

South & Central America Antimicrobial Coatings for Medical Devices Market Size and Forecast (2021 - 2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Material (Metallic Coatings and Non-Metallic Coatings), Coating Type (Antibacterial Coatings, Antiviral Coatings, and Other Coating Types), Device Type (Catheters, Implantable Devices, Surgical Instruments, and Other Device Types), Application (General Surgery, Cardiovascular, Orthopedics, Gynecology, Dentistry, and Other Applications), and End User (Medical Device Manufacturers, Contract Manufacturers, and Service Providers)

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Abstracts

The South & Central America antimicrobial coating for medical device market is projected to grow significantly, reaching an estimated US\$ 255.92 million by 2031, up from US\$ 125.06 million in 2024. This growth represents a compound annual growth rate (CAGR) of 11.2% from 2025 to 2031.

Executive Summary and Market Analysis

The market for antimicrobial coatings in medical devices across South & Central America is primarily segmented into Brazil, Argentina, and the Rest of South & Central America. The increasing adoption of antimicrobial coatings is driven by the need to

mitigate healthcare-associated infections (HAIs) and the rising awareness campaigns led by various organizations promoting the benefits of antimicrobial-coated medical devices. Additionally, heightened safety and hygiene awareness, along with stringent regulations, are expected to further propel market growth in the region.

Strategic Insights

Market Segmentation Analysis

The antimicrobial coating for medical devices market can be analyzed through several key segments:

By Material: The market is divided into metallic and non-metallic coatings. In 2024, metallic coatings dominated the market share.

By Coating Type: This segment includes antibacterial coatings, antiviral coatings, and others, with antibacterial coatings holding the largest market share in 2024.

By Device Type: The market is segmented into catheters, implantable devices, surgical instruments, and others, where implantable devices accounted for the largest share in 2024.

By Application: The applications include general surgery, cardiovascular, orthopedics, gynecology, dentistry, and others, with the cardiovascular segment leading in market share in 2024.

By End User: This segment includes medical device manufacturers, contract manufacturers, and service providers, with medical device manufacturers holding the largest share in 2024.

Market Outlook

The antimicrobial coatings market is experiencing robust growth, supported by increased investments from both public and private sectors aimed at addressing HAIs and the growing challenge of antimicrobial resistance (AMR). Governments and health organizations worldwide are recognizing the critical need for preventive measures to combat infection risks and reduce reliance on antibiotics.

Funding organizations such as the National Institutes of Health (NIH), CARB-X in the US, and the Biomedical Advanced Research and Development Authority (BARDA) are actively supporting the development of antimicrobial surface technologies. These organizations have initiated funding programs to accelerate research and innovation in this vital area. For instance, the EIC Accelerator has provided significant funding to companies like Spartha Medical in France, which received over 2.4 million euros to advance their multifunctional antimicrobial coatings toward clinical trials and commercialization.

The private investment landscape is also evolving, with venture capital firms and strategic investors increasingly recognizing the potential of MedTech and biotech startups that are developing innovative, biocompatible antimicrobial coatings. These advancements are not only crucial for healthcare but also present lucrative growth opportunities, especially given the rising costs associated with HAIs and the implementation of stricter hospital safety standards.

The collaboration between public and private funding is fostering a strong pipeline of innovation and readiness for commercialization, positioning antimicrobial coatings as essential solutions in the global fight against infections and device-resistant pathogens.

Country Insights

The South & Central America antimicrobial coating for medical device market is primarily composed of Brazil, Argentina, and the Rest of South & Central America, with Brazil holding the largest market share in 2024. Healthcare facilities in Brazil are increasingly burdened by device-associated HAIs, including central line-associated bloodstream infections (CLABSI), catheter-associated urinary tract infections (CAUTI), and ventilator-associated pneumonia (VAP). Studies have shown a rise in these infections, with a multicenter cohort study indicating that out of 128,247 patients, 4,066 (3.2%) had at least one HAI, highlighting the critical need for effective infection control measures.

Antimicrobial coatings enhance the durability and appearance of medical devices while providing corrosion resistance and inhibiting microbial growth, thus protecting patients from infectious diseases. Government initiatives aimed at preventing HAIs are driving the adoption of these coatings in healthcare settings. In Brazil, a task force established in 2018 promotes Antimicrobial Stewardship Programs (ASPs) to encourage responsible antimicrobial use. However, a recent survey revealed that over half of adult

ICUs in Brazil lack ASPs, indicating a significant opportunity for antimicrobial coatings to play a vital role in infection prevention.

Company Profiles

Key players in the South & Central America antimicrobial coating for medical device market include The Sherwin-Williams Co, PPG Industries Inc, CytaCoat AB, Covalon Technologies Ltd, Koninklijke DSM NV, Specialty Coating Systems Inc., AST Products Inc, Hydromer Inc, BioInteractions Ltd, and Spartha Medical SAS. These companies are employing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative solutions to consumers.

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