

Global Biological Surgical Devices Market Research Report 2026(Status and Outlook)

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Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Biological Surgical Devices competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. Biological Surgical Devices are medical instruments and single-use consumables used in surgical and perioperative care that incorporate natural or engineered biomaterials, bioactive agents, or tissue engineering technologies to achieve hemostasis, sealing, tissue repair, replacement, or regeneration. The category includes biological hemostats, fibrin or coagulation patches, surgical adhesives and sealants, biological or synthetic bone graft substitutes, absorbable sutures, adhesion barriers, and associated delivery devices. The value proposition extends beyond isolated clinical efficacy to demonstrable reductions in operative blood loss, reoperation rates, improved healing quality, and shortened length of stay?outcomes that translate into measurable economic and clinical benefits for hospitals and payers and make these products strategic components of perioperative management. In 2024, global Biosurgery Equipment production reached approximately 171 m units , with an average global market price of around US\$ 40 perunit.Demand is driven by ageing populations, increasing surgical volumes, higher adoption of minimally invasive and robot-assisted surgeries, and hospital priorities on complication control and throughput. Corporate annual reports highlight R&D investment and portfolio expansion into high-value biological materials as a deliberate growth strategy, while payers and regulators increasingly reward products that demonstrably reduce complications and readmissions?pushing the market from commodity consumables to solution-oriented offerings.Key risks include regulatory heterogeneity across jurisdictions, raw material sourcing and supply volatility, intellectual property and litigation exposure, and the capital intensity of sterile, high-quality manufacturing. Large players consolidate

advantage via scale and certification; smaller players face margin pressure absent clear differentiation. Broker and annual-report commentary also note localization and service capacity as critical cost drivers for international expansion. Hospitals are shifting toward whole-procedure procurement? seeking integrated bundles that include devices, materials, intraoperative workflows and postoperative care that together reduce bleeding, adhesions and infections. The rise in minimally invasive and day-surgery models favors small, fast-acting, absorbable and low-inflammation materials. Emerging markets demand cost-effective alternatives or localized assembly to replace costly imports, creating parallel premium and mass-market segments. Traceability, regulatory compliance and supply stability are increasingly decisive in procurement. Upstream inputs include collagen, recombinant proteins, hyaluronic acid derivatives, biodegradable polymers, antimicrobial coatings and sterile fill/packaging equipment. Material batch consistency, biocompatibility testing and sterilization residual control are preconditions for regulatory approval and clinical adoption. Single-line throughput is constrained by automation level, cleanroom and sterilization cycle times, and the assembly/testing burden of combination products; automated lines yield higher throughput for mature products, while customized, high-spec combination products materially reduce annual per-line output. Balancing capex for compliance with operational throughput is therefore essential for sustainable scale-up.

The global Biological Surgical Devices market size was estimated at USD 6845.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 5.70% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Biological Surgical Devices market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Biological Surgical Devices market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding

of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Biological Surgical Devices market.

Global Biological Surgical Devices Market: Market Segmentation Analysis

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

Key Company

Baxter

J & J

B. Braun

Sanofi

Integra Lifesciences

Medtronic

Pfizer

Stryker

BD

Advanced Medical Solutions

Medline

Chemence Medical

Adhezion Biomedical

Getinge

Haohai Biological

Yishengtang

Singclean

SeaSpine
Zimmer Biomet

Market Segmentation (by Type)

Bone Graft Substitute
Surgical Sealants
Hemostatic Agents
Soft Tissue Management
Adhesion Barriers

Market Segmentation (by Application)

Cardiovascular
Orthopedic
Neurological
Urology
General Surgery
Plastic Surgery
Gynecological

Geographic Segmentation

North America (USA, Canada, Mexico)
Europe (Germany, UK, France, Russia, Italy, Rest of Europe)
Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)
South America (Brazil, Argentina, Columbia, Rest of South America)
The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study
Neutral perspective on the market performance
Recent industry trends and developments
Competitive landscape & strategies of key players
Potential & niche segments and regions exhibiting promising growth covered
Historical, current, and projected market size, in terms of value
In-depth analysis of the Biological Surgical Devices Market

Overview of the regional outlook of the Biological Surgical Devices Market:

Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Biological Surgical Devices Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future

development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Biological Surgical Devices, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and

restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

Customization of the Report

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Contents

1 RESEARCH METHODOLOGY AND STATISTICAL SCOPE

- 1.1 Market Definition and Statistical Scope of Biological Surgical Devices
- 1.2 Key Market Segments
 - 1.2.1 Biological Surgical Devices Segment by Type
 - 1.2.2 Biological Surgical Devices Segment by Application
- 1.3 Methodology & Sources of Information
 - 1.3.1 Research Methodology
 - 1.3.2 Research Process
 - 1.3.3 Market Breakdown and Data Triangulation
 - 1.3.4 Base Year
 - 1.3.5 Report Assumptions & Caveats

