

# **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**

*Sterilization Equipment Market (Eto Sterilization, E-Beam, Gamma, Steam, Low Temperature Sterilization & Contr...*

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

## Contents

### 1 INTRODUCTION

- 1.1 KEY TAKE-AWAYS
- 1.2 Report Description
- 1.3 MARKETS COVERED
- 1.4 STAKEHOLDERS
- 1.5 Research Methodology
  - 1.5.1 Market Size
  - 1.5.2 Market share
  - 1.5.3 Key Data Points from secondary sources
  - 1.5.4 Key Data Points from primary sources
  - 1.5.5 Assumptions

### 2 EXECUTIVE SUMMARY

### 3 MARKET OVERVIEW

- 3.1 Introduction
- 3.2 Market Segmentation
- 3.3 Market Dynamics
  - 3.3.1 Drivers
    - 3.3.1.1 Rise in hospital-acquired infections (HAIs) to trigger growth
    - 3.3.1.2 Increase in surgeries demand development of sterilization technologies
    - 3.3.1.3 Aging population propels growth of the sterilization market
    - 3.3.1.4 Growth of food sterilization industry to drive the market
  - 3.3.2 Restraints
    - 3.3.2.1 Regulatory compliances and stringent requirements mar the growth of the industry
    - 3.3.2.2 Economic downturn & saturation to restrict growth
  - 3.3.3 Opportunities
    - 3.3.3.1 Untapped emerging market provides significant growth opportunities
    - 3.3.3.2 Rise in trend for E-beam radiation sterilization through service sterilization industry
- 3.4 Market Share Analysis
  - 3.4.1 Sterilization equipment market
  - 3.4.2 Sterilization contract services market

