

MARKET REPORT

An aerial photograph of a city skyline, likely London, featuring prominent buildings like the Gherkin and the Shard. The image is overlaid with a semi-transparent white box containing text. The bottom right corner of the white box is cut off by a dark blue geometric shape.

Sterilization Technology Market by Offering Type (Devices, Consumables, Services), by Application (Medical Devices Sterilization, Pharmaceutical Sterilization), by End User (Pharmaceutical & Biotechnology Companies, Hospitals, Medical Devices Companies, Ambulatory Surgical Centers & Clinics, Academic and Research Organizations), by Geography (U.S., Canada, Germany, U.K., France, Japan, China, Indi

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The boost in demand of sterilization processes is due to the increasing prevalence of healthcare associated infections (HAIs), growing demand for sterilized pharmaceutical products, expanding demand for less invasive surgical procedures, and growing aging population.

Insights on market segments

In terms of products & services, the sterilization technology market has been segmented into devices, consumables and services. The devices market occupied the largest share in the global market in 2016, mainly attributable to the increasing number of HAIs, growing number of hospitals, rising pharmaceutical, biotechnologies and medical device industries. The vendors in this market offer two major types of sterilization services, contract sterilization and sterilization validation, of which contract sterilization services occupy the larger share in the market.

There are various sterilization technology devices available in the market that are based on steam, low temperature, heat, radiation, filtration, liquid, and ultrasound. Among different type of devices, heat sterilizers are expected to register the fastest growth of 9.3%, in the sterilization technology market during the forecast period. Its growth is due to the increasing adoption of heat sterilizers in the instrument reprocessing operations, pharmaceutical and biotechnology manufacturing units for sterilization of bulk product for sterilizing products that are moisture sensitive and are medicinal in nature and cannot be sterilized with steam.

On the basis of application, the sterilization technology industry is segmented into medical devices and pharmaceutical sterilization. Medical devices sterilization projected the larger share of 59.0% in 2016 in the global revenue, attributed to growing aging population and increasing number of surgeries, that have increased the need of advanced invasive devices, boosting the demand of sterilization technology operations for complex medical devices.

Pharmaceutical and biotechnology companies are the largest end user in the sterilization technology market and are expected to generate a revenue of \$3.2 million by 2023. The growing number of pharmaceutical and biotechnology companies and increasing production of pharmaceutical and biotechnology products is boosting the growth of this segment. Other than these companies, hospitals, medical device companies, ambulatory surgical centers and clinics, and academic and research organizations are the other key end users in the market.

Asia-Pacific is projected to register the fastest growth in the market

The Asia-Pacific sterilization technology market has been experiencing significant growth due to increasing aging population, rising healthcare expenditure, growing pharmaceutical industry in the region, high pollution levels, and growing medical tourism. The market in the region will witness 10.6% CAGR during the forecast period. According to the World Bank, the healthcare expenditure of South Asia was 3.9% of its total GDP in 2000, which increased to 4.4% in 2014. The growing healthcare infrastructure in Asia-Pacific is creating huge revenue generation opportunities for the medical device manufacturers in the region to adopt for sterilization products and services.

Key competitors are introducing new indicator systems in the market

Globally, the key providers in the sterilization technology industry are launching new products to gain a larger market share. In June 2017, Advanced Sterilization Products (ASP), Ethicon, Inc. received the USFDA clearance for its 30-minute STERRAD VELOCITY BI system. The system has reduced the result time from several hours to 30 minutes, and this new enhancement to the company's complete sterile ecosystem gives hospitals the opportunity to raise their standard of care by running a BI in every cycle, every day. It minimizes the need for manual documentation and thereby reducing the potential for human error.

Some of the other key players operating in the sterilization technology market include STERIS plc, Getinge AB, Belimed AG, Cantel Medical Corp., MATACHANA GROUP, Anderson Products, Inc., B. Braun Melsungen AG, 3M Company, and Sterigenics International, LLC.

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