

# **Sterilization Equipment Market (Eto Sterilization, E-Beam, Gamma, Steam, Low Temperature Sterilization & Contract Services) To 2017**

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## **Abstracts**

The sterilization market has dynamically improved from moist heat sterilization (steam) to the progressive Ethylene Oxide (EtO), gamma radiation and low temperature gas plasma sterilization, and finally to recent technologies like NO<sub>2</sub>-based sterilization. The rise in chronic diseases, increase in the number of surgeries performed, and aging population are the major drivers for the growth of this market. The governments of various countries are taking regulatory actions to fortify hospitals with essential sterilization standards and prevent infections. Hospitals and medical care centers are using variety of technology options to reduce the incidence rate of hospital acquired infections (HAIs).

Similarly, with rise in global food supply and introduction of new and exotic fruits and vegetables, there is the need to ensure safety and quality of these food products. Sterilization, a safety measure, is achieved using technologies like gamma irradiation, ethylene oxide, e-beam, and X-ray.

Pharmaceutical sterilization plays a vital role and helps in making drugs safe for patient use. This is majorly done using filtration technologies and gamma irradiation of pharmaceutical components and powders like APIs. The role of sterilization in medical packaging has been of crucial importance, especially of finished products like saline bottles, needles, syringes, etc. In life sciences applications like research laboratories, steam sterilization (autoclaves) is widely practised to avoid any decontamination of media, culture, equipment, and glassware. Hence, with a wide array of applications, the sterilization market is expected to foresee a stable growth in the coming years. The global sterilization market is valued at \$3.1 billion in 2012 and is estimated to reach \$4.2 billion by 2017 at a CAGR of 6.1%.

Steam/moist heat sterilization, despite being the oldest method, is still the most preferred in a healthcare setting due to its ease of use and low costs as compared to low temperature sterilization. The most frequently used chemicals for sterilization include ethylene oxide and hydrogen peroxide. E-beam and low-temperature hydrogen peroxide gas plasma (LTHPGP) sterilization techniques are gaining popularity over conventional methods due to various advantages conferred by them.

The sterilization services industry has been growing at a healthy growth rate in the past decade. There has been a rise in stringent regulations regarding sterilization imposed by authorities in several developed nations, and this has led to companies outsourcing their sterilization activities to third parties; this is also referred to as contract sterilization services. This trend has helped OEMs of medical devices to reduce their costs substantially.

The major players in the contract sterilization market are Steris Isomedix (U.S.), Sterigenics (U.S.), Synergy Health (U.K.), Medivators (U.S.), and Nordion (Canada), with Synergy leading the pack. The in-house sterilization market will grow faster than contract sterilization in the near future, as the acceptability of technologies like VHP and H<sub>2</sub>O<sub>2</sub> gas plasma, which are employed in a captive (in-house) facility, will increase.

The U.S. constitutes the largest market for sterilization, followed by Europe, and Asia. The Asian market is expected to display favorable growth in the coming years, primarily due to rise in awareness, growth of aging population, increase in number of surgeries, and growth in per capita income.

The major players in the equipment market are Steris Corporation (U.S.), Getinge AB (Sweden), Advanced Sterilization Products (U.S.), 3M (U.S.) and Belimed (Switzerland).

## **Scope of the Report**

This research report categorizes the global sterilization market on the basis of technology, services, and applications. These markets are broken down into segments and sub-segments, providing value analysis for 2010, 2011, and 2012, as well as forecast up to 2017. Each market is comprehensively analyzed by geography (North America, Europe, Asia, and Rest of the World) to provide in-depth information on the global scenario.

## **Global Sterilization Equipment Market**

## Heat Sterilization

### Moist Heat

#### Traditional

Gravity Sterilizers

Pre-vacuum Sterilizers

Steam flush pressure-pulse sterilizers

#### Tabletop sterilizers

### Dry Heat

## Low Temperature Sterilization

Ethylene Oxide Sterilization (EtO)

Vaporized Hydrogen Peroxide (VHP)

Hydrogen Peroxide Gas Plasma

Ozone Gas-based Medical Sterilization

## Filtration

## **In-house and Contract Sterilization Markets**

### In-House Sterilization

Ethylene Oxide

Gamma Sterilization

E-Beam

Others

Contract Sterilization Services

Ethylene Oxide

Gamma Sterilization

E-Beam

Others

### **Global Sterilization Application Market**

Life Sciences

Medical devices

Pharmaceutical

Food

Other

### **Sterilization Market, By Geography**

North America

Europe

Asia

RoW

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