

Global Anti-Adhesion Products Market Size Study, by Product Type (Natural Adhesion Barriers, Synthetic Adhesion Barriers), by Product Form (Film Formulation, Gel Formulation, Liquid Formulation), by Application (Cardiovascular Surgeries, General/Abdominal Surgeries, Gynecological Surgeries, Neurological Surgeries, Orthopedic Surgeries, Reconstructive Surgeries, Urological Surgeries), by End-User (Ambulatory Surgical Centers, Hospitals & Clinics) and Regional Forecasts 2022-2032

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Abstracts

Global Anti-Adhesion Products market is valued at approximately USD 1.09 billion in 2023 and is anticipated to grow with a healthy growth rate of more than 6.45% over the forecast period 2024-2032. Anti-adhesion products are specialized medical devices or substances designed to prevent the formation of adhesions, which are bands of scar tissue that abnormally bind two areas of tissue or organs together. These products are commonly utilized in surgeries to minimize postoperative complications, facilitate recovery, and reduce the likelihood of reoperation due to adhesions. They function by creating a physical barrier between tissues and organs or promoting more favorable healing environments to prevent the adhesion formation process. The global rise in the number of surgical interventions, particularly in fields such as gynecology, abdominal, pelvic, and cardiovascular surgeries, has significantly propelled the need for anti-adhesion products. Enhanced awareness among healthcare professionals about the implications of adhesions and the expansion of clinics and hospitals that provide

surgical services have augmented the demand for these products. However, the application of anti-adhesion products requires precise techniques, and differences in surgical practices across regions and among individual surgeons can impact the standardization and consistency of their use. Furthermore, some anti-adhesion products have shown limited efficacy in various clinical settings or pose potential safety concerns, affecting their widespread utilization. Key players have invested in developing more effective, safer, and easier-to-use anti-adhesion products through dedicated research and innovation, addressing gaps in current offerings. Strategic collaborations between manufacturers, healthcare institutions, and research organizations can drive the advancement and dissemination of anti-adhesion technologies.

Natural adhesion barriers, derived from biological substances, are designed to mimic or enhance the body's natural barriers to adhesion formation. These products, consisting of proteins such as fibrin or collagen, are intrinsic to the human healing process and can be resorbed by the body over time. Their biocompatibility and ability to integrate with the body's healing processes make them a favored choice for many surgical applications, particularly those involving delicate tissues. Collagen and protein-based adhesion barriers, primarily derived from bovine or porcine sources, function by creating a physical barrier between tissues during the healing process, preventing them from adhering to each other. Fibrin adhesion barriers leverage the natural clotting mechanism of blood, supporting tissue regeneration while preventing adhesion formation. Synthetic adhesion barriers, crafted from man-made materials, prevent tissue adhesion without integrating into the body's natural healing processes. Hyaluronic acid (HA) adhesion barriers, synthetic biocompatible materials, prevent tissue adhesion with minimal immune response. Polyethylene glycol (PEG)-based products provide a physical separation between tissues, allowing independent healing and minimizing adhesion formation. Regenerated cellulose barriers, biodegradable and turning into a gel absorbed by the body over time, facilitate use without necessitating removal. Film formulations are increasingly preferred due to their ease of application and precision in placement. Anti-adhesion films are thin, biodegradable layers applied directly to tissues during surgical procedures, acting as a physical barrier to prevent tissue adhesion. Gel formulations, viscous semi-solid substances, conform to irregular surfaces and spaces, providing a flexible barrier that reduces or prevents adhesion. Liquid formulations, designed for application to surgical sites where they solidify or gelatinize, offer ease of application, particularly in procedures with limited access or visibility.

Cardiovascular surgeries use anti-adhesion products to prevent adhesions that could impede heart tissue movement or obstruct cardiovascular function post-surgery. General or abdominal surgeries, prone to adhesion development within the abdominal cavity, use anti-adhesion products to minimize these risks, facilitating smoother

postoperative recovery. Gynecological surgeries, including procedures on the uterus, ovaries, and fallopian tubes, use anti-adhesion products to prevent adhesions that can lead to infertility, pelvic pain, and other complications. Neurological surgeries, though less common, use anti-adhesion products to prevent adhesions affecting nervous system components. Orthopedic surgeries, particularly those involving tendon or ligament repair, use anti-adhesion products to prevent tissue adhesions restricting joint mobility or causing pain post-procedure. Reconstructive surgeries, especially those involving skin grafts or tissue flaps, use anti-adhesion products to prevent adhesions compromising aesthetic and functional outcomes. Urological surgeries use anti-adhesion products to prevent adhesions impacting urinary function or fertility. Hospitals and clinics extensively use anti-adhesion products across a broad spectrum of surgical interventions. In ambulatory surgical centers, anti-adhesion products facilitate rapid healing and reduce complications leading to readmissions, particularly in laparoscopic, gynecological, and general surgeries.

The key regions considered for the global Anti-Adhesion Products market study include Asia Pacific, North America, Europe, Latin America, and Rest of the World. North America is a dominating region in the Anti-Adhesion Products market in terms of revenue. The market growth in the region is being attributed to factors including the presence of sophisticated healthcare systems, large numbers of surgical procedures, and high patient awareness. The region is home to ongoing research and development that produces creative solutions. Whereas, the market in Asia Pacific is anticipated to grow at the fastest rate over the forecast period fueled by extensive healthcare reforms, rising healthcare spending, and rising public awareness of the advantages of modern surgical procedures. Also, rising research and development initiatives coupled with an emphasis on producing economical and effective solutions are further propelling the market demand across the region.

Major market players included in this report are:

Johnson & Johnson Services, Inc.

Baxter International Inc.

Medtronic PLC

Integra LifeSciences Holdings Corporation

Anika Therapeutics, Inc.

FzioMed, Inc.

Betatech Medical

BioCer Entwicklungs-GmbH

Lifecore Biomedical, Inc.

Innocoll Holdings Public Limited

SEIKAGAKU CORPORATION

KLAS Medical Ltd.

Leader Biomedical Europe B.V.

Olympus Corporation

Pfizer Inc.

The detailed segments and sub-segment of the market are explained below:

By Product Type:

- Natural Adhesion Barriers
- Synthetic Adhesion Barriers

By Product Form:

- Film Formulation
- Gel Formulation
- Liquid Formulation

By Application:

- Cardiovascular Surgeries
- General/Abdominal Surgeries
- Gynecological Surgeries
- Neurological Surgeries
- Orthopedic Surgeries
- Reconstructive Surgeries
- Urological Surgeries

By End-User:

- Ambulatory Surgical Centers
- Hospitals & Clinics

By Region:

North America

- U.S.
- Canada

Europe

- UK
- Germany
- France
- Spain
- Italy
- ROE

Asia Pacific

- China
- India
- Japan
- Australia
- South Korea

- RoAPAC

Latin America

- Brazil
- Mexico

Middle East & Africa

- Saudi Arabia
- South Africa
- RoMEA

Years considered for the study are as follows:

- Historical year – 2022
- Base year – 2023
- Forecast period – 2024 to 2032

Key Takeaways:

- Market Estimates & Forecast for 10 years from 2022 to 2032.
- Annualized revenues and regional level analysis for each market segment.
- Detailed analysis of geographical landscape with Country level analysis of major regions.
- Competitive landscape with information on major players in the market.
- Analysis of key business strategies and recommendations on future market approach.
- Analysis of competitive structure of the market.
- Demand side and supply side analysis of the market.

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