and competitive threats 166

12.1.2 ASP INTERNATIONAL GMBH

12.1.2.1 Business overview

12.1.2.2 Products offered

12.1.2.3 MnM view

12.1.2.3.1 Key strengths

12.1.2.3.2 Strategic choices

12.1.2.3.3 Weaknesses and competitive threats

12.1.3 USHIO INC.

12.1.3.1 Business overview

12.1.3.2 Products offered

12.1.3.3 Recent developments

12.1.3.3.1 Deals

12.1.3.4 MnM view

12.1.3.4.1 Key strengths

12.1.3.4.2 Strategic choices

12.1.3.4.3 Weaknesses and competitive threats

12.1.4 SOTERA HEALTH COMPANY

12.1.4.1 Business overview

12.1.4.2 Products offered

12.1.4.3 MnM view

12.1.4.3.1 Key strengths

- 12.1.4.3.2 Strategic choices
- 12.1.4.3.3 Weaknesses and competitive threats
- 12.1.5 BIOQUELL, AN ECOLAB SOLUTION
 - 12.1.5.1 Business overview
 - 12.1.5.2 Products offered
 - 12.1.5.3 MnM view
 - 12.1.5.3.1 Key strengths
 - 12.1.5.3.2 Strategic choices
 - 12.1.5.3.3 Weaknesses and competitive threats
- 12.1.6 THERMO FISHER SCIENTIFIC INC.
 - 12.1.6.1 Business overview
 - 12.1.6.2 Products offered
 - 12.1.6.3 Recent developments
 - 12.1.6.3.1 Deals
- 12.1.7 SMITHS DETECTION GROUP LTD
 - 12.1.7.1 Business overview
 - 12.1.7.2 Products offered
 - 12.1.7.3 Recent developments
 - 12.1.7.3.1 Deals 183
- 12.1.8 E4LIFE SRL.
 - 12.1.8.1 Business overview
 - 12.1.8.2 Products offered
- 12.1.9 SYNEXIS
 - 12.1.9.1 Business overview
 - 12.1.9.2 Products offered
 - 12.1.9.3 Recent developments
 - 12.1.9.3.1 Deals
- 12.1.10 BLUEDOT INC.
 - 12.1.10.1 Business overview
 - 12.1.10.2 Products offered
 - 12.1.10.3 Recent developments
 - 12.1.10.3.1 Deals
- 12.1.11 XENEX DISINFECTION SERVICES INC.
 - 12.1.11.1 Business overview
 - 12.1.11.2 Products offered
 - 12.1.11.3 Recent developments
 - 12.1.11.3.1 Other developments
- 12.1.12 SKAN AG
 - 12.1.12.1 Business overview
 - 12.1.12.2 Products offered

- 12.1.12.3 Recent developments
 - 12.1.12.3.1 Deals
- 12.1.13 MICROSOFT
 - 12.1.13.1 Business overview
 - 12.1.13.2 Products offered
- 12.1.14 BIO-RAD LABORATORIES, INC.
 - 12.1.14.1 Business overview
 - 12.1.14.2 Products offered
- 12.1.15 AIRBOSS DEFENSE GROUP, INC.
 - 12.1.15.1 Business overview
 - 12.1.15.2 Products offered
 - 12.1.15.3 Recent developments
 - 12.1.15.3.1 Deals
- 12.2 OTHER PLAYERS
 - 12.2.1 IONISOS
 - 12.2.2 AQUISENSE
 - 12.2.3 GERMFREE
 - 12.2.4 PATHOGENFOCUS
 - 12.2.5 UV LIGHT TECHNOLOGY LTD – PART OF DARO GROUP 202
 - 12.2.6 BERTIN TECHNOLOGIES
 - 12.2.7 FAR UV TECHNOLOGIES, INC.
 - 12.2.8 PURE AQUA, INC.
 - 12.2.9 PALANTIR TECHNOLOGIES INC.
 - 12.2.10 P?SCHNER MICROWAVE POWER SYSTEMS

13 APPENDIX

- 13.1 DISCUSSION GUIDE
- 13.2 KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL
- 13.3 CUSTOMIZATION OPTIONS
- 13.4 RELATED REPORTS
- 13.5 COMPANY LONG LIST
- 13.6 AUTHOR DETAILS

