

**Medical Filtration Market by Material (Polyethersulfone; Polyvinylidene fluoride), Applications (Dialysis; Sterile Processing), Process Technology (Ultrafiltration; Microfiltration), Design/Process, End-Users & Region - Global Forecast to 2030**

Market Report | 2025-02-13 | 354 pages | MarketsandMarkets

**AVAILABLE LICENSES:**

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

**Report description:**

The medical filtration market is projected to reach USD 9.35 billion by 2030 from USD 6.29 billion in 2024, at a CAGR of 6.8%. The urgent demand for quality filtration solutions serves as a major driving force for this market, especially with healthcare providers and research institutions prioritizing patient safety along with effective products. Advanced filtration technologies that ensure the removal of contaminants have therefore become paramount. This trend is majorly influenced by stringent regulatory standards and rising importance of maintaining sterile environments in medical settings. There is also growing demand for reliable filtration systems to support clinical and diagnostics applications, supported by the increase in chronic diseases in laboratories. Hence, the companies have ample opportunities to innovate and develop specialized filtration products catering to such evolving needs and enhancing their market presence and driving future growth.

"Based on material, PVDF is the second fastest growing material in medical filtration market during the forecast period, in terms of value."

PVDF is the second-fastest-growing material in the medical filtration market due to its exceptional chemical resistance, high thermal stability, and excellent mechanical properties. These properties make it very suitable for demanding medical applications like sterile filtration and membrane-based devices. Compatibility with a wide range of sterilization techniques such as autoclaving and gamma radiation makes PVDF highly useful in medical filtration. Its hydrophobic nature and resistance to aggressive cleaning agents also make it increasingly popular. As healthcare and bioprocessing technologies advance, the demand for strong and efficient filtration materials grow increasing the adoption of PVDF .

"Based on end-use industry, hospitals account the largest share in medical filtration market during the forecast period, in terms of value."

The largest market share of the medical filtration market is captured by hospitals due to their role in infection prevention and

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scott's-international.com

www.scott's-international.com

patient safety. In fact, rising hospital admissions on account of surging chronic diseases, surgical procedures, and the aging population is boosting the demand for advanced filtration systems. Hospitals rely heavily on filtration solutions in terms of sterile air and water for medical devices including ventilators, IV infusion systems, and surgical tools. Growth in infection control in hospitals coupled with the necessity to meet severe regulatory standards leads to further growth in adoption. Moreover, developing healthcare infrastructure in many emerging economies contributes to hospitals' being the top end-use industry. "Based on region, North America accounts the largest share and Asia Pacific is the fastest growing region in medical filtration market, in terms of value."

North America accounts the largest share in medical filtration market majorly because of its developed healthcare infrastructure, strict regulatory standards, and high expenditure on healthcare services. This is further fueled by significant presence of major medical filtration manufacturing companies in the region with high demands for advanced filtration solutions. Increased prevalence of chronic diseases along with an aging population has created a need for more filtration systems within hospitals, laboratories, and in home care. Infection control, as also seen within the North America, has further added to the use of advanced filtration technologies following COVID-19. Asia Pacific is a rapidly growing market for medical filtration, supported by rapid urbanization, expansive healthcare infrastructure growth, and the increasing investments being made in medical industries. Its large and aging population, with improved awareness of healthcare hygiene, encourages the consumption of medical filtration products. China and India are significant emerging economies since the governments and medical tourism drive the country to grow more rapidly.

In the process of determining and verifying the market size for several segments and subsegments identified through secondary research, extensive primary interviews were conducted. A breakdown of the profiles of the primary interviewees are as follows:

- By Company Type: Tier 1 - 40%, Tier 2 - 30%, and Tier 3 - 30%
- By Designation: Directors- 35%, Managers - 25%, and Others - 40%
- By Region: North America - 22%, Europe - 22%, Asia Pacific - 45%, RoW - 11%

The key players in this market are Merck KGaA (Germany), 3M (Solventum) (US), Danaher (US), Sartorius AG (Germany), Veolia (France), Thermo Fisher Scientific Inc (US), Donaldson Company Inc (US), Baxter (US), Parker Hannifin Corp (US), Entegris (US), Asahi Kasei Corporation (Japan), and Mann+Hummel (Germany).

