

## Report Information

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# UV Disinfection Equipment Market Research Report—Global Forecast till 2027

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## Description:

### UV Disinfection Equipment Market Size and Overview

Globally, the size of the UV Disinfection Equipment Market is expected to reach USD 9,738.44 Million by 2027 at a CAGR of 12.5% driven by, UV disinfection equipment is known to kill superbugs such as MRSA, VRE, K pneumonia, and C difficile and are helping hospitals to reduce the transmission of superbugs

Since the mid-twentieth century, UV radiation has been utilized for sterilization and disinfection. With developments in technology, particularly in UV bulbs, their extended lifespan (thousands of hours) and reduced size (e.g., UV LED versus classic UV bulbs) have widened the scope of applications. Water, air, fruits, vegetables, surgical utensils, tablet computers, toys, and a variety of surfaces are all disinfected with it. Ultraviolet disinfection employs short-wavelength ultraviolet light to kill bacteria by destroying their nucleic acids and disrupting their DNA. Microorganisms are rendered inactive as a result of the process and are unable to conduct essential biological tasks. Ultraviolet disinfection equipment disinfects water by putting LEDs, lamps, or bulbs in close proximity to it. The COVID-19 pandemic has had an influence on the UV disinfection equipment market, resulting in higher shipments of UV disinfection equipment and related components, as well as higher revenues. This is projected to expand in the future years as the need for surface disinfection rises owing to increased health concerns. The increasing usage of UV disinfection equipment for cleaning hospitals and medical institutions is one of the primary factors impacting the growth of the UV disinfection equipment market.

The global UV disinfection equipment market is projected to be valued at USD 9,738.44 Million by 2027, growing at a significant rate of 12.5% CAGR during the forecast period from 2021 to 2027. The global UV disinfection equipment market has been segmented based on components, deployment, application, end user and region. Based on components the market is segmented into UV lamps, reactor chambers, quartz sleeves, controller units, and others. Based on deployment, the market is segmented into portable, wall-mounted, and others. The application segment is divided into on water and wastewater, disinfection process, water disinfection, air disinfection, surface disinfection, food & beverage disinfection, and others. The end user segment is divided into residential, commercial, industrial, and municipal. The geographic analysis of UV disinfection equipment has been conducted for North America (the US, Canada, and Mexico), Europe (the UK, Germany, France, Italy, and the rest of Europe), Asia-Pacific (China, Japan, India, and the rest of Asia-Pacific), and the rest of the world (the Middle East & Africa and South America).

### UV Disinfection Equipment Market COVID-19 Analysis

Duty sensors are used for permanent measurements in the UV Disinfection equipment's. These sensors are designed for permanent measurements of the germicidal UV-irradiation of a source or at the position of the goods to be disinfected. COVID-19 has had an impact on the sector, particularly due labor shortages, financial stress, and disruptions to the supply chain. The COVID-19 pandemic has caused many dislocations to the sensors industry. Thus, the manufacturers of UV disinfection equipment faced scarcity in the supply of sensors during the mid-term of 220. However, as the pandemic eased and mobility increased, supply activities picked up which will ease many of the problems faced during the crisis.

The UV disinfection equipment providers will experience a spike in demand due to the current COVID-19 pandemic. The impact of the COVID 19 pandemic is also expected to cause an increase in research and development on UV disinfection equipment to control the spread of the disease. Manufacturers of these systems will experience a rise in orders due to rising emphasis of surface treatment from industrial and commercial sectors. Particularly, the demand from the healthcare sector is expected to rise significantly due to the growing number of hospitalizations and due to the nature of the Corona virus. Companies overseeing new product launches will also act steadily owing to the opportunities in the market. The impact of both trends will prove operationally beneficial to suppliers. Moreover, the market is also likely to experience steady growth over the long run. However, there are delays in receiving raw materials from suppliers, primarily located in China and other Southeast Asian countries. These issues are taking a toll on manufacturers situated around the globe.