2 BIOLOGICAL SURGICAL DEVICES MARKET OVERVIEW

- 2.1 Global Market Overview
 - 2.1.1 Global Biological Surgical Devices Market Size (M USD) Estimates and Forecasts (2020-2035)
 - 2.1.2 Global Biological Surgical Devices Sales Estimates and Forecasts (2020-2035)
- 2.2 Market Segment Executive Summary
- 2.3 Global Market Size by Region

3 BIOLOGICAL SURGICAL DEVICES MARKET COMPETITIVE LANDSCAPE

- 3.1 Company Assessment Quadrant
- 3.2 Global Biological Surgical Devices Product Life Cycle
- 3.3 Global Biological Surgical Devices Sales by Manufacturers (2020-2025)
- 3.4 Global Biological Surgical Devices Revenue Market Share by Manufacturers (2020-2025)
- 3.5 Biological Surgical Devices Market Share by Company Type (Tier 1, Tier 2, and Tier 3)
- 3.6 Global Biological Surgical Devices Average Price by Manufacturers (2020-2025)
- 3.7 Manufacturers? Manufacturing Sites, Areas Served, and Product Types
- 3.8 Biological Surgical Devices Market Competitive Situation and Trends
 - 3.8.1 Biological Surgical Devices Market Concentration Rate
 - 3.8.2 Global 5 and 10 Largest Biological Surgical Devices Players Market Share by Revenue

3.8.3 Mergers & Acquisitions, Expansion

4 BIOLOGICAL SURGICAL DEVICES INDUSTRY CHAIN ANALYSIS

4.1 Biological Surgical Devices Industry Chain Analysis

4.2 Market Overview of Key Raw Materials

4.3 Midstream Market Analysis

4.4 Downstream Customer Analysis

5 THE DEVELOPMENT AND DYNAMICS OF BIOLOGICAL SURGICAL DEVICES MARKET

5.1 Key Development Trends

5.2 Driving Factors

5.3 Market Challenges

5.4 Industry News

5.4.1 New Product Developments

5.4.2 Mergers & Acquisitions

5.4.3 Expansions

5.4.4 Collaboration/Supply Contracts

5.5 PEST Analysis

5.5.1 Industry Policies Analysis

5.5.2 Economic Environment Analysis

5.5.3 Social Environment Analysis

5.5.4 Technological Environment Analysis

5.6 Global Biological Surgical Devices Market Porter's Five Forces Analysis

5.6.1 Global Trade Frictions

5.6.2 U.S. Tariff Policy ? April 2025

5.6.3 Global Trade Frictions and Their Impacts to Biological Surgical Devices Market

5.7 ESG Ratings of Leading Companies

6 BIOLOGICAL SURGICAL DEVICES MARKET SEGMENTATION BY TYPE

6.1 Evaluation Matrix of Segment Market Development Potential (Type)

6.2 Global Biological Surgical Devices Sales Market Share by Type (2020-2025)

6.3 Global Biological Surgical Devices Market Size by Type (2020-2025)

6.4 Global Biological Surgical Devices Price by Type (2020-2025)

7 BIOLOGICAL SURGICAL DEVICES MARKET SEGMENTATION BY APPLICATION

- 7.1 Evaluation Matrix of Segment Market Development Potential (Application)
- 7.2 Global Biological Surgical Devices Market Sales by Application (2020-2025)
- 7.3 Global Biological Surgical Devices Market Size (M USD) by Application (2020-2025)
- 7.4 Global Biological Surgical Devices Sales Growth Rate by Application (2020-2025)

8 BIOLOGICAL SURGICAL DEVICES MARKET SALES BY REGION

- 8.1 Global Biological Surgical Devices Sales by Region
 - 8.1.1 Global Biological Surgical Devices Sales by Region
 - 8.1.2 Global Biological Surgical Devices Sales Market Share by Region
- 8.2 Global Biological Surgical Devices Market Size by Region
 - 8.2.1 Global Biological Surgical Devices Market Size by Region
 - 8.2.2 Global Biological Surgical Devices Market Size by Region
- 8.3 North America
 - 8.3.1 North America Biological Surgical Devices Sales by Country
 - 8.3.2 North America Biological Surgical Devices Market Size by Country
 - 8.3.3 U.S. Market Overview
 - 8.3.4 Canada Market Overview
 - 8.3.5 Mexico Market Overview
- 8.4 Europe
 - 8.4.1 Europe Biological Surgical Devices Sales by Country
 - 8.4.2 Europe Biological Surgical Devices Market Size by Country
 - 8.4.3 Germany Market Overview
 - 8.4.4 France Market Overview
 - 8.4.5 U.K. Market Overview
 - 8.4.6 Italy Market Overview
 - 8.4.7 Spain Market Overview
- 8.5 Asia Pacific
 - 8.5.1 Asia Pacific Biological Surgical Devices Sales by Region
 - 8.5.2 Asia Pacific Biological Surgical Devices Market Size by Region
 - 8.5.3 China Market Overview
 - 8.5.4 Japan Market Overview
 - 8.5.5 South Korea Market Overview
 - 8.5.6 India Market Overview
 - 8.5.7 Southeast Asia Market Overview
- 8.6 South America
 - 8.6.1 South America Biological Surgical Devices Sales by Country
 - 8.6.2 South America Biological Surgical Devices Market Size by Country

