

Global Sterilization Equipment - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 114 pages | Mordor Intelligence

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Report description:

The Global Sterilization Equipment Market size is estimated at USD 8.94 billion in 2024, and is expected to reach USD 12.77 billion by 2029, growing at a CAGR of 7.37% during the forecast period (2024-2029).

The COVID-19 pandemic has altered healthcare priorities, adversely impacting healthcare management. In the initial days of the pandemic, several countries were in lockdown. They suspended trade with other countries and implemented travel restrictions, leading to a decline in healthcare services such as treatments, diagnosis, and surgical procedures in the first half of 2020. Preventing hospital-acquired infections is a critical aspect of the clinical management of COVID-19, as hospital-acquired infections have been a common feature of such outbreaks. According to the study titled 'Hospital-acquired SARS-CoV-2 infection in the UK's first COVID-19 pandemic wave', published in August 2021, 11.3% of patients with COVID-19 in 314 UK hospitals became infected after hospital admission. This rate increased to 15.8% in May 2020. Thus, the outbreak has impacted the healthcare facilities' ability to manage hospital-acquired infections, significantly increasing the demand for sterilizers. Due to the rising COVID-19 cases, government associations also worked toward reducing the COVID-19 impact. For instance, as per a March 2020 update by the US Food and Drug Administration (USFDA), Guidance for Industry and Food and Drug Administration Staff, it is adequate to maintain the supply of sterilizers, disinfectant devices, and air purifiers that can facilitate the rapid turnaround of sterilized or disinfected medical equipment and help reduce the risk of viral exposure for patients and healthcare providers to SARS-CoV-2 for public health emergency during the COVID-19 pandemic. The USFDA believes that the policy outlined will help address these urgent public health concerns by increasing the availability of sterilizers, disinfectant devices, and air purifiers during this public health emergency.

With the growing global population, the prevalence of various infectious diseases has rapidly increased. Many of these diseases require medical interventions and surgeries. The instruments and devices used in the surgeries need to be sterilized. Moreover,

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the infected instruments may give rise to the cross-transmission of diseases. According to the National Plastic Surgery Statistics 2020 by the American Society of Plastic Surgeons, 2,314,720 cosmetic surgical procedures were performed in the United States in 2020, and 2,678,302 surgeries were performed in 2019. Additionally, the total number of reconstructive procedures performed in 2020 and 2019 were 6,878,486 and 6,652,591, respectively, in the United States. As these surgeries require sterilized instruments, the market is expected to witness significant growth in the coming years.

These factors have given rise to the need for sterilization equipment to prevent the further spread of infectious diseases. The expansion of pharmaceutical companies has also been a major factor in the market's growth. However, stringent regulatory standards for approval, production of these devices, and disadvantages of chemical agents used as chemical sterilants in some equipment, which may cause potential damage to the eyes and skin, have been restraining the market's growth.

Sterilization Equipment Market Trends

High-temperature Sterilization Equipment Dominates the Market

High-temperature equipment is the most widely used and the most dependable sterilization equipment. High-temperature sterilization is usually nontoxic to patients, staff, and the environment and is highly microbicidal. It also penetrates deep into the medical devices and is less costly than other sterilization equipment, thus making it cost-effective. These factors are responsible for the dominance of this segment in the market. High-temperature sterilization equipment is further sub-segmented into steam sterilization and dry sterilization.

The increasing number of several surgical procedures is boosting the high-temperature sterilization of surgical devices used in the process, which may drive the segment's growth. As per the American Joint Replacement Registry's Annual Report 2020, 1,897,050 primary and revision hip and knee arthroplasty procedures were performed between 2012 and 2019 in the United States. About 995,410 total knee arthroplasty and 625,097 total hip arthroplasty were also performed from 2012 to 2019 in the United States.

According to the American Society for Metabolic and Bariatric Surgery Statistics, around 256,000 surgeries and 252,000 surgeries were performed in 2019 and 2018, respectively, in the United States alone. These statistics show an increase in the number of bariatric surgeries, which is driving the growth of the overall market.

Moreover, the launch of new products in the segment may drive the market's growth. For instance, in May 2020, Esco launched Esco CelCulture CO2 Incubator with High Heat Sterilization (CCL-HHS). It has proven effective in killing resistant fungi, bacterial spore, and vegetative cells that may contaminate the workspace. Thus, such factors are expected to boost the segment's growth during the forecast period.

North America to Witness the Fastest Growth

North America experienced positive growth in the sterilization equipment market, and it is estimated to witness significant growth over the forecast period. The increasing risk of cross-contamination and hospital-acquired infections, rising number of surgeries, the presence of major market players, and growth in R&D procedures are expected to drive the market in the region. The United States is expected to dominate the North American market.

According to the '2020 HAI Progress Report Executive Summary' report published by the Centers for Disease Control and Prevention, approximately one in 31 US patients contract at least one hospital-acquired infection, highlighting the need for improvements in patient care practices in the country's healthcare facilities. Thus, hospital-acquired infections in the country are driving the need for proper hygiene maintenance and sterilization, including timely changing of hospital curtains.

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In addition, the elderly population is prone to surgeries and is at higher risk of infections due to a weakened immune system. According to the World Ageing Report 2019, the country's elderly population is expected to increase from 53.340 million in 2019 to 83.813 million in 2050, thus increasing the incidence of infectious diseases and contributing to the market's growth.

The technological advancements in the field are also driving the market. For instance, in September 2020, Midmark Corporation launched the new Sterilizer Data Logger and the updated Midmark M3 Steam Sterilizer, bringing speed, simplicity, and compliance to instrument processing in dental practices in the United States.

Hence, there has been a surge in demand for medical devices and other instruments, increasing the demand for sterilization equipment.

Sterilization Equipment Industry Overview

The majority of sterilization equipment is being manufactured by global players. Market leaders with more funds for research and a better distribution system established their positions in the market. Major market players are Getinge AB, Fortive Corporation, Anderson Products, Cantel Medical, and Steris PLC.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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