Supply chains for the UV disinfection equipment Market are also impacted. Multiple national lockdowns continue to slow or even temporarily stop the flow of raw materials and finished goods, disrupting manufacturing as a result. However, it has accelerated and magnified problems that already existed in the supply chain. Companies across the world are focusing on improving their supply chain strategies to become more resilient, collaborative, and networked with customers, suppliers, and other stakeholders. Moreover, companies will increase investment in supply chain technologies like AI and robotic process automation while retraining workers.

### UV Disinfection Equipment Market Dynamics

The growth of the global UV Disinfection Equipment market is driven by various factors, such as Extensive use of UV disinfection equipment for disinfecting hospitals and medical facilities and Inactivation of harmful bacteria in water. The market's growth is likely to be hindered by the Low costs of conventional disinfectants. However, rising concerns for surface disinfection will bring opportunities to the market.

## Market Drivers

- **Extensive use of UV disinfection equipment for disinfecting hospitals and medical facilities**

Healthcare Acquired Infections (HAIs) are more common than most people realize with 1 in 25 people developing an infection directly related to their hospital stay, according to the Office of Disease Prevention and Health Promotion. HAIs cost billions of dollars to treat patients and cause nearly 100,000 deaths annually in the U.S. Thus, healthcare organizations and hospital administrators are taking notice of the effective and cost saving benefits of using UV light to disinfect hospitals with wall mounted units or mobile UVC disinfection systems. Moreover, UVC robots are becoming more popular in hospitals as they roam from room to room to disinfect in between patients and wall mounted units in restrooms can be set to automatically engage when the door closes. UV disinfection lamps are also used in the heating and cooling systems of hospitals to purify and disinfect the air in hospitals where people are more vulnerable to illness. A study published by the American Journal of Infection Control shows that UV light disinfection in hospitals eliminates up to 97.7% of harmful pathogens in operating rooms. In addition, UV disinfection equipment is known to kill superbugs such as MRSA, VRE, K pneumonia and C difficile and are helping hospitals to reduce the transmission of superbugs that linger in hospital rooms causing new infections. Quality UV sterilization lamps are proven to kill K pneumonia and VRE in seconds, MRSA in less than 5 minutes of exposure at 10 feet away and C difficile in less than 15 minutes at a 10 ft. distance. In addition, Ultraviolet disinfection equipment has powerful germicidal properties in the UVC range, specifically at 254nm wavelength. Moreover, with the anticipated rise in the number of hospitalizations due to the rising geriatric population, UV disinfection equipment will find increased use in hospitals and medical facilities to many viruses and bacteria.

## Market Opportunity

- **Scope for growth in developing nations**

Surface disinfection in healthcare environment, food and beverage industries and also in domiciliary environment plays a central role on infection inhibition and control strategies adopted in response to transmissible disease outbreaks. The COVID-19 pandemic has called for the increased use of disinfectants worldwide in public facilities, transportation, hospitals, nursing homes, wastewater treatment facilities, and even common households to mitigate virus burden. UV light is proven to provide effective surface sterilization, eliminating even drug-resistant superbugs and novel corona virus with high efficacy. Thus, the COVID-19 pandemic has led to increased demand for disinfection and demand for all types of disinfection products, including UV disinfection equipment.

## Market Restraints

- **Low costs of conventional disinfectants**

Traditionally, the use of chlorine gas was the most common method of wastewater disinfection. Moreover, chlorine gas itself is relatively inexpensive although it is a highly toxic chemical. Shock chlorination is another popular treatment for disinfecting a well. The treatment commonly utilizes a sodium hypochlorite, strong chlorine bleach, solution within the water well and throughout the distribution piping. Improved hydrogen peroxide-based liquid surface disinfectants and a combination product containing peracetic acid and hydrogen peroxide are effective alternatives to disinfectants currently in widespread use. These products are cheaper than UV systems. However, as UV disinfection equipment is gaining recognition as a safer and more cost-effective way to disinfect for commercial, industrial, and municipal applications, the factor is expected to have low impact on the market growth over the forecast period.

## Value Chain Analysis

The UV disinfection equipment market supply chain has evolved from a conventional approach to highly efficient supply chain processes. The supply chain includes the stages of design & development, raw material supply, UV Disinfection Equipment manufacture/assembly, and end use.

## UV Disinfection Equipment Market Segmentation

The UV disinfection equipment market has been segmented based on component, deployment, application, End User and region.