List Of Tables

LIST OF TABLES

TABLE 1 USD EXCHANGE RATES, 2019–2024

TABLE 2 BIODEFENSE MARKET: INCLUSIONS AND EXCLUSIONS

TABLE 3 IMPACT OF TECHNOLOGICAL ADVANCEMENTS ON BIODEFENSE MARKET: COMPARISON OF TRADITIONAL VS. MODERN APPROACHES

TABLE 4 ROLE OF COMPANIES IN ECOSYSTEM

TABLE 5 NORTH AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 6 EUROPE: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 7 ASIA PACIFIC: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 8 REST OF THE WORLD: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 9 IMPORT DATA FOR HS CODE 901890, BY COUNTRY, 2020–2024 (USD THOUSAND)

TABLE 10 EXPORT DATA FOR HS CODE 901890, BY COUNTRY, 2020–2024 (USD THOUSAND)

TABLE 11 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS, BY TOP 3 APPLICATIONS (%)

TABLE 12 KEY BUYING CRITERIA, BY TOP 3 APPLICATIONS

TABLE 13 KEY CONFERENCES AND EVENTS, 2025–2026

TABLE 14 AVERAGE SELLING PRICE OF BIODEFENSE PRODUCTS, BY REGION, 2024 (USD)

TABLE 15 INDICATIVE PRICING OF BIODEFENSE TECHNOLOGIES, BY KEY PLAYERS, 2025

TABLE 16 COMPARISON BETWEEN DIFFERENT BUSINESS MODELS

TABLE 17 LIST OF MAJOR PATENTS FOR BIODEFENSE, 2023–2025

TABLE 18 BIODEFENSE MARKET, BY PRODUCT, 2021–2024 (USD MILLION)

TABLE 19 BIODEFENSE MARKET, BY PRODUCT, 2025–2030 (USD MILLION)

TABLE 20 BIODEFENSE MARKET FOR DETECTION & SURVEILLANCE PRODUCT TYPES, 2021–2024 (USD MILLION)

TABLE 21 BIODEFENSE MARKET FOR DETECTION & SURVEILLANCE PRODUCT TYPES, 2025–2030 (USD MILLION)

TABLE 22 DETECTION & SURVEILLANCE: BIODEFENSE MARKET, BY BIOSENSOR PRODUCT TYPE, 2021–2024 (USD MILLION)

TABLE 23 DETECTION & SURVEILLANCE: BIODEFENSE MARKET, BY
BIOSENSOR PRODUCT TYPE, 2025–2030 (USD MILLION)

TABLE 24 SMITH DETECTION GROUP LTD: BIOFLASH BIOLOGICAL IDENTIFIER:
SPECIFICATIONS

TABLE 25 DETECTION & SURVEILLANCE: BIODEFENSE MARKET, BY AI-BASED
PLATFORM TYPE, 2021–2024 (USD MILLION)

TABLE 26 DETECTION & SURVEILLANCE: BIODEFENSE MARKET, BY AI-BASED
PLATFORM TYPE, 2025–2030 (USD MILLION)

TABLE 27 KRAKEN SENSE PRODUCT: KRAKEN™ PATHOGEN RISK DETECTION
SYSTEM: SPECIFICATIONS

TABLE 28 BIODEFENSE MARKET, BY DECONTAMINATION SYSTEM TYPE,
2021–2024 (USD MILLION)

TABLE 29 BIODEFENSE MARKET, BY DECONTAMINATION SYSTEM TYPE,
2025–2030 (USD MILLION)

TABLE 30 BIODEFENSE DISINFECTION UNITS MARKET, BY TECHNOLOGY,
2021–2024 (USD MILLION)

TABLE 31 BIODEFENSE DISINFECTION UNITS MARKET, BY TECHNOLOGY,
2025–2030 (USD MILLION)

TABLE 32 DRDO PRODUCT: UV BLASTER–AREA UV DISINFECTION SYSTEM:
SPECIFICATIONS

TABLE 33 BIODEFENSE STERILIZATION DEVICES MARKET, BY TECHNOLOGY,
2021–2024 (USD MILLION)

