

# MARKET REPORT



## Infection Control (Disinfection & Sterilization) Global Market - Forecast to 2022

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# Infection Control (Disinfection & Sterilization) Global Market - Forecast to 2022

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Healthcare associated infections which mainly includes hospital or community acquired infections are persisting factor in each and every healthcare system. Increase in occurrence of hospital acquired infections and advancements in sterilization and disinfection technologies are making the infection prevention and control market promising. For reduction of hospital acquired infections, infection prevention control organizations are applying epidemiologic and scientific principles and statistic analysis. Along with this, from the past decade there is a progressive refinement in sterilizing technologies from manually operated equipment to modern microprocessor controlled automatic machines. Plasma sterilization and use of electrostatics for surface disinfection are emerging and promising technologies in sterilizers and disinfectant market. Infection control products are used in a wide variety of applications like in healthcare settings, food and beverage industries, drug discovery, dental clinics and cosmetics. In recent times there is an advancement in sterilizing surgical tools in hospital settings by using robotic surgical tool sterilization process and thus promoting sufficient process of sterilization.

The global infection control market is expected to grow at a single digit high CAGR% to reach \$22,582 million by 2022. Infection control market is mainly classified into products and end-users.

The infection control market by products is segmented into disinfection and sterilization. The disinfection market is further sub-segmented into the disinfectors which include washers, flushers and UV rays disinfectors, the endoscope reprocessors, the disinfectants and personal protective equipments (PPE). The disinfectants are divided by product type and EPA classification. Hand, skin, instrument and surface disinfectants are categorized under product type while low-level, intermediate level and high level disinfectants are divided under EPA classification segment. The personal protective equipment includes gloves and foot covers, surgical masks and respirators, surgical drapes and gowns, disinfectant wipes and others (protective eye-wears and sterilization wraps).

The infection control by sterilization is classified by methods and services. The sterilization market by method involves the heat sterilization which further includes wet/moist heat sterilization and dry sterilization, the low temperature sterilization including ethylene oxide sterilization (ETO), vaporized hydrogen peroxide (VHP), hydrogen peroxide gas plasma, peracetic acid, ozone gas, formaldehyde sterilization and chlorine dioxide, the filtration sterilization and the radiation sterilization contains ionizing and non-ionizing radiation. However the sterilization market by services is segmented into in-house sterilization services and contract sterilization services. Both the in-house and contract sterilization provides ethylene oxide sterilization, gamma sterilization, e-beam sterilization and other sterilization services.

The end-users of infection control market are pharmaceuticals, biotechnology, hospitals, research laboratories and others. The hospital end-user segment consists of dental clinics, nursing centres and ambulatory services, while the other end-users of this market are cosmetics, food and beverage and veterinary.

Among the products, disinfection segment holds the largest share and sterilization is the fastest growing segment from 2015 to 2022. By end-users, hospital is the largest segment and is the fastest segment from 2015 to 2022. Geographical wise, North America is the largest market, with a share of 39.5% followed by Europe, Asia and Rest of the World. The Asia region is the fastest growing region from 2015 to 2022 suggesting an array of opportunities for growth and likely to be getting into the eyes of new investors in the Infection prevention and control market. Growth in the Asia-Pacific market is attributed to implementation of practical evidence based, low cost and simple preventive strategies, obtaining fund research projects via ICMR, DBT and state agencies and training infection control professionals and nurses.

The Infection Control market is expected to grow at a single digit high CAGR during 2015 to 2022. The factors driving the growth of this market are increase in aging population, rising occurrence of hospital acquired infections, increase in number of surgeries performed, proper maintenance of hygiene among hospital staff and increasing awareness among people. While rise in trend for e-beam radiation sterilization through service sterilization industry and growth of single use technology products in developing countries are some of the

opportunities that are propelling the growth of the market. However stringent regulations and economic downturn and saturation are hampering the growth of the market.

The Infection Control global market is a highly fragmented market and all the existing players in this market are involved in developing new and advanced products to maintain their market shares. Some of the key players of the infection control market are 3M Company (U.S.), Advanced Sterilization Products (U.S.), Ansell Limited (Australia), Belimed (Switzerland), Cantel Medical (U.S.), Getinge Group (Sweden), Halyard Health (U.S.), Hartmann Group (Germany), Sterigenics International, Inc., (U.S.) and Steris Corporation (U.S.).

The report provides an in depth market analysis of the above mentioned segments across the following regions:

- North America
- Europe
- Asia-Pacific
- Rest of the World (RoW)

## Additional Details

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