Based on component, the global UV Disinfection Equipment market has been segmented into UV Lamps, Reactor Chambers, Quartz Sleeves, Controller Units, Others.

By deployment, the UV Disinfection Equipment market has been segmented into Portable, Wall-Mounted, Others.

Based on Application, the UV Disinfection Equipment market has been segmented into Water and Wastewater, Disinfection Process, Water Disinfection, Air Disinfection, Surface Disinfection, Food & Beverage Disinfection, Others.

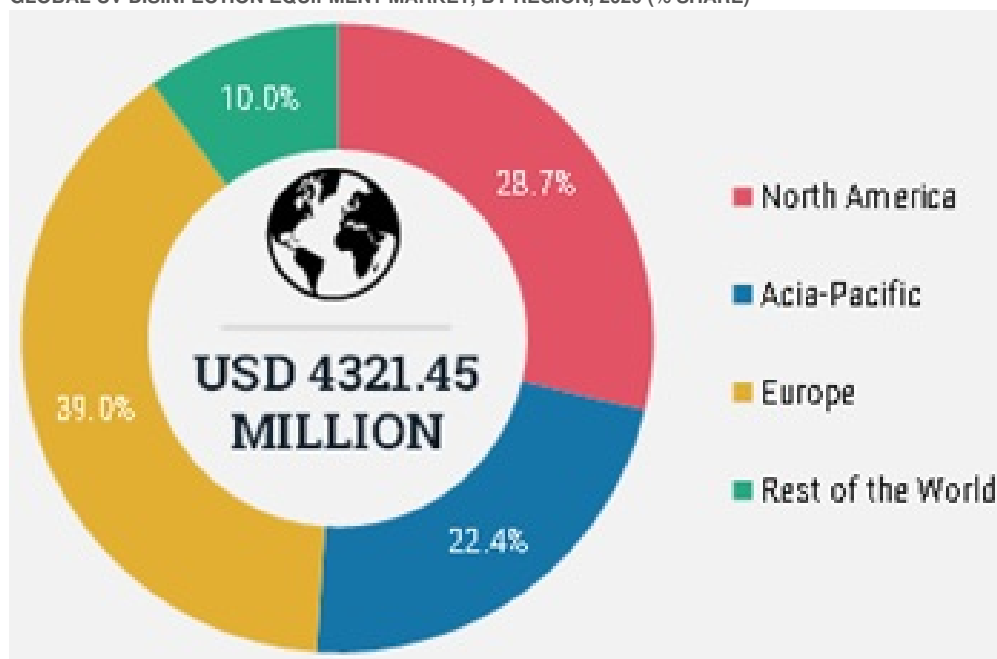
Based on End User, the UV Disinfection Equipment market has been segmented into Residential, Commercial, Industrial, Municipal.

## UV Disinfection Equipment Market Regional Analysis

Globally, the UV Disinfection Equipment market has been categorized into five different regions—North America, Europe, Asia-Pacific, Middle East & Africa, and South America. The North America UV disinfection equipment market size was valued at USD 1,239 million in 2020, and is projected to reach USD 2806 million by 2027, growing at a CAGR of 12.6% from 2021 to 2027. Furthermore, US held 78.77% of the overall market and the demand for UV disinfection equipment in the US is expected to rise annually. Furthermore, the US market will

also be supported by sustained efforts to decrease water consumption through the treatment and reuse of wastewater and by rising water treatment standards in industrial markets such as manufacturing, resource extraction, and power generation. Moreover, the adoption of UV technology for disinfection is growing as UV equipment's allow users to decrease reliance on potentially hazardous solutions such as Chlorine used in water treatment.