TABLE 34 BIODEFENSE STERILIZATION DEVICES MARKET, BY TECHNOLOGY,
2025–2030 (USD MILLION)

TABLE 35 STERIS PLC PRODUCT: STERIS VHP M100 BIODECONTAMINATION
UNIT: SPECIFICATIONS

TABLE 36 BIODEFENSE MARKET, BY OTHER PRODUCTS, 2021–2024 (USD
MILLION)

TABLE 37 BIODEFENSE MARKET, BY OTHER PRODUCTS, 2025–2030 (USD
MILLION)

TABLE 38 BIODEFENSE PURIFICATION UNITS MARKET, BY TECHNOLOGY,
2021–2024 (USD MILLION)

TABLE 39 BIODEFENSE PURIFICATION UNITS MARKET, BY TECHNOLOGY,
2025–2030 (USD MILLION)

TABLE 40 CASTELLEX PRODUCT: AIR 40 BIO FILTRATION UNIT WITH UV LIGHT:
SPECIFICATIONS

TABLE 41 BIODEFENSE CONTAINMENT & ISOLATION DEVICES MARKET, BY
TECHNOLOGY, 2021–2024 (USD MILLION)

TABLE 42 BIODEFENSE CONTAINMENT & ISOLATION DEVICES MARKET, BY

TECHNOLOGY, 2025–2030 (USD MILLION)

TABLE 43 EPIGUARD PRODUCT: EPISHUTTLE–MEDICAL ISOLATION AND
TRANSPORT UNIT: SPECIFICATIONS

TABLE 44 BIODEFENSE MARKET, BY TECHNOLOGY, 2021–2024 (USD MILLION)

TABLE 45 BIODEFENSE MARKET, BY TECHNOLOGY, 2025–2030 (USD MILLION)

TABLE 46 BIODEFENSE MARKET, BY APPLICATION, 2021–2024 (USD MILLION)

TABLE 47 BIODEFENSE MARKET, BY APPLICATION, 2025–2030 (USD MILLION)

TABLE 48 BIODEFENSE MARKET, BY REGION, 2021–2024 (USD MILLION)

TABLE 49 BIODEFENSE MARKET, BY REGION, 2025–2030 (USD MILLION)

TABLE 50 NORTH AMERICA: BIODEFENSE MARKET, BY COUNTRY, 2021–2024
(USD MILLION)

TABLE 51 NORTH AMERICA: BIODEFENSE MARKET, BY COUNTRY, 2025–2030
(USD MILLION)

TABLE 52 NORTH AMERICA: BIODEFENSE MARKET, BY PRODUCT, 2021–2024
(USD MILLION)

TABLE 53 NORTH AMERICA: BIODEFENSE MARKET, BY PRODUCT, 2025–2030
(USD MILLION)

TABLE 54 NORTH AMERICA: BIODEFENSE MARKET, BY TECHNOLOGY,
2021–2024 (USD MILLION)

TABLE 55 NORTH AMERICA: BIODEFENSE MARKET, BY TECHNOLOGY,
2025–2030 (USD MILLION)

TABLE 56 NORTH AMERICA: BIODEFENSE MARKET, BY APPLICATION, 2021–2024
(USD MILLION)

TABLE 57 NORTH AMERICA: BIODEFENSE MARKET, BY APPLICATION, 2025–2030
(USD MILLION)

TABLE 58 US: BIODEFENSE MARKET, BY PRODUCT, 2021–2024 (USD MILLION)

TABLE 59 US: BIODEFENSE MARKET, BY PRODUCT, 2025–2030 (USD MILLION)

TABLE 60 US: BIODEFENSE MARKET, BY APPLICATION, 2021–2024 (USD
MILLION)

TABLE 61 US: BIODEFENSE MARKET, BY APPLICATION, 2025–2030 (USD
MILLION)

TABLE 62 CANADA: BIODEFENSE MARKET, BY PRODUCT, 2021–2024 (USD
MILLION)

TABLE 63 CANADA: BIODEFENSE MARKET, BY PRODUCT, 2025–2030 (USD
MILLION)