#### Research Coverage

This report segments the medical filtration market based on material, process technology, design/process, application, end-use industry, and region, and provides estimations for the overall value of the market across various regions. A detailed analysis of key industry players has been conducted to provide insights into their business overviews, products and services, key strategies, new product launches, expansions, and mergers and acquisitions associated with the medical filtration market.

#### Key benefits of buying this report

This research report focuses on various levels of analysis, including industry analysis (industry trends), market ranking analysis of top players, and company profiles, which together provide an overall view of the competitive landscape, emerging and high-growth segments of the medical filtration market, high-growth regions, and market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

- Analysis of key drivers (Growing demand for high quality filtration solutions, Regulatory and quality standards and Growing focus on infection control), restraints (High cost of advanced filtration systems), opportunities (Growing healthcare investment in emerging economies and Advancements in filtration technologies) and challenges (Disposal of filters and Product performance variability).
- Market Penetration: Comprehensive information on the medical filtration market offered by top players in the global medical filtration market.
- Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the medical filtration market.
- Market Development: Comprehensive information about lucrative emerging markets - the report analyzes the markets for medical filtration market across regions.
- Market Diversification: Exhaustive information about new products, untapped regions, and recent developments in the global

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

medical filtration market

- Competitive Assessment: In-depth assessment of market shares, strategies, products, and manufacturing capabilities of leading players in the medical filtration market

## Table of Contents:

1	INTRODUCTION	32
1.1	STUDY OBJECTIVES	32
1.2	MARKET DEFINITION	32
1.3	STUDY SCOPE	33
1.3.1	MARKETS COVERED AND REGIONAL SCOPE	33
1.3.2	INCLUSIONS & EXCLUSIONS	34
1.3.3	YEARS CONSIDERED	34
1.3.4	CURRENCY CONSIDERED	34
1.3.5	UNITS CONSIDERED	34
1.4	STAKEHOLDERS	35
1.5	SUMMARY OF CHANGES	35
2	RESEARCH METHODOLOGY	36
2.1	RESEARCH DATA	36
2.1.1	SECONDARY DATA	37
2.1.1.1	List of key secondary sources	37
2.1.1.2	Key data from secondary sources	37
2.1.2	PRIMARY DATA	38
2.1.2.1	Key data from primary sources	38
2.1.2.2	List of key primary interview participants	39
2.1.2.3	Key industry insights	39
2.1.2.4	Breakdown of interviews with experts	39
2.2	MARKET SIZE ESTIMATION	40
2.2.1	BOTTOM-UP APPROACH	40
2.2.2	TOP-DOWN APPROACH	41
2.3	GROWTH FORECAST	42
2.4	DATA TRIANGULATION	43
2.5	FACTOR ANALYSIS	44
2.6	RESEARCH ASSUMPTIONS	44
2.7	RESEARCH LIMITATIONS AND RISK ANALYSIS	45
3	EXECUTIVE SUMMARY	46
4	PREMIUM INSIGHTS	50
4.1	ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN MEDICAL FILTRATION MARKET	50
4.2	MEDICAL FILTRATION MARKET, BY MATERIAL	50
4.3	MEDICAL FILTRATION MARKET, BY APPLICATION	51
4.4	MEDICAL FILTRATION MARKET, BY END USER	51
4.5	MEDICAL FILTRATION MARKET, BY KEY COUNTRY	52
5	MARKET OVERVIEW	53
5.1	INTRODUCTION	53
5.2	MARKET DYNAMICS	53
5.2.1	DRIVERS	54
5.2.1.1	Increasing demand for advanced healthcare solutions	54
5.2.1.2	Rising awareness of infection control	56