## **4 GLOBAL STERILIZATION EQUIPMENT MARKET**

### **4.1 INTRODUCTION**

### **4.2 Heat Sterilization**

#### **4.2.1 Moist Heat (autoclave)**

##### **4.2.1.1 By Products**

###### **4.2.1.1.1 Traditional**

###### **4.2.1.1.2 Tabletop**

##### **4.2.1.2 By Technology**

###### **4.2.1.2.1 Gravity**

###### **4.2.1.2.2 Pre-vacuum**

###### **4.2.1.2.3 Steam flush pressure-pulse**

#### **4.2.2 Dry Heat**

### **4.3 LOW TEMPERATURE Sterilization**

#### **4.3.1 Ethylene Oxide Sterilization (EtO)**

#### **4.3.2 Vaporized Hydrogen Peroxide (VHP)**

#### **4.3.3 Hydrogen Peroxide Gas Plasma**

#### **4.3.4 Ozone Gas-based Medical Sterilization**

### **4.4 FILTRATION MARKET**

## **5 IN-HOUSE & CONTRACT STERILIZATION MARKETS**

### **5.1 INTRODUCTION**

### **5.2 IN-House Sterilization**

#### **5.2.1 Ethylene Oxide**

#### **5.2.2 Gamma Sterilization**

#### **5.2.3 E-Beam**

#### **5.2.4 Others**

### **5.3 contract sterilization services**

#### **5.3.1 Ethylene Oxide**

#### **5.3.2 Gamma Sterilization**

#### **5.3.3 E-Beam**

#### **5.3.4 Others**

## **6 GLOBAL STERILIZATION APPLICATION MARKET**

### **6.1 introduction**

### **6.2 life sciences**

### **6.3 MEDICAL DEVICES**

6.4 PHARMACEUTICAL

6.5 FOOD

6.6 OTHERS

## **7 GEOGRAPHIC ANALYSIS**

7.1 INTRODUCTION

7.2 North America

7.2.1 U.S.

7.2.2 Canada

7.3 Europe

7.3.1 Germany

7.3.2 France

7.3.3 U.K.

7.3.4 Italy

7.3.5 Spain

7.3.6 Rest of europe (ROE)

7.4 Asia

7.4.1 Japan

7.4.2 China

7.4.3 India

7.4.4 RoA

7.5 RoW

## **8 COMPETITIVE LANDSCAPE**

8.1 INTRODUCTION

8.2 MERGERS & ACQUISITIONS

8.3 Agreements, Partnerships, Collaborations, contracts & Joint VENTURES

8.4 NEW PRODUCTs LAUNCH

8.5 Expansion

8.6 approvals

## **9 COMPANY PROFILES (OVERVIEW, FINANCIALS, PRODUCTS & SERVICES, STRATEGY, & DEVELOPMENTS)**

9.1 3M company

9.2 Advanced Sterilization Products services, inc. (a Johnson & Johnson company)

9.3 BELIMED AG (A Metall Zug group COMPANY)

- 9.4 cisa s.p.a.
- 9.5 Getinge group
- 9.6 honeywell international, inc.
- 9.7 Matachana Group
- 9.8 MEDIVATORS (A Cantel Medical COMPANY )
- 9.9 mmm group
- 9.10 nordion, Inc.
- 9.11 Sakura global holding company
- 9.12 steris Corporation
- 9.13 sterigenics international, inc.
- 9.14 synergy health, plc
- 9.15 tso3, inc. (Details on Financials, Product & Services, Strategy, & Developments might not be captured in case of unlisted companies.)

## List Of Tables

### LIST OF TABLES

TABLE 1 GLOBAL STERILIZATION market, by Type, 2010 – 2017 (\$MILLION)

TABLE 2 GLOBAL STERILIZATION equipment MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 3 GLOBAL HEAT STERILIZATION equipment MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 4 HEAT STERILIZATION EQUIPMENT MARKET, BY GEOGRAPHY, 2010 – 2017 (\$MILLION)

TABLE 5 GLOBAL MOIST HEAT STERILIZATION equipment MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 6 MOIST HEAT STERILIZATION equipment MARKET, BY GEOGRAPHY, 2010 – 2017 (\$MILLION)

TABLE 7 GLOBAL TRADITIONAL moist heat STERILIZATION equipment MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 8 STEAM STERILIZATION METHODS

TABLE 9 GLOBAL TABLETOP STERILIZATION equipment MARKET, by type, 2010 – 2017 (\$MILLION)

TABLE 10 Gravity Steam Sterilizers: Minimum Cycle Time

TABLE 11 DRY HEAT STERILIZATION MARKET, BY GEOGRAPHY, 2010 – 2017 (\$MILLION)

TABLE 12 GLOBAL LOW TEMPERATURE STERILIZATION equipment MARKET, by type, 2010 – 2017 (\$MILLION)

TABLE 13 ADVANTAGES & DISADVANTAGES OF EtO

TABLE 14 ETO STERILIZATION equipment MARKET, BY geography, 2010 – 2017 (\$MILLION)

TABLE 15 VHP STERILIZATION equipment MARKET, BY geography, 2010 – 2017 (\$MILLION)

TABLE 16 HYDROGEN GAS PLASMA STERILIZATION equipment MARKET, BY geography, 2010 – 2017 (\$MILLION)

TABLE 17 OZONE STERILIZATION equipment MARKET, BY geography, 2010 – 2017 (\$MILLION)

TABLE 18 FILTRATION STERILIZATION equipment MARKET, BY geography, 2010 – 2017 (\$MILLION)

TABLE 19 GLOBAL STERILIZATION services MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 20 GLOBAL IN-HOUSE STERILIZATION MARKET, BY TYPE, 2010 – 2017

(\$MILLION)

TABLE 21 GLOBAL CONTRACT SERVICES STERILIZATION MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 22 global STERILIZATION EQUIPMENT MARKET for LIFE SCIENCES, by type, 2010 – 2017 (\$MILLION)

TABLE 23 global STERILIZATION SERVICES MARKET for LIFE SCIENCES, by type, 2010 – 2017 (\$MILLION)