TABLE 64 CANADA: BIODEFENSE MARKET, BY APPLICATION, 2021–2024 (USD
MILLION)

TABLE 65 CANADA: BIODEFENSE MARKET, BY APPLICATION, 2025–2030 (USD
MILLION)

TABLE 66 ASIA PACIFIC: BIODEFENSE MARKET, BY COUNTRY, 2021–2024 (USD MILLION)

TABLE 67 ASIA PACIFIC: BIODEFENSE MARKET, BY COUNTRY, 2025–2030 (USD MILLION)

TABLE 68 ASIA PACIFIC: BIODEFENSE MARKET, BY PRODUCT, 2021–2024 (USD MILLION)

TABLE 69 ASIA PACIFIC: BIODEFENSE MARKET, BY PRODUCT, 2025–2030 (USD MILLION)

TABLE 70 ASIA PACIFIC: BIODEFENSE MARKET, BY TECHNOLOGY, 2021–2024 (USD MILLION)

TABLE 71 ASIA PACIFIC: BIODEFENSE MARKET, BY TECHNOLOGY, 2025–2030 (USD MILLION)

TABLE 72 ASIA PACIFIC: BIODEFENSE MARKET, BY APPLICATION, 2021–2024 (USD MILLION)

TABLE 73 ASIA PACIFIC: BIODEFENSE MARKET, BY APPLICATION, 2025–2030 (USD MILLION)

TABLE 74 INDIA: BIODEFENSE MARKET, BY PRODUCT, 2021–2024 (USD MILLION)

TABLE 75 INDIA: BIODEFENSE MARKET, BY PRODUCT, 2025–2030 (USD MILLION)

TABLE 76 INDIA: BIODEFENSE MARKET, BY APPLICATION, 2021–2024 (USD MILLION)

TABLE 77 INDIA: BIODEFENSE MARKET, BY APPLICATION, 2025–2030 (USD MILLION)

TABLE 78 AUSTRALIA: BIODEFENSE MARKET, BY PRODUCT, 2021–2024 (USD MILLION)

TABLE 79 AUSTRALIA: BIODEFENSE MARKET, BY PRODUCT, 2025–2030 (USD MILLION)

TABLE 80 AUSTRALIA: BIODEFENSE MARKET, BY APPLICATION, 2021–2024 (USD MILLION)

TABLE 81 AUSTRALIA: BIODEFENSE MARKET, BY APPLICATION, 2025–2030 (USD MILLION)

TABLE 82 CHINA: BIODEFENSE MARKET, BY PRODUCT, 2021–2024 (USD MILLION)

TABLE 83 CHINA: BIODEFENSE MARKET, BY PRODUCT, 2025–2030 (USD MILLION)

TABLE 84 CHINA: BIODEFENSE MARKET, BY APPLICATION, 2021–2024 (USD MILLION)

TABLE 85 CHINA: BIODEFENSE MARKET, BY APPLICATION, 2025–2030 (USD MILLION)

TABLE 86 JAPAN: BIODEFENSE MARKET, BY PRODUCT, 2021–2024 (USD

MILLION)

TABLE 87 JAPAN: BIODEFENSE MARKET, BY PRODUCT, 2025–2030 (USD MILLION)

TABLE 88 JAPAN: BIODEFENSE MARKET, BY APPLICATION, 2021–2024 (USD MILLION)

TABLE 89 JAPAN: BIODEFENSE MARKET, BY APPLICATION, 2025–2030 (USD MILLION)

TABLE 90 REST OF ASIA PACIFIC: BIODEFENSE MARKET, BY PRODUCT, 2021–2024 (USD MILLION)

TABLE 91 REST OF ASIA PACIFIC: BIODEFENSE MARKET, BY PRODUCT, 2025–2030 (USD MILLION)

TABLE 92 REST OF ASIA PACIFIC: BIODEFENSE MARKET, BY APPLICATION, 2021–2024 (USD MILLION)

TABLE 93 REST OF ASIA PACIFIC: BIODEFENSE MARKET, BY APPLICATION, 2025–2030 (USD MILLION)

TABLE 94 EUROPE: BIODEFENSE MARKET, BY COUNTRY, 2021–2024 (USD MILLION)