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.2.1.3	Technological advancements	56
5.2.2	RESTRAINTS	56
5.2.2.1	High capital investments	56
5.2.2.2	Stringent regulatory compliance	57
5.2.3	OPPORTUNITIES	57
5.2.3.1	Growing healthcare investments in emerging economies	57
5.2.3.2	Adoption of single-use technologies	57
5.2.4	CHALLENGES	58
5.2.4.1	Speed and yield issues	58
5.3	PORTER'S FIVE FORCES ANALYSIS	59
5.3.1	THREAT OF NEW ENTRANTS	59
5.3.2	THREAT OF SUBSTITUTES	60
5.3.3	BARGAINING POWER OF SUPPLIERS	60
5.3.4	BARGAINING POWER OF BUYERS	60
5.3.5	INTENSITY OF COMPETITIVE RIVALRY	60
5.4	KEY STAKEHOLDERS AND BUYING CRITERIA	61
5.4.1	KEY STAKEHOLDERS IN BUYING PROCESS	61
5.4.2	QUALITY	62
5.4.3	SERVICE	62
5.5	MACROECONOMIC OUTLOOK	63
5.5.1	GDP TRENDS AND FORECASTS	63
5.6	IMPACT OF AI/GEN AI	66
5.7	VALUE CHAIN ANALYSIS	67
5.7.1	RAW MATERIAL SUPPLIERS	67
5.7.2	MANUFACTURERS	67
5.7.3	DISTRIBUTORS	67
5.7.4	END USERS	68
5.8	ECOSYSTEM ANALYSIS	68
5.9	CASE STUDY ANALYSIS	69
5.9.1	VALIDATING PEGASUS PRIME VIRUS REMOVAL FILTERS WITH PREFILTERS	69
5.9.2	ENHANCING DIALYSIS FILTRATION EFFICIENCY - FRESENIUS MEDICAL CARE	70
5.9.3	BLOOD FILTRATION FOR SEPSIS TREATMENT - CYTOSORBENTS CORPORATION	71
5.10	TARIFF AND REGULATORY LANDSCAPE	71
5.10.1	ENVIRONMENTAL REGULATIONS	71
5.10.2	NORTH AMERICA	71
5.10.3	ASIA PACIFIC	72
5.10.4	EUROPE	72
5.10.5	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	73
5.11	TECHNOLOGY ANALYSIS	75
5.11.1	KEY TECHNOLOGIES	75
5.11.1.1	Microfiltration	75
5.11.1.2	Ultrafiltration	75
5.11.1.3	Nanofiltration	75
5.11.2	COMPLEMENTARY TECHNOLOGIES	76
5.11.2.1	Single-use technology	76
5.11.3	ADJACENT TECHNOLOGIES	76
5.11.3.1	Chromatography	76

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.12 TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS 77
- 5.13 TRADE ANALYSIS 78
  - 5.13.1 EXPORT SCENARIO (HS CODE 8421) 78
  - 5.13.2 IMPORT SCENARIO (HS CODE 8421) 79
- 5.14 KEY CONFERENCES AND EVENTS, 2025-2026 80
- 5.15 PRICING ANALYSIS 82
  - 5.15.1 AVERAGE SELLING PRICE TREND, BY REGION, 2021-2023 82
  - 5.15.2 AVERAGE SELLING PRICE TREND, BY APPLICATION, 2021-2023 83
  - 5.15.3 AVERAGE SELLING PRICE TREND, BY END USER, 2021-2023 83
- 5.16 INVESTMENT AND FUNDING SCENARIO 84
- 5.17 PATENT ANALYSIS 84
  - 5.17.1 INTRODUCTION 84
  - 5.17.2 LEGAL STATUS OF PATENTS 86
  - 5.17.3 JURISDICTION ANALYSIS 86
- 6 MEDICAL FILTRATION MARKET, BY MATERIAL 87
  - 6.1 INTRODUCTION 88
  - 6.2 POLYSULFONE & POLYETHERSULFONE 90
    - 6.2.1 EXCELLENT MECHANICAL STRENGTH, THERMAL STABILITY, AND CHEMICAL RESISTANCE TO BOOST MARKET 90
  - 6.3 POLYVINYLIDENE FLUORIDE 90
    - 6.3.1 EXCEPTIONAL CHEMICAL RESISTANCE, THERMAL STABILITY, AND MECHANICAL STRENGTH TO DRIVE MARKET 90
  - 6.4 POLYTETRAFLUOROETHYLENE 91
    - 6.4.1 SUPERIOR FILTRATION PERFORMANCE IN CRITICAL MEDICAL APPLICATIONS TO PROPEL DEMAND 91
  - 6.5 POLYPROPYLENE 91
    - 6.5.1 EXCELLENT CHEMICAL RESISTANCE, DURABILITY, AND COST-EFFECTIVENESS TO DRIVE DEMAND 91
  - 6.6 OTHER MATERIALS 92
- 7 MEDICAL FILTRATION MARKET, BY PROCESS TECHNOLOGY 93
  - 7.1 INTRODUCTION 94
  - 7.2 ULTRAFILTRATION 96
    - 7.2.1 INCREASING PREVALENCE OF CHRONIC KIDNEY DISEASE AND RISING DEMAND FOR DIALYSIS TREATMENTS TO BOOST MARKET 96
  - 7.3 MICROFILTRATION 96
    - 7.3.1 GROWING USAGE IN STERILIZATION, WATER PURIFICATION, AND BIOPHARMACEUTICAL MANUFACTURING TO DRIVE DEMAND 96
  - 7.4 NANOFILTRATION 97
    - 7.4.1 LOW ENERGY CONSUMPTION AND HIGH FILTRATION EFFICIENCY TO SUPPORT MARKET GROWTH 97
  - 7.5 REVERSE OSMOSIS 97
    - 7.5.1 CRUCIAL ROLE IN ENSURING SAFETY OF WATER IN MEDICAL PROCEDURES TO BOOST MARKET 97
  - 7.6 GAS FILTRATION 98
    - 7.6.1 DELIVERY OF HIGH-QUALITY FILTERED AIR TO FUEL GROWTH 98
  - 7.7 OTHER PROCESS TECHNOLOGIES 98
- 8 MEDICAL FILTRATION MARKET, BY DESIGN/PROCESS 99
  - 8.1 INTRODUCTION 100
  - 8.2 SYSTEMS (RTU UNITS) 101
    - 8.2.1 CONVENIENCE, TIME-SAVING BENEFITS, AND ABILITY TO ENSURE CONSISTENT FILTRATION PERFORMANCE TO BOOST MARKET 101
  - 8.3 FILTRATION MODULES (CONSUMABLES) 102
    - 8.3.1 RISING PREVALENCE OF CHRONIC DISEASES TO DRIVE DEMAND FOR FILTRATION MODULES IN HEALTHCARE 102