GLOBAL UV DISINFECTION EQUIPMENT MARKET, BY REGION, 2020 (% SHARE)



Source: Industry Expert, Secondary Research, and MRFR Analysis

### Asia Pacific Region to Bolster the UV Disinfection Equipment Market

Asia Pacific Water Treatment Chemicals market is the largest market in the global UV disinfection equipment market. The market is projected to reach USD 3,955 million by 2027, growing at a rate of 12.6% CAGR. Among the Asia-Pacific countries, China is the largest contributor to the UV disinfection equipment market in the Asia Pacific region. The market for water treatment chemicals in China is motivated by many variables, such as growing demand for industrial wastewater treatment alternatives, adverse climatic circumstances and decreased saline intrusion content of freshwater. China is a fast-growing economy with energy, aluminum, armaments, cement, chemicals, coal, fertilizers, food processing, iron, machine-building, and mining and ore processing as main sectors, with the energy sector holding approximately 33% of the Asia Pacific market. All of these sectors involve either water as an input or wastewater as a byproduct. Furthermore, as population growth and urbanization rates in the region rise, the stress on Asia's water resources is rapidly intensifying, which in turn will increase the demand for UV disinfection equipment in the region.

### UV Disinfection Equipment Market Competitive Landscape

The global market for UV Disinfection Equipment has witnessed significant growth over the forecast period due to the growing digital content. There are several domestic, regional, and global players operating in the UV Disinfection Equipment market who continuously strive to gain a significant share of the overall market. During the study, MRFR has analyzed some of the major players in the global UV Disinfection Equipment market who have contributed to the market growth. These include Heraeus Holding, Alpha-Purify, Helios Quartz, Xylem Inc., Halma PLC, Kuraray Europe GmbH, Evoqua Water Technologies LLC, American Ultraviolet, Dr. Hönle AG, Advanced UV, Inc., Seoul Semiconductor Co., Ltd., Lumalier, Hitech Ultraviolet Pvt. Ltd., UVO3, and SUEZ are the major companies profiled in the global UV disinfection equipment market.

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### Market Key Players

- Heraeus Holding
- Alpha-Purify
- Helios Quartz
- Xylem Inc.
- Halma PLC
- Kuraray Europe GmbH
- Evoqua Water Technologies LLC

These manufacturers are increasing their focus on product innovations and technological advancements owing to the rising demand for devices equipped with UV technology amid the COVID-19 outbreak. For instance, Suez introduces point of use LED UV-C disinfection. New technology reduces the risk of bacterial contamination and operating costs while eliminating the impact on the environment relating to the disposal of mercury lamps.

The key players of the UV Disinfection Equipment Market include Heraeus Holding, Alpha-Purify, Helios Quartz, Xylem Inc., Halma PLC, Kuraray Europe GmbH, Evoqua Water Technologies LLC, American Ultraviolet, Dr. Hönle AG, Advanced UV, Inc., Seoul Semiconductor Co., Ltd., Lumalier, Hitech Ultraviolet Pvt. Ltd., UVO3, and SUEZ

## UV Disinfection Equipment Industry Developments

### Heraeus Holding:

- **October 26, 2023:** Heraeus announced the expansion of its Hanau, Germany, site for the production of UV lamps. This expansion will increase its capacity to meet the growing demand for UV disinfection technology.
- **January 18, 2024:** Heraeus released its financial results for 2023, reporting strong growth in its environmental & process technologies segment, which includes UV disinfection equipment.

### Alpha-Purify:

- **November 15, 2023:** Alpha-Purify announced a partnership with a major pharmaceutical company to provide UV disinfection systems for its manufacturing facilities.
- **December 5, 2023:** Alpha-Purify launched a new line of portable UV air purifiers for residential and commercial use.

## Report Overview

This study estimates revenue growth at global, regional, and country levels and offers an overview of the latest developments in each of the sub-sectors from 2018 to 2027. For this analysis, MRFR segmented the global UV Disinfection Equipment Market report based on Component, deployment, Application, End user and region.

## UV Disinfection Equipment Market Segmentation

### UV Disinfection Equipment Components Outlook

- UV Lamps
- Reactor Chambers
- Quartz Sleeves
- Controller Units
- Others

### UV Disinfection Equipment Deployment Outlook

- Portable
- Wall-Mounted
- Others

### UV Disinfection Equipment End User Outlook

- Residential
- Commercial
- Industrial
- Municipal

### UV Disinfection Equipment Application Outlook

- Water and Wastewater
- Disinfection Process

- Water Disinfection
- Air Disinfection
- Surface Disinfection
- Food & Beverage Disinfection
- Others

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