TABLE 95 EUROPE: BIODEFENSE MARKET, BY COUNTRY, 2025–2030 (USD MILLION)

TABLE 96 EUROPE: BIODEFENSE MARKET, BY PRODUCT, 2021–2024 (USD MILLION)

TABLE 97 EUROPE: BIODEFENSE MARKET, BY PRODUCT, 2025–2030 (USD MILLION)

TABLE 98 EUROPE: BIODEFENSE MARKET, BY TECHNOLOGY, 2021–2024 (USD MILLION)

TABLE 99 EUROPE: BIODEFENSE MARKET, BY TECHNOLOGY, 2025–2030 (USD MILLION)

TABLE 100 EUROPE: BIODEFENSE MARKET, BY APPLICATION, 2021–2024 (USD MILLION)

TABLE 101 EUROPE: BIODEFENSE MARKET, BY APPLICATION, 2025–2030 (USD MILLION)

TABLE 102 GERMANY: BIODEFENSE MARKET, BY PRODUCT, 2021–2024 (USD MILLION)

TABLE 103 GERMANY: BIODEFENSE MARKET, BY PRODUCT, 2025–2030 (USD MILLION)

TABLE 104 GERMANY: BIODEFENSE MARKET, BY APPLICATION, 2021–2024 (USD MILLION)

TABLE 105 GERMANY: BIODEFENSE MARKET, BY APPLICATION, 2025–2030 (USD MILLION)

TABLE 106 UK: BIODEFENSE MARKET, BY PRODUCT, 2021–2024 (USD MILLION)

TABLE 107 UK: BIODEFENSE MARKET, BY PRODUCT, 2025–2030 (USD MILLION)

TABLE 108 UK: BIODEFENSE MARKET, BY APPLICATION, 2021–2024 (USD MILLION)

TABLE 109 UK: BIODEFENSE MARKET, BY APPLICATION, 2025–2030 (USD MILLION)

TABLE 110 FRANCE: BIODEFENSE MARKET, BY PRODUCT, 2021–2024 (USD MILLION)

TABLE 111 FRANCE: BIODEFENSE MARKET, BY PRODUCT, 2025–2030 (USD MILLION)

TABLE 112 FRANCE: BIODEFENSE MARKET, BY APPLICATION, 2021–2024 (USD MILLION)

TABLE 113 FRANCE: BIODEFENSE MARKET, BY APPLICATION, 2025–2030 (USD MILLION)

TABLE 114 ITALY: BIODEFENSE MARKET, BY PRODUCT, 2021–2024 (USD MILLION)

TABLE 115 ITALY: BIODEFENSE MARKET, BY PRODUCT, 2025–2030 (USD MILLION)

TABLE 116 ITALY: BIODEFENSE MARKET, BY APPLICATION, 2021–2024 (USD MILLION)

TABLE 117 ITALY: BIODEFENSE MARKET, BY APPLICATION, 2025–2030 (USD MILLION)

TABLE 118 REST OF EUROPE: BIODEFENSE MARKET, BY PRODUCT, 2021–2024 (USD MILLION)

TABLE 119 REST OF EUROPE: BIODEFENSE MARKET, BY PRODUCT, 2025–2030 (USD MILLION)

TABLE 120 REST OF EUROPE: BIODEFENSE MARKET, BY APPLICATION, 2021–2024 (USD MILLION)

TABLE 121 REST OF EUROPE: BIODEFENSE MARKET, BY APPLICATION, 2025–2030 (USD MILLION)

TABLE 122 REST OF THE WORLD: BIODEFENSE MARKET, BY REGION, 2021–2024 (USD MILLION)

TABLE 123 REST OF THE WORLD: BIODEFENSE MARKET, BY REGION, 2025–2030 (USD MILLION)

TABLE 124 REST OF THE WORLD: BIODEFENSE MARKET, BY PRODUCT, 2021–2024 (USD MILLION)

TABLE 125 REST OF THE WORLD: BIODEFENSE MARKET, BY PRODUCT, 2025–2030 (USD MILLION)

TABLE 126 REST OF THE WORLD: BIODEFENSE MARKET, BY TECHNOLOGY,

2021–2024 (USD MILLION)