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 8.4 OTHER DESIGNS/PROCESSES 102
- 9 MEDICAL FILTRATION MARKET, BY END USER 103
  - 9.1 INTRODUCTION 104
  - 9.2 HOSPITALS 106
    - 9.2.1 REQUIREMENT OF HIGH-PURITY WATER FOR WOUND CARE, SURGICAL PROCEDURES, STERILIZATION, AND DIALYSIS TO DRIVE MARKET 106
  - 9.3 DIAGNOSTIC CENTERS 106
    - 9.3.1 DEMAND FOR HIGH-PURITY WATER, FLUIDS, AND AIR TO ENSURE RELIABLE DIAGNOSTICS TO DRIVE GROWTH 106
  - 9.4 RESEARCH INSTITUTES 107
    - 9.4.1 INCREASE IN BIOLOGICAL STUDIES, AND MEDICAL RESEARCH TO BOOST MARKET 107
  - 9.5 OTHER END USERS 107
- ?
- 10 MEDICAL FILTRATION MARKET, BY APPLICATION 108
  - 10.1 INTRODUCTION 109
  - 10.2 DIALYSIS 111
    - 10.2.1 ACCURACY AND OPERATIONAL FILTRATION EFFICIENCY IN BLOOD PURIFICATION TO BOOST GROWTH 111
  - 10.3 DRUG DELIVERY 111
    - 10.3.1 PROVISION OF OPTIMAL CONDITIONS THROUGH CONSISTENT FLOW RATES AND MINIMUM PRESSURE DROPS TO FUEL MARKET GROWTH 111
  - 10.4 IV INFUSION & STERILE FILTRATION 112
    - 10.4.1 HIGH LEVEL OF PRECISION IN CONTAMINANT REMOVAL WHILE PRESERVING FLUID INTEGRITY TO DRIVE GROWTH 112
  - 10.5 ENDOSCOPY 112
    - 10.5.1 ENHANCEMENT OF SAFETY AND PERFORMANCE WITH ADVANCED FILTRATION TO BOOST MARKET 112
  - 10.6 STERILE PROCESSING 113
    - 10.6.1 GROWING DEMAND FOR SURGICAL INSTRUMENTS, ENDOSCOPES, AND REUSABLE MEDICAL DEVICES TO PROPEL MARKET 113
  - 10.7 BIO-ARTIFICIAL PROCESSES 113
    - 10.7.1 VITAL ROLE OF SOPHISTICATED FILTRATION SYSTEMS IN DEVELOPMENT AND FUNCTIONALITY OF BIO-ARTIFICIAL ORGANS TO BOOST MARKET 113
  - 10.8 OTHER APPLICATIONS 114
- 11 MEDICAL FILTRATION MARKET, BY REGION 115
  - 11.1 INTRODUCTION 116
  - 11.2 ASIA PACIFIC 118
    - 11.2.1 CHINA 127
      - 11.2.1.1 Strong economic growth and expanding healthcare sector to drive market 127
    - 11.2.2 JAPAN 129
      - 11.2.2.1 Growing aging population to propel market 129
    - 11.2.3 INDIA 131
      - 11.2.3.1 Increasing investments in healthcare sector to drive market 131
    - 11.2.4 SOUTH KOREA 133
      - 11.2.4.1 Rising demand for high-quality medical filtration solutions to drive market 133
    - 11.2.5 REST OF ASIA PACIFIC 135
  - 11.3 EUROPE 137
    - 11.3.1 GERMANY 146
      - 11.3.1.1 Economic strength, increasing healthcare expenditure, and rapidly aging population to drive market 146
      - 11.3.2 UK 148
        - 11.3.2.1 Rising geriatric population to support market growth 148

