

Infection Control Market by Product (Sterilization (Hydrogen Peroxide, EtO, Gamma, E-Beam), Disinfection (Wipes, Liquids, Disinfectors), Services, Gowns, Endoscope Reprocessing), End User (Hospital & Clinics, Pharmaceuticals) - Global Forecast to 2029

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Abstracts

The infection control market is valued at an estimated USD 51.0 billion in 2024 and is projected to reach USD 69.2 billion by 2029, at a CAGR of 6.3% during the forecast period. Recent key trends driving the infection control market include increased focus on antimicrobial surfaces, adoption of UV-C disinfection technology, and growth in demand for point-of-care testing. These trends are driven by heightened awareness of infection prevention, regulatory mandates, and the need for efficient and effective healthcare practices.

Opportunities in the infection control market include increasing adoption of advanced technologies, rising demand for infection prevention in emerging economies, and growing awareness of healthcare-associated infections. These opportunities can drive market growth by innovation, expanding market reach, and fostering greater investment in infection control solutions worldwide.

“The endoscope reprocessing products segment is projected to witness the highest growth in the infection control market, by products, during the forecast period.”

The infection control market can be broadly classified into sterilization products & services, consumables & accessories, cleaning & disinfection products, protective barriers, and endoscope reprocessing products depending on the product. The

endoscope reprocessing products segment is projected to witness the highest growth in the infection control market, by products, during the forecast period. The endoscope reprocessing products market is growing, commanding significant attention and dominance. This segment specializes in providing essential sterilization and disinfection solutions tailored specifically for endoscopic devices used in medical procedures. Its dominance is attributed to the increasing utilization of endoscopic procedures worldwide, coupled with stringent regulatory requirements mandating effective reprocessing to prevent Healthcare-Associated Infection. Consequently, the segment continues to experience robust growth due to its critical role in maintaining patient safety and infection prevention standards.

“Hospitals and clinics segment, by end-user, has the highest market share.”

Hospitals and clinics represent the largest end user segment in the infection control market, commanding a significant share due to several key factors. As primary providers of healthcare services, hospitals and clinics prioritize infection control to ensure patient safety and maintain high standards of care. The prevalence of Healthcare-Associated Infections (HAIs) within these settings drives the demand for infection control products and services.

Additionally, the increasing number of hospitals and clinics globally, coupled with the rising volume of surgical procedures performed, further fuels market growth within this segment. Moreover, the growing geriatric population, which is more susceptible to chronic diseases and infections, contributes to the demand for infection control measures in healthcare facilities. Government initiatives aimed at improving infection prevention standards and regulations also drive market growth within hospitals and clinics, reinforcing their position as the primary end user segment in the infection control market.

“Asia Pacific market to witness the highest growth during the forecast period.”

In the year 2022, the Asia Pacific region accounted for the highest growth rate in the infection control market, with countries like India and China standing out as areas with the highest growth potential. The major factors promoting the growth of the infection control market in this region are region's expanding healthcare infrastructure, increasing adoption of advanced infection control technologies, and supportive government initiatives aimed at enhancing infection prevention measures.

A breakdown of the primary participants (supply-side) for the infection control market

referred to for this report is provided below:

By Company Type: Tier 1: 55%, Tier 2: 30%, and Tier 3: 15%

By Designation: C-level: 28%, Director-level: 43%, and Others: 39%

By Region: North America: 35%, Europe: 20%, Asia Pacific: 30%, Latin America: 7%; Middle East & Africa: 5%, and GCC Countries: 3%

The prominent players operating in the infection control market are STERIS plc. (US), Getinge AB (Sweden), Ecolab, Inc. (US), 3M Company (US), Advanced Sterilization Products (US), Sotera Health LLC (US), MMM Group (Germany), MATACHANA GROUP (Spain), Belimed AG (Switzerland), Metrex Research LLC (US), Reckitt Benckiser (UK), Pal International (UK), Olympus Corporation (Japan), Melag Medizintechnik GmbH & Co. KG (Germany), Miele Group (Germany), Systec GmbH & Co. KG (Germany), Contec, Inc. (US), Continental Equipment Company (US), MEDALKAN (Greece), C.R.M. S.R.L. Medical Equipment (Italy), and Spire Integrated Solutions (US),

Research Coverage:

The market study covers the infection control market across various segments. It aims to estimate the market size and the growth potential of this market across different segments by product & service, end-user, and region. The 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 product and business offerings, recent developments, and key market strategies.

Reasons to Buy the Report

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall infection control market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

This report provides insights into the following pointers:

Analysis of key drivers (Rising prevalence of healthcare-associated infections (HAIs), Growing number of surgeries, Advancement in reprocessing technologies, Rising emphasis on the sterilization and disinfection of food, Advancements in sterilization equipment technology, Growing trend of outsourcing services among pharmaceutical companies, medical device manufacturers, and hospitals), restraints (Growing concerns about the safety of reprocessed instruments, Consequences associated with the use of chemical disinfectants, High cost associated with endoscopy reprocessing coupled with the limited reimbursements in developing nations,), opportunities (The increasing prevalence of medical devices and pharmaceutical companies in developing nations, Growing utilization of E-beam sterilization, Reintegration of ethylene oxide sterilization) and challenges (Sterilization of Advanced Medical Devices, Alternative methods for surface disinfection, Increasing adoption of single-use medical nonwovens and devices).

Market Penetration: Comprehensive information on product portfolios offered by the top players in the global infection control market. The report analyzes this market by product & service, end user, and region.

Product Enhancement/Innovation: Detailed insights on upcoming trends and product launches in the global infection control market.

Market Development: Comprehensive information on the lucrative emerging markets by product & service, end user, and region.

Market Diversification: Exhaustive information about new products and services, growing geographies, recent developments, and investments in the global infection control market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, product and service offerings, and capabilities of leading players in the global infection control market.

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About

The global infection control market will grow at a steady pace of around 6% from \$10.5 billion in 2012 to \$14.0 billion by 2017.

The rise in tide of cleaning standards and mounting pressure for sterilized and disinfected medical devices in hospitals and clinics has triggered the growth of medical sterilization and disinfection market. The increase in hospital acquired infections or nosocomial infections have forced the medical authorities to take stringent regulatory actions to curb these infections with the use of sterilized and disinfected medical devices.

The major players in Infection Control Market are

Getinge (Sweden)

Steris (U.S.)

Advanced Sterilization Product (U.S.)

Medivators (U.S.)

3M (U.S.)

Cardinal Health (U.S.)

There has been a rise in trend for contract sterilization services due to stringent regulatory requirements from regulatory agencies like ISO and AMMI. The OEMs prefer outsourcing as it helps in cost reduction in sterilizing equipments in-house by focusing on their core competencies of business. However, in the near future in-house sterilization is expected to give healthy competition to contract sterilization service market mainly due to advent of hydrogen gas plasma and vapor hydrogen peroxide that are preferred to be used in-house. It also provides better quality assurance with just-in-time facility for sterilized products. Gamma and E-beam services are poised to have

better growth over ETO in the near future due to their wider applications with respect to food, pharmaceutical, medical devices, life sciences and cosmetic products sterilization.

North America accounts for the largest share of the infection control market; however, Asia is expected to display favorable growth in the coming years, primarily due to rise in awareness, growth of ageing population, increase in number of surgeries, and growth in per capita income.

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