TABLE 127 REST OF THE WORLD: BIODEFENSE MARKET, BY TECHNOLOGY,
2025–2030 (USD MILLION)

TABLE 128 REST OF THE WORLD: BIODEFENSE MARKET, BY APPLICATION,
2021–2024 (USD MILLION)

TABLE 129 REST OF THE WORLD: BIODEFENSE MARKET, BY APPLICATION,
2025–2030 (USD MILLION)

TABLE 130 MIDDLE EAST & AFRICA: BIODEFENSE MARKET, BY PRODUCT,
2021–2024 (USD MILLION)

TABLE 131 MIDDLE EAST & AFRICA: BIODEFENSE MARKET, BY PRODUCT,
2025–2030 (USD MILLION)

TABLE 132 MIDDLE EAST & AFRICA: BIODEFENSE MARKET, BY APPLICATION,
2021–2024 (USD MILLION)

TABLE 133 MIDDLE EAST & AFRICA: BIODEFENSE MARKET, BY APPLICATION,
2025–2030 (USD MILLION)

TABLE 134 LATIN AMERICA: BIODEFENSE MARKET, BY PRODUCT, 2021–2024
(USD MILLION)

TABLE 135 LATIN AMERICA: BIODEFENSE MARKET, BY PRODUCT, 2025–2030
(USD MILLION)

TABLE 136 LATIN AMERICA: BIODEFENSE MARKET, BY APPLICATION, 2021–2024
(USD MILLION)

TABLE 137 LATIN AMERICA: BIODEFENSE MARKET, BY APPLICATION, 2025–2030
(USD MILLION)