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

11.3.3	FRANCE	150
11.3.3.1	Aging population and enhancement of healthcare system to propel market	150
11.3.4	ITALY	151
11.3.4.1	Growing aging population to increase demand	151
11.3.5	SPAIN	153
11.3.5.1	Rising demand for advanced medical solutions to propel market	153
11.3.6	REST OF EUROPE	155
11.4	NORTH AMERICA	157
11.4.1	US	165
11.4.1.1	Stringent regulatory guidelines and increasing healthcare spending to boost market	165
11.4.2	CANADA	167
11.4.2.1	Growing aging population and significant government investments in healthcare infrastructure to drive market growth	167
11.4.3	MEXICO	169
11.4.3.1	Government initiatives and growth of healthcare sector to drive market	169
11.5	MIDDLE EAST & AFRICA	171
11.5.1	GCC COUNTRIES	179
11.5.1.1	Saudi Arabia	179
11.5.1.1.1	Economic growth, increasing government investments, and rising healthcare expenditures to drive market	179
11.5.1.2	Rest of GCC Countries	181
11.5.2	SOUTH AFRICA	183
11.5.2.1	Outbreaks of contagious diseases to drive demand	183
11.5.3	REST OF MIDDLE EAST & AFRICA	184
11.6	SOUTH AMERICA	186
11.6.1	BRAZIL	194
11.6.1.1	Rising healthcare investments and expanding medical infrastructure to propel growth	194
11.6.2	ARGENTINA	195
11.6.2.1	Increasing healthcare expenditure and enhancement of medical infrastructure to drive market	195
11.6.3	REST OF SOUTH AMERICA	197
12	COMPETITIVE LANDSCAPE	200
12.1	OVERVIEW	200
12.2	KEY PLAYER STRATEGIES/RIGHT TO WIN	200
12.3	REVENUE ANALYSIS, 2021-2023	202
12.4	MARKET SHARE ANALYSIS, 2023	203
12.5	COMPANY VALUATION AND FINANCIAL METRICS	205
12.6	PRODUCT COMPARISON	206
12.7	COMPANY EVALUATION MATRIX: KEY PLAYERS, 2023	207
12.7.1	STARS	207
12.7.2	EMERGING LEADERS	208
12.7.3	PERVASIVE PLAYERS	208
12.7.4	PARTICIPANTS	208
12.7.5	COMPANY FOOTPRINT: KEY PLAYERS, 2023	209
12.7.5.1	Region footprint	210
12.7.5.2	Material footprint	211
12.7.5.3	Process technology footprint	212
12.7.5.4	Design/Process footprint	213
12.7.5.5	Application footprint	214
12.7.5.6	End user footprint	215