TABLE 24 global STERILIZATION equipment MARKET for MEDICAL DEVICES, by type, 2010 – 2017 (\$MILLION)

TABLE 25 global STERILIZATION SERVICE MARKET for MEDICAL DEVICES, by type, 2010 – 2017 (\$MILLION)

TABLE 26 global STERILIZATION equipment MARKET for PHARMACEUTICALS, by type, 2010 – 2017 (\$MILLION)

TABLE 27 global STERILIZATION SERVICE MARKET for PHARMACEUTICALS, by type, 2010 – 2017 (\$MILLION)

TABLE 28 global STERILIZATION equipment MARKET for FOOD, by type, 2010 – 2017 (\$MILLION)

TABLE 29 global STERILIZATION SERVICES MARKET for FOOD, by type, 2010 – 2017 (\$MILLION)

TABLE 30 global STERILIZATION equipment MARKET for OTHER applications, by type, 2010 – 2017 (\$MILLION)

TABLE 31 global STERILIZATION SERVICE MARKET for OTHER applications, by type, 2010 – 2017 (\$MILLION)

TABLE 32 STERILIZATION MARKET, BY GEOGRAPHY, 2010 – 2017 (\$MILLION)

TABLE 33 NORTH AMERICA: STERILIZATION MARKET, BY type, 2010 – 2017 (\$MILLION)

TABLE 34 NORTH AMERICA: STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 35 NORTH AMERICA: HEAT STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 36 NORTH AMERICA: LOW TEMPERATURE STERILIZATION EQUIPMENT MARKET, BY technology, 2010 – 2017 (\$MILLION)

TABLE 37 NORTH AMERICA: in-house & contract STERILIZATION MARKETs, 2010 – 2017 (\$MILLION)

TABLE 38 NORTH AMERICA: STERILIZATION MARKET, BY COUNTRY, 2010 – 2017 (\$MILLION)

TABLE 39 U.S.: STERILIZATION MARKET, BY type, 2010 – 2017 (\$MILLION)

TABLE 40 U.S.: STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 41 U.S.: HEAT STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 42 U.S.: in-house & contract STERILIZATION MARKETs, 2010 – 2017 (\$MILLION)

TABLE 43 CANADA: STERILIZATION MARKET, BY type, 2010 – 2017 (\$MILLION)

TABLE 44 CANADA: STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 45 CANADA: HEAT STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 46 CANADA: in-house & contract STERILIZATION MARKETs, 2010 – 2017 (\$MILLION)

TABLE 47 EUROPE: STERILIZATION MARKET, BY type, 2010 – 2017 (\$MILLION)

TABLE 48 EUROPE: STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 49 EUROPE: HEAT STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 50 EUROPE: LOW TEMPERATURE STERILIZATION EQUIPMENT MARKET, BY technology, 2010 – 2017 (\$MILLION)

TABLE 51 EUROPE: in-house & contract STERILIZATION MARKETs, 2010 – 2017 (\$MILLION)

TABLE 52 EUROPE: STERILIZATION MARKET, BY COUNTRY, 2010 – 2017 (\$MILLION)

TABLE 53 GERMANY: STERILIZATION MARKET, BY type, 2010 – 2017 (\$MILLION)

TABLE 54 GERMANY: STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 55 GERMANY: HEAT STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 56 GERMANY: in-house & contract STERILIZATION MARKETs, 2010 – 2017 (\$MILLION)

TABLE 57 FRANCE: STERILIZATION MARKET, BY type, 2010 – 2017 (\$MILLION)

TABLE 58 FRANCE: STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 59 FRANCE: HEAT STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 60 FRANCE: in-house & contract STERILIZATION MARKETs, 2010 – 2017 (\$MILLION)

TABLE 61 U.K.: STERILIZATION MARKET, by type, 2010 – 2017 (\$MILLION)