TABLE 138 KEY PLAYER STRATEGIES/RIGHT TO WIN, 2020–2025

TABLE 139 BIODEFENSE MARKET: DEGREE OF COMPETITION

TABLE 140 BIODEFENSE MARKET: PRODUCT FOOTPRINT

TABLE 141 BIODEFENSE MARKET: TECHNOLOGY FOOTPRINT

TABLE 142 BIODEFENSE MARKET: APPLICATION FOOTPRINT

TABLE 143 BIODEFENSE MARKET: REGION FOOTPRINT

TABLE 144 BIODEFENSE MARKET: LIST OF STARTUPS/SMES

TABLE 145 BIODEFENSE MARKET: COMPETITIVE BENCHMARKING OF
STARTUPS/SMES

TABLE 146 BIODEFENSE MARKET: DEALS, 2020–2025

TABLE 147 BIODEFENSE MARKET: OTHER DEVELOPMENTS, 2020–2025

TABLE 148 STERIS: COMPANY OVERVIEW

TABLE 149 STERIS: PRODUCTS OFFERED

TABLE 150 STERIS: DEALS

TABLE 151 ASP INTERNATIONAL GMBH: COMPANY OVERVIEW

TABLE 152 ASP INTERNATIONAL GMBH: PRODUCTS OFFERED

TABLE 153	USHIO INC.: COMPANY OVERVIEW
TABLE 154	USHIO INC.: PRODUCTS OFFERED
TABLE 155	USHIO INC.: DEALS
TABLE 156	SOTERA HEALTH COMPANY: COMPANY OVERVIEW
TABLE 157	SOTERA HEALTH COMPANY: PRODUCTS OFFERED
TABLE 158	BIOQUELL, AN ECOLAB SOLUTION: COMPANY OVERVIEW
TABLE 159	BIOQUELL, AN ECOLAB SOLUTION: PRODUCTS OFFERED
TABLE 160	THERMO FISHER SCIENTIFIC INC.: COMPANY OVERVIEW
TABLE 161	THERMO FISHER SCIENTIFIC INC.: PRODUCTS OFFERED
TABLE 162	THERMO FISHER SCIENTIFIC INC.: DEALS
TABLE 163	SMITHS DETECTION GROUP LTD: COMPANY OVERVIEW
TABLE 164	SMITHS DETECTION GROUP LTD: PRODUCTS OFFERED
TABLE 165	SMITHS DETECTION GROUP LTD: DEALS
TABLE 166	E4LIFE SRL.: COMPANY OVERVIEW
TABLE 167	E4LIFE SRL.: PRODUCTS OFFERED
TABLE 168	SYNEXIS: COMPANY OVERVIEW
TABLE 169	SYNEXIS: PRODUCTS OFFERED
TABLE 170	SYNEXIS: DEALS
TABLE 171	BLUEDOT INC.: COMPANY OVERVIEW
TABLE 172	BLUEDOT INC.: PRODUCTS OFFERED
TABLE 173	BLUEDOT INC.: DEALS
TABLE 174	XENEX DISINFECTION SERVICES INC.: COMPANY OVERVIEW
TABLE 175	XENEX DISINFECTION SERVICES INC.: PRODUCTS OFFERED
TABLE 176	XENEX DISINFECTION SERVICES INC.: OTHER DEVELOPMENTS
TABLE 177	SKAN AG: COMPANY OVERVIEW
TABLE 178	SKAN AG: PRODUCTS OFFERED
TABLE 179	SKAN AG : DEALS
TABLE 180	MICROSOFT: COMPANY OVERVIEW
TABLE 181	MICROSOFT: PRODUCTS OFFERED
TABLE 182	BIO-RAD LABORATORIES, INC.: COMPANY OVERVIEW
TABLE 183	BIO-RAD LABORATORIES, INC.: PRODUCTS OFFERED
TABLE 184	AIRBOSS DEFENSE GROUP, INC.: COMPANY OVERVIEW
TABLE 185	AIRBOSS DEFENSE GROUP, INC.: PRODUCTS OFFERED
TABLE 186	AIRBOSS DEFENSE GROUP, INC.: DEALS
TABLE 187	IONISOS: COMPANY OVERVIEW
TABLE 188	AQUISENSE: COMPANY OVERVIEW
TABLE 189	GERMFREE: COMPANY OVERVIEW
TABLE 190	PATHOGENFOCUS: COMPANY OVERVIEW
TABLE 191	UV LIGHT TECHNOLOGY LTD – PART OF DARO GROUP: COMPANY

OVERVIEW

TABLE 192 BERTIN TECHNOLOGIES: COMPANY OVERVIEW

TABLE 193 FAR UV TECHNOLOGIES, INC.: COMPANY OVERVIEW

TABLE 194 PURE AQUA, INC.: COMPANY OVERVIEW

TABLE 195 PALANTIR TECHNOLOGIES INC.: COMPANY OVERVIEW

TABLE 196 P?SCHNER MICROWAVE POWER SYSTEMS: COMPANY OVERVIEW

List Of Figures

LIST OF FIGURES

FIGURE 1 RESEARCH PROCESS FLOW

FIGURE 2 BIODEFENSE MARKET: RESEARCH DESIGN

FIGURE 3 BOTTOM-UP APPROACH: COMPANY REVENUE ESTIMATION
APPROACH

FIGURE 4 CAGR PROJECTIONS: SUPPLY-SIDE ANALYSIS

FIGURE 5 MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH

FIGURE 6 DATA TRIANGULATION

FIGURE 7 DECONTAMINATION SYSTEMS TO BE LEADING PRODUCT SEGMENT
OF BIODEFENSE MARKET IN 2030

FIGURE 8 AI TECHNOLOGIES TO REGISTER DECENT CAGR DURING FORECAST
PERIOD

FIGURE 9 HOSPITALS & MEDICAL INSTITUTES TO BE LEADING APPLICATION OF
BIODEFENSE IN 2025

FIGURE 10 NORTH AMERICA TO ACCOUNT FOR LARGEST SHARE OF
BIODEFENSE MARKET IN 2025

FIGURE 11 INCREASING ADVANCEMENTS IN BIODEFENSE TECHNOLOGIES TO
DRIVE GROWTH

FIGURE 12 DECONTAMINATION SYSTEMS SEGMENT TO LEAD BIODEFENSE
MARKET IN 2025

FIGURE 13 AI TECHNOLOGIES SEGMENT TO LEAD BIODEFENSE MARKET IN
2025

FIGURE 14 HOSPITALS & MEDICAL INSTITUTES SEGMENT TO LEAD
BIODEFENSE MARKET IN 2025

FIGURE 15 AUSTRALIA TO REGISTER HIGHEST CAGR DURING FORECAST
PERIOD

FIGURE 16 BIODEFENSE MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES,
AND CHALLENGES