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

12.8	COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2023	216
12.8.1	PROGRESSIVE COMPANIES	216
12.8.2	RESPONSIVE COMPANIES	216
12.8.3	DYNAMIC COMPANIES	216
12.8.4	STARTING BLOCKS	216
12.8.5	COMPETITIVE BENCHMARKING: STARTUPS/SMES, 2023	218
12.8.5.1	Detailed list of key startups/SMEs	218
12.8.5.2	Competitive benchmarking of key startups/SMEs	219
12.9	COMPETITIVE SCENARIO	220
12.9.1	PRODUCT LAUNCHES	220
12.9.2	DEALS	221
12.9.3	EXPANSIONS	222
12.9.4	OTHER DEVELOPMENTS	223
13	COMPANY PROFILES - MEDICAL FILTRATION EQUIPMENT PROVIDERS	224
13.1	KEY PLAYERS	224
13.1.1	MERCK KGAA	224
13.1.1.1	Business overview	224
13.1.1.2	Products/Solutions/Services offered	225
13.1.1.3	Recent developments	228
13.1.1.3.1	Expansions	228
13.1.1.4	MnM view	229
13.1.1.4.1	Right to win	229
13.1.1.4.2	Strategic choices	229
13.1.1.4.3	Weaknesses and competitive threats	230
13.1.2	3M (SOLVENTUM)	231
13.1.2.1	Business overview	231
13.1.2.2	Products/Solutions/Services offered	232
13.1.2.3	Recent developments	234
13.1.2.3.1	Other developments	234
13.1.2.4	MnM view	235
13.1.2.4.1	Right to win	235
13.1.2.4.2	Strategic choices	235
13.1.2.4.3	Weaknesses and competitive threats	235
13.1.3	DANAHER	236
13.1.3.1	Business overview	236
13.1.3.2	Products/Solutions/Services offered	237
13.1.3.3	Recent developments	240
13.1.3.3.1	Deals	240
13.1.3.3.2	Other developments	241
13.1.3.4	MnM view	241
13.1.3.4.1	Right to win	241
13.1.3.4.2	Strategic choices	241
13.1.3.4.3	Weaknesses and competitive threats	242
13.1.4	SARTORIUS AG	243
13.1.4.1	Business overview	243
13.1.4.2	Products/Solutions/Services offered	244
13.1.4.3	Recent developments	247

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 13.1.4.3.1 Product launches 247
- 13.1.4.4 MnM view 247
  - 13.1.4.4.1 Right to win 247
  - 13.1.4.4.2 Strategic choices 247
  - 13.1.4.4.3 Weaknesses and competitive threats 247
- 13.1.5 ASAHI KASEI CORPORATION 248
  - 13.1.5.1 Business overview 248
  - 13.1.5.2 Products/Solutions/Services offered 249
    - 13.1.5.3 MnM view 250
      - 13.1.5.3.1 Right to win 250
      - 13.1.5.3.2 Strategic choices 250
      - 13.1.5.3.3 Weaknesses and competitive threats 250
- 13.1.6 BAXTER 251
  - 13.1.6.1 Business overview 251
  - 13.1.6.2 Products/Solutions/Services offered 252
  - 13.1.6.3 Recent developments 254
    - 13.1.6.3.1 Deals 254
    - 13.1.6.4 MnM view 255
      - 13.1.6.4.1 Right to win 255
      - 13.1.6.4.2 Strategic choices 255
      - 13.1.6.4.3 Weaknesses and competitive threats 255
- 13.1.7 THERMO FISHER SCIENTIFIC INC. 256
  - 13.1.7.1 Business overview 256
  - 13.1.7.2 Products/Solutions/Services offered 257
  - 13.1.7.3 MnM view 260
- ?
- 13.1.8 VEOLIA 261
  - 13.1.8.1 Business overview 261
  - 13.1.8.2 Products/Solutions/Services offered 262
  - 13.1.8.3 Recent developments 266
    - 13.1.8.3.1 Product launches 266
    - 13.1.8.4 MnM view 267
      - 13.1.8.4.1 Right to win 267
      - 13.1.8.4.2 Strategic choices 267
      - 13.1.8.4.3 Weaknesses and competitive threats 267
- 13.1.9 DONALDSON COMPANY, INC. 268
  - 13.1.9.1 Business overview 268
  - 13.1.9.2 Products/Solutions/Services offered 269
  - 13.1.9.3 Recent developments 270
    - 13.1.9.3.1 Expansions 270
  - 13.1.9.4 MnM view 270
- 13.1.10 PARKER HANNIFIN CORP 271
  - 13.1.10.1 Business overview 271
  - 13.1.10.2 Products/Solutions/Services offered 272
  - 13.1.10.3 MnM view 273
- 13.1.11 ENTEGRIS 274
  - 13.1.11.1 Business overview 274