TABLE 62 U.K.: STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 63 U.K.: HEAT STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 64 U.K: in-house & contract STERILIZATION MARKETs, 2010 – 2017 (\$MILLION)

TABLE 65 ITALY: STERILIZATION MARKET, BY type, 2010 – 2017 (\$MILLION)

TABLE 66 ITALY: STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 67 ITALY: HEAT STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 68 ITALY: in-house & contract STERILIZATION MARKETs, 2010 – 2017 (\$MILLION)

TABLE 69 SPAIN: STERILIZATION MARKET, BY type, 2010 – 2017 (\$MILLION)

TABLE 70 SPAIN: STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 71 SPAIN: HEAT STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 72 SPAIN: in-house & contract STERILIZATION MARKETs, 2010 – 2017 (\$MILLION)

TABLE 73 ROE: STERILIZATION MARKET, BY type, 2010 – 2017 (\$MILLION)

TABLE 74 ROE: STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 75 ROE: HEAT STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 76 ROE: in-house & contract STERILIZATION MARKETs, 2010 – 2017 (\$MILLION)

TABLE 77 ASIA: STERILIZATION MARKET, BY type, 2010 – 2017 (\$MILLION)

TABLE 78 ASIA: STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 79 ASIA: HEAT STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 80 ASIA: LOW TEMPERATURE STERILIZATION EQUIPMENT MARKET, BY technology, 2010 – 2017 (\$MILLION)

TABLE 81 ASIA: in-house & contract STERILIZATION MARKETs, 2010 – 2017 (\$MILLION)

TABLE 82 ASIA: STERILIZATION MARKET, BY COUNTRY, 2010 – 2017 (\$MILLION)

TABLE 83 JAPAN: STERILIZATION MARKET, BY type, 2010 – 2017 (\$MILLION)

TABLE 84 JAPAN: STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 85 JAPAN: HEAT STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 –

2017 (\$MILLION)

TABLE 86 JAPAN: in-house & contract STERILIZATION MARKETs, 2010 – 2017 (\$MILLION)

TABLE 87 CHINA: STERILIZATION MARKET, BY type, 2010 – 2017 (\$MILLION)

TABLE 88 CHINA: STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 89 CHINA: HEAT STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 90 CHINA: in-house & contract STERILIZATION MARKETs, 2010 – 2017 (\$MILLION)

TABLE 91 INDIA: STERILIZATION MARKET, BY type, 2010 – 2017 (\$MILLION)

TABLE 92 INDIA: STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 93 INDIA: HEAT STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 94 INDIA: in-house & contract STERILIZATION MARKETs, 2010 – 2017 (\$MILLION)

TABLE 95 RoA: STERILIZATION MARKET, BY type, 2010 – 2017 (\$MILLION)

TABLE 96 RoA: STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 97 RoA: HEAT STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 98 RoA: in-house & contract STERILIZATION MARKETs, 2010 – 2017 (\$MILLION)

TABLE 99 RoW: STERILIZATION MARKET, BY type, 2010 – 2017 (\$MILLION)

TABLE 100 RoW: STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 101 RoW: HEAT STERILIZATION EQUIPMENT MARKET, BY TYPE, 2010 – 2017 (\$MILLION)

TABLE 102 RoW: LOW TEMPERATURE STERILIZATION EQUIPMENT MARKET, BY technology, 2010 – 2017 (\$MILLION)

TABLE 103 RoW: in-house & contract STERILIZATION MARKETs, 2010 – 2017 (\$MILLION)

TABLE 104 MERGERS & ACQUISITIONS, 2010 – 2012

TABLE 105 Agreements, Partnerships, Collaborations, contracts & Joint VENTURES, 2010 – 2012

TABLE 106 NEW PRODUCTs LAUNCH, 2010 – 2012

TABLE 107 Expansion, 2010 – 2012

TABLE 108 approvals, 2010 – 2012

TABLE 109 3M company: Total Revenue and R&D Expenditure, 2009 – 2011 (\$Million)