FIGURE 17 TRENDS AND DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES

FIGURE 18 VALUE CHAIN ANALYSIS

FIGURE 19 ECOSYSTEM ANALYSIS

FIGURE 20 IMPORT DATA FOR HS CODE 901890, BY COUNTRY, 2020–2024 (USD
THOUSAND)

FIGURE 21 EXPORT DATA FOR HS CODE 901890, 2020–2024 (USD THOUSAND)

FIGURE 22 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS, BY TOP 3
APPLICATIONS

FIGURE 23 KEY BUYING CRITERIA, BY TOP 3 APPLICATIONS

FIGURE 24 AVERAGE SELLING PRICE OF BIODEFENSE PRODUCTS, BY REGION

FIGURE 25 INVESTMENT AND FUNDING SCENARIO, 2020–2024

FIGURE 26 BIODEFENSE MARKET: IMPACT OF AI/GEN AI

FIGURE 27 BUSINESS MODELS IN BIODEFENSE MARKET

FIGURE 28 EVOLUTION OF TECHNOLOGY IN BIODEFENSE MARKET

FIGURE 29 TECHNOLOGY ROADMAP

FIGURE 30 LIST OF MAJOR PATENTS RELATED TO BIODEFENSE, 2014–2025

FIGURE 31 DECONTAMINATION SYSTEMS SEGMENT TO LEAD BIODEFENSE MARKET DURING FORECAST PERIOD

FIGURE 32 AI TECHNOLOGIES SEGMENT TO LEAD BIODEFENSE MARKET IN 2030

FIGURE 33 HOSPITALS & MEDICAL INSTITUTES SEGMENT TO LEAD BIODEFENSE MARKET DURING FORECAST PERIOD

FIGURE 34 BIODEFENSE MARKET, BY REGION, 2025–2030

FIGURE 35 NORTH AMERICA: BIODEFENSE MARKET SNAPSHOT

FIGURE 36 ASIA PACIFIC: BIODEFENSE MARKET SNAPSHOT

FIGURE 37 EUROPE: BIODEFENSE MARKET SNAPSHOT

FIGURE 38 REST OF THE WORLD: BIODEFENSE MARKET SNAPSHOT

FIGURE 39 BIODEFENSE MARKET REVENUE ANALYSIS OF TOP 5 PLAYERS, 2021–2024 (USD MILLION)

FIGURE 40 BIODEFENSE MARKET SHARE ANALYSIS OF KEY PLAYERS, 2024

FIGURE 41 BIODEFENSE MARKET COMPANY EVALUATION MATRIX (KEY PLAYERS), 2024

FIGURE 42 BIODEFENSE MARKET: COMPANY FOOTPRINT

FIGURE 43 BIODEFENSE MARKET: COMPANY EVALUATION MATRIX (STARTUPS/SMES), 2024

FIGURE 44 BRAND/PRODUCT COMPARISON

FIGURE 45 FINANCIAL METRICS OF PROMINENT MARKET PLAYERS

FIGURE 46 VALUATION OF PROMINENT MARKET PLAYERS

FIGURE 47 STERIS: COMPANY SNAPSHOT

FIGURE 48 ASP INTERNATIONAL GMBH: COMPANY SNAPSHOT

FIGURE 49 USHIO INC.: COMPANY SNAPSHOT

FIGURE 50 SOTERA HEALTH COMPANY: COMPANY SNAPSHOT

FIGURE 51 BIOQUELL, AN ECOLAB SOLUTION: COMPANY SNAPSHOT

FIGURE 52 THERMO FISHER SCIENTIFIC INC.: COMPANY SNAPSHOT

FIGURE 53 SKAN AG: COMPANY SNAPSHOT

FIGURE 54 MICROSOFT: COMPANY SNAPSHOT

FIGURE 55 BIO-RAD LABORATORIES, INC.: COMPANY SNAPSHOT

FIGURE 56 AIRBOSS DEFENSE GROUP, INC.: COMPANY SNAPSHOT

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