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 13.1.11.2 Products/Solutions/Services offered 275
- 13.1.11.3 MnM view 275
- 13.1.12 MANN+HUMMEL 276
- 13.1.12.1 Business overview 276
- 13.1.12.2 Products/Solutions/Services offered 277
- 13.1.12.3 MnM view 278
- 13.2 OTHER PLAYERS 279
- 13.2.1 CORNING INCORPORATED 279
- 13.2.2 CRITICAL PROCESS FILTRATION, INC. 280
- 13.2.3 COBETTER 281
- 13.2.4 GRAVER TECHNOLOGIES 282
- 13.2.5 ERTELALSOP 284
- 13.2.6 KASAG SWISS AG 285
- 13.2.7 FILTROX AG 286
- 13.2.8 MEMBRANE SOLUTIONS 287
- 13.2.9 COLE-PARMER INSTRUMENT COMPANY, LLC 288
- 13.2.10 MEISSNER FILTRATION PRODUCTS, INC. 289
- 13.2.11 MEDICAL FILTRATION SOLUTIONS LTD. 290
- 13.2.12 SEFAR AG 291
- 13.2.13 WALKER FILTRATION 292
- 13.2.14 SAINT-GOBAIN 293
- 14 COMPANY PROFILES - AUTOMATED ENDOSCOPE REPROCESSOR PROVIDERS 294
- 14.1 KEY PLAYERS 294
- 14.1.1 STERIS 294
- 14.1.1.1 Business overview 294
- 14.1.1.2 Products/Solutions/Services offered 295
- 14.1.1.3 Recent developments 297
- 14.1.1.3.1 Deals 297
- 14.1.1.4 MnM view 297
- 14.1.1.4.1 Right to win 297
- 14.1.1.4.2 Strategic choices 298
- 14.1.1.4.3 Weaknesses and competitive threats 298
- 14.1.2 FORTIVE 299
- 14.1.2.1 Business overview 299
- 14.1.2.2 Products/Solutions/Services offered 300
- 14.1.2.3 Recent developments 301
- 14.1.2.3.1 Deals 301
- 14.1.2.4 MnM view 301
- 14.1.2.4.1 Right to win 301
- 14.1.2.4.2 Strategic choices 302
- 14.1.2.4.3 Weaknesses and competitive threats 302
- 14.1.3 OLYMPUS CORPORATION 303
- 14.1.3.1 Business overview 303
- 14.1.3.2 Products/Solutions/Services offered 304
- 14.1.3.3 Recent developments 305
- 14.1.3.3.1 Product launches 305
- 14.1.3.4 MnM view 305

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 14.1.3.4.1 Right to win 305
- 14.1.3.4.2 Strategic choices 305
- 14.1.3.4.3 Weaknesses and competitive threats 305
- 14.1.4 ECOLAB 306
- 14.1.4.1 Business overview 306
- 14.1.4.2 Products/Solutions/Services offered 307
- 14.1.4.3 Recent developments 308
- 14.1.4.3.1 Product launches 308
- 14.1.4.4 MnM view 308
- 14.1.4.4.1 Right to win 308
- 14.1.4.4.2 Strategic choices 308
- 14.1.4.4.3 Weaknesses and competitive threats 309
- ?
- 14.1.5 GETINGE 310
- 14.1.5.1 Business overview 310
- 14.1.5.2 Products/Solutions/Services offered 311
- 14.1.5.3 Recent developments 312
- 14.1.5.3.1 Expansions 312
- 14.1.5.4 MnM view 312
- 14.1.5.4.1 Right to win 312
- 14.1.5.4.2 Strategic choices 312
- 14.1.5.4.3 Weaknesses and competitive threats 313
- 14.1.6 STEELCOBELIMED (METALL ZUG GROUP) 314
- 14.1.6.1 Business overview 314
- 14.1.6.2 Products/Solutions/Services offered 315
- 14.1.6.3 Recent developments 316
- 14.1.6.3.1 Deals 316
- 14.1.6.4 MnM view 316
- 14.1.7 ENDO-TECHNIK W. GRIESAT (CREO) 317
- 14.1.7.1 Business overview 317
- 14.1.7.2 Products/Solutions/Services offered 317
- 14.1.7.3 MnM view 318
- 14.1.8 WASSENBURG MEDICAL B.V. (HOYA CORPORATION) 319
- 14.1.8.1 Business overview 319
- 14.1.8.2 Products/Solutions/Services offered 319
- 14.1.8.3 Recent developments 320
- 14.1.8.3.1 Deals 320
- 15 COMPANY PROFILES - DIALYSIS EQUIPMENT PROVIDERS 321
- 15.1 KEY PLAYERS 321
- 15.1.1 FRESENIUS MEDICAL CARE AG 321
- 15.1.1.1 Business overview 321
- 15.1.1.2 Products/Solutions/Services offered 322
- 15.1.1.3 Recent developments 323
- 15.1.1.3.1 Product launches 323
- 15.1.1.3.2 Deals 324
- 15.1.1.4 MnM view 324
- 15.1.1.4.1 Right to win 324