TABLE 110 3m company: Total revenue, by segments, 2009 – 2011 (\$Million)

TABLE 111 3m company: total revenue, by geography, 2009 – 2011 (\$Million)

TABLE 112 JOHNSON & JOHNSON: TOTAL Revenue AND R&D EXPENDITURE, 2009 – 2011 (\$MILLION)

TABLE 113 JOHNSON & JOHNSON: TOTAL revenue, BY SEGMENTs, 2009 – 2011 (\$MILLION)

TABLE 114 JOHNSON & JOHNSON: TOTAL revenue, BY GEOGRAPHY, 2009 – 2011 (\$MILLION)

TABLE 115 Metall Zug Group: Total Revenue and R&D Expenditure, 2009 – 2011 (\$Million)

TABLE 116 Metall Zug Group: Total revenue, by segments, 2009 – 2011 (\$Million)

TABLE 117 Metall Zug Group: total revenue, by geography, 2009 – 2011 (\$Million)

TABLE 118 GETINGE GROUP: TOTAL SALES AND R&D EXPENDITURE, 2009 – 2011 (\$MILLION)

TABLE 119 GETINGE GROUP: TOTAL REVENUE, BY SEGMENTs, 2009 – 2011 (\$MILLION)

TABLE 120 GETINGE GROUP: TOTAL SALES, BY GEOGRAPHY, 2009 – 2011 (\$MILLION)

TABLE 121 honeywell international, inc.: Total Revenue and R&D Expenditure, 2009 – 2011 (\$Million)

TABLE 122 honeywell international, inc.: Total revenue, by segments, 2009 – 2011 (\$Million)

TABLE 123 Honeywell international, inc.: total revenue, by geography, 2009 – 2011 (\$Million)

TABLE 124 Cantel medical corporation: Total Revenue and R&D Expenditure 2010 – 2012 (\$Million)

TABLE 125 Cantel medical corporation: Total revenue, by segments, 2010 – 2012 (\$Million)

TABLE 126 Cantel medical corporation: total revenue, by geography, 2010 – 2012 (\$Million)

TABLE 127 nordion, Inc.: Total Revenue and R&D Expenditure, 2009 – 2011 (\$Million)

TABLE 128 nordion, inc.: Total revenue, by segments, 2009 – 2011 (\$Million)

TABLE 129 Nordion, inc.: total revenue, by geography, 2009 – 2011 (\$Million)

TABLE 130 Steris corporation: Total Revenue and R&D Expenditure, 2010 – 2012 (\$Million)

TABLE 131 Steris corporation: Total revenue, by segments, 2010 – 2012 (\$Million)

TABLE 132 Steris corporation: Total revenue, by segments, 2010 – 2012 (\$Million)

TABLE 133 Steris corporation: total revenue, by geography, 2010 – 2012 (\$Million)

TABLE 134 synergy health, plc: Total Revenue, 2010 – 2012 (\$Million)

TABLE 135 synergy health, plc: Total revenue, by segments, 2010 – 2012 (\$Million)

TABLE 136 synergy health, plc: total revenue, by geography, 2010 – 2012 (\$Million)

TABLE 137 TSo3, inc.: Total Revenue and R&D Expenditure, 2009 – 2011 (\$Million)

TABLE 138 TSo3, inc.: Total revenue, by geography, 2009 – 2011 (\$Million)

## List Of Figures

### LIST OF FIGURES

FIGURE 1 GLOBAL STERILIZATION EQUIPMENT & SERVICES MARKET, 2010 – 2017 (\$MILLION)

FIGURE 2 GLOBAL STERILIZATION MARKET segmentation

FIGURE 3 MARKET DYNAMICS

FIGURE 4 GLOBAL STERILIZATION EQUIPMENT MARKET SHARE ANALYSIS, BY KEY PLAYERS, 2012

FIGURE 5 Key Growth Strategies, 2010 – 2012

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