

## **Ultraviolet Disinfection Equipment - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-04-28 | 128 pages | Mordor Intelligence

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### **Report description:**

The Ultraviolet Disinfection Equipment Market size is estimated at USD 6.36 billion in 2025, and is expected to reach USD 12.10 billion by 2030, at a CAGR of 13.72% during the forecast period (2025-2030).

UV disinfection equipment harnesses the power of ultraviolet (UV-C) light to neutralize harmful microorganisms, including bacteria, viruses, and protozoa. By targeting and breaking down the DNA or RNA of these microorganisms, the equipment renders them unable to reproduce or cause infections. Key components of UV disinfection equipment encompass UV lamps, UV reactors, portable UV devices, and integrated UV systems. These tools find applications in surface disinfection (spanning hospitals, food processing units, and laboratories), water and wastewater treatment, and air purification, among others.

### **Key Highlights**

- Heightened investments in expanding wastewater treatment plants and the rising incidence of Hospital-Acquired Infections (HAIs) are poised to drive market growth in the coming years. Additionally, the growing trend of using reclaimed water for landscape irrigation and urinals underscores the escalating demand for advanced disinfection technologies.
- Technological innovation has transformed UV disinfection equipment, improving its efficiency, accessibility, and versatility across industries. UV-C LED technology is gradually replacing traditional mercury-based UV lamps. UV-C LEDs provide longer lifespans, reduced energy consumption, and instant start-up without warm-up time. Current UV systems incorporate enhanced safety features, including automatic shut-off mechanisms to prevent accidental UV-C light exposure.
- Heightened awareness of hygiene, especially post-COVID-19, has driven a surge in demand for ultraviolet (UV) disinfection equipment. With a growing emphasis on eradicating bacteria, viruses, and pathogens, UV disinfection stands out for its chemical-free efficacy in neutralizing harmful microorganisms.
- Chronic exposure to such polluted water can result in severe health issues, including cancer and skin diseases. Moreover, this

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contaminated water becomes a breeding ground for harmful microorganisms, leading to waterborne illnesses like cholera and typhoid. Given these challenges, India's demand for UV disinfection solutions is poised to rise.

- Raw material availability fluctuations significantly challenge the UV disinfection equipment market, affecting production, supply chains, costs, and overall dynamics. For example, UV lamps depend heavily on high-purity quartz glass, especially low-pressure mercury and amalgam types. Any fluctuation in the availability or quality of quartz can disrupt lamp production. Additionally, aluminum and stainless steel, used for housing UV disinfection equipment, face price volatility driven by global demand, supply constraints, and mining or refining disruptions.

## UV Disinfection Equipment Market Trends

### Municipal Authorities to be the Largest End Users

- The municipal authorities worldwide are witnessing increased investment in water and wastewater projects. Governments globally have implemented stringent regulations for safe drinking water and wastewater discharge, such as U.S. EPA regulations for drinking water treatment and EU directives for water quality standards. These regulations drive the demand for large-scale UV disinfection systems.
- According to official sources, Thames Water, based in Reading, Berkshire, operated 353 sewage treatment works for the year ending March 31, 2023. Additionally, United Utilities treated 3.1bn liters of sewage daily. This increased volume of sewage water treatment creates demand for UV systems to eliminate harmful microorganisms like bacteria, viruses, and parasites.
- Furthermore, in April 2023, the Oklahoma Water Resources Board (OWRB) approved a USD 17.25 million loan for the Davis Municipal Authority to enhance its wastewater infrastructure. Construction of upgrades and improvements to the system will be financed by the Oklahoma Clean Water State Revolving Fund (CWSRF), which includes upgrading the wastewater treatment plant including a new headworks facility, aeromod treatment system, UV disinfection, solids dewatering facility, and an operations building
- In this way, municipal drinking water and wastewater treatment facilities have begun switching from traditional technology to UV disinfection systems because it is more affordable, secure, and environmentally beneficial. This growth in the number of projects and adoption of UV disinfection systems is expected to drive demand for UV disinfection equipment.
- Rapid industrialization in emerging nations has significantly contributed to increased water pollution. Concurrently, the growing population has heightened the demand for clean and safe drinking water, which is expected to drive the demand for these products. In developed nations, the municipal segment dominates the global UV disinfection equipment market, primarily due to the increasing adoption of advanced technologies in water and wastewater treatment facilities.
- Additionally, UV disinfection serves as an essential solution in the tertiary treatment of municipal wastewater, effectively addressing water scarcity and the increasing costs associated with fresh water. Specialized UV systems designed for municipal wastewater ensure thorough disinfection, facilitating the reuse of treated wastewater for non-potable applications such as flushing and landscaping. These advantages are further driving the adoption of UV disinfection systems and supporting market growth.

### North America Holds Largest Market Share

- North America is a key region in the global ultraviolet disinfection equipment market. The region has established itself as an early adopter and significant investor in this technology. Major factors driving the regional market growth include substantial investments in medical robotics and the presence of leading innovators in the field.
- Regional governments actively support and promote advanced robotic technologies, including disinfectant robots, across various industries. The increasing involvement of local research organizations and scientific institutions in Ultraviolet Disinfection

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Equipment innovation further accelerates advancements in the global market.

- According to the National Institute for Occupational Safety and Health (NIOSH), healthcare workers in the United States face the highest rates of non-fatal occupational injuries and illnesses. Renowned institutions such as the Massachusetts Institute of Technology (MIT) and the University of Michigan are at the forefront of developing compact robots tailored for the medical sector.
- The United States has been a leader in adopting autonomous technologies for disinfection. Growing concerns over Hospital-Acquired Infections (HAIs) have driven the early adoption of advanced Ultraviolet Disinfection Equipment.
- Canada, leveraging its advanced manufacturing capabilities, is positioning itself as a global leader in the development and production of large-scale disinfecting equipment. The Canadian Patient Safety Institute reports that approximately 8,000 Canadians die from HAIs annually, while 220,000 others are infected. Following the COVID-19 pandemic, Canada increased its investments in disinfectant solutions, creating significant opportunities for market vendors.
- Additionally, the development of innovative UV light disinfection equipment-characterized by cost-effectiveness, high functionality, eco-friendliness, and ease of operation-is expected to drive market growth. Mexico is also projected to experience substantial growth due to increasing awareness among consumers and government bodies about the health risks associated with traditional chemical-based disinfectants.
- Furthermore, the ease of installation, low maintenance requirements, and reduced operating costs are anticipated to support market expansion. Such instances are boosting the market's development in the region.

### UV Disinfection Equipment Industry Overview

The competitive rivalry in the market is expected to remain high during the forecasted period. Established players dominate the fiercely competitive market, including Xylem Inc., Trojan Technologies, Halma PLC, and Severn Trent Services. These companies set their products apart through technology, performance, and pricing.

These companies pour significant resources into marketing and sales to capture a larger market share. The industry also sees a wave of consolidation, primarily through mergers and acquisitions. Moreover, new entrants in UV disinfection equipment bring innovation and new ways of doing things, putting pressure on companies through lower pricing strategies, reducing costs, and providing new value propositions to customers.?

#### Additional Benefits:

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

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