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

15.1.1.4.2	Strategic choices	325
15.1.1.4.3	Weaknesses and competitive threats	325
15.1.2	BAXTER	326
15.1.2.1	Business overview	326
15.1.2.2	Products/Solutions/Services offered	327
15.1.2.3	Recent developments	328
15.1.2.3.1	Deals	328
15.1.2.4	MnM view	329
15.1.2.4.1	Right to win	329
15.1.2.4.2	Strategic choices	329
15.1.2.4.3	Weaknesses and competitive threats	329
15.1.3	DAVITA INC.	330
15.1.3.1	Business overview	330
15.1.3.2	Products/Solutions/Services offered	331
15.1.3.3	Recent developments	331
15.1.3.3.1	Deals	331
15.1.3.3.2	Expansions	332
15.1.3.4	MnM view	332
15.1.3.4.1	Right to win	332
15.1.3.4.2	Strategic choices	332
15.1.3.4.3	Weaknesses and competitive threats	332
15.1.4	NIKKISO CO., LTD.	333
15.1.4.1	Business overview	333
15.1.4.2	Products/Solutions/Services offered	334
15.1.4.3	Recent developments	335
15.1.4.3.1	Deals	335
15.1.4.4	MnM view	336
15.1.4.4.1	Right to win	336
15.1.4.4.2	Strategic choices	336
15.1.4.4.3	Weaknesses and competitive threats	336
15.1.5	B. BRAUN SE	337
15.1.5.1	Business overview	337
15.1.5.2	Products/Solutions/Services offered	338
15.1.5.3	Recent developments	339
15.1.5.3.1	Product launches	339
15.1.5.3.2	Expansions	339
15.1.5.4	MnM view	340
15.1.5.4.1	Right to win	340
15.1.5.4.2	Strategic choices	340
15.1.5.4.3	Weaknesses and competitive threats	340
15.1.6	NIPRO	341
15.1.6.1	Business overview	341
15.1.6.2	Products/Solutions/Services offered	342
15.1.6.3	Recent developments	343
15.1.6.3.1	Product launches	343
15.1.7	TORAY MEDICAL CO., LTD.	344
15.1.7.1	Business overview	344

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

15.1.7.2 Products/Solutions/Services offered 345

?

15.1.8 MEDIONICS 346

15.1.8.1 Business overview 346

15.1.8.2 Products/Solutions/Services offered 346

16 APPENDIX 347

16.1 DISCUSSION GUIDE 347

16.2 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL 350

16.3 CUSTOMIZATION OPTIONS 352

16.4 RELATED REPORTS 352

16.5 AUTHOR DETAILS 353

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

**Medical Filtration Market by Material (Polyethersulfone; Polyvinylidene fluoride), Applications (Dialysis; Sterile Processing), Process Technology (Ultrafiltration; Microfiltration), Design/Process, End-Users & Region - Global Forecast to 2030**

Market Report | 2025-02-13 | 354 pages | MarketsandMarkets

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Date

2026-03-02

Signature

A large, empty rectangular box intended for a signature.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

[www.scotts-international.com](http://www.scotts-international.com)