- 8.6.3 Brazil Market Overview
- 8.6.4 Argentina Market Overview
- 8.6.5 Columbia Market Overview
- 8.7 Middle East and Africa
 - 8.7.1 Middle East and Africa Biological Surgical Devices Sales by Region
 - 8.7.2 Middle East and Africa Biological Surgical Devices Market Size by Region
 - 8.7.3 Saudi Arabia Market Overview
 - 8.7.4 UAE Market Overview
 - 8.7.5 Egypt Market Overview
 - 8.7.6 Nigeria Market Overview
 - 8.7.7 South Africa Market Overview

9 BIOLOGICAL SURGICAL DEVICES MARKET PRODUCTION BY REGION

- 9.1 Global Production of Biological Surgical Devices by Region(2020-2025)
- 9.2 Global Biological Surgical Devices Revenue Market Share by Region (2020-2025)
- 9.3 Global Biological Surgical Devices Production, Revenue, Price and Gross Margin (2020-2025)
- 9.4 North America Biological Surgical Devices Production
 - 9.4.1 North America Biological Surgical Devices Production Growth Rate (2020-2025)
 - 9.4.2 North America Biological Surgical Devices Production, Revenue, Price and Gross Margin (2020-2025)
- 9.5 Europe Biological Surgical Devices Production
 - 9.5.1 Europe Biological Surgical Devices Production Growth Rate (2020-2025)
 - 9.5.2 Europe Biological Surgical Devices Production, Revenue, Price and Gross Margin (2020-2025)
- 9.6 Japan Biological Surgical Devices Production (2020-2025)
 - 9.6.1 Japan Biological Surgical Devices Production Growth Rate (2020-2025)
 - 9.6.2 Japan Biological Surgical Devices Production, Revenue, Price and Gross Margin (2020-2025)
- 9.7 China Biological Surgical Devices Production (2020-2025)
 - 9.7.1 China Biological Surgical Devices Production Growth Rate (2020-2025)
 - 9.7.2 China Biological Surgical Devices Production, Revenue, Price and Gross Margin (2020-2025)

10 KEY COMPANIES PROFILE

- 10.1 Baxter
 - 10.1.1 Baxter Basic Information

- 10.1.2 Baxter Biological Surgical Devices Product Overview
- 10.1.3 Baxter Biological Surgical Devices Product Market Performance
- 10.1.4 Baxter Business Overview
- 10.1.5 Baxter SWOT Analysis
- 10.1.6 Baxter Recent Developments
- 10.2 J and J
 - 10.2.1 J and J Basic Information
 - 10.2.2 J and J Biological Surgical Devices Product Overview
 - 10.2.3 J and J Biological Surgical Devices Product Market Performance
 - 10.2.4 J and J Business Overview
 - 10.2.5 J and J SWOT Analysis
 - 10.2.6 J and J Recent Developments
- 10.3 B. Braun
 - 10.3.1 B. Braun Basic Information
 - 10.3.2 B. Braun Biological Surgical Devices Product Overview
 - 10.3.3 B. Braun Biological Surgical Devices Product Market Performance
 - 10.3.4 B. Braun Business Overview
 - 10.3.5 B. Braun SWOT Analysis
 - 10.3.6 B. Braun Recent Developments
- 10.4 Sanofi
 - 10.4.1 Sanofi Basic Information
 - 10.4.2 Sanofi Biological Surgical Devices Product Overview
 - 10.4.3 Sanofi Biological Surgical Devices Product Market Performance
 - 10.4.4 Sanofi Business Overview
 - 10.4.5 Sanofi Recent Developments
- 10.5 Integra Lifesciences
 - 10.5.1 Integra Lifesciences Basic Information
 - 10.5.2 Integra Lifesciences Biological Surgical Devices Product Overview
 - 10.5.3 Integra Lifesciences Biological Surgical Devices Product Market Performance
 - 10.5.4 Integra Lifesciences Business Overview
 - 10.5.5 Integra Lifesciences Recent Developments
- 10.6 Medtronic
 - 10.6.1 Medtronic Basic Information
 - 10.6.2 Medtronic Biological Surgical Devices Product Overview
 - 10.6.3 Medtronic Biological Surgical Devices Product Market Performance
 - 10.6.4 Medtronic Business Overview
 - 10.6.5 Medtronic Recent Developments
- 10.7 Pfizer
 - 10.7.1 Pfizer Basic Information

- 10.7.2 Pfizer Biological Surgical Devices Product Overview
- 10.7.3 Pfizer Biological Surgical Devices Product Market Performance
- 10.7.4 Pfizer Business Overview
- 10.7.5 Pfizer Recent Developments
- 10.8 Stryker
 - 10.8.1 Stryker Basic Information
 - 10.8.2 Stryker Biological Surgical Devices Product Overview
 - 10.8.3 Stryker Biological Surgical Devices Product Market Performance
 - 10.8.4 Stryker Business Overview
 - 10.8.5 Stryker Recent Developments
- 10.9 BD
 - 10.9.1 BD Basic Information
 - 10.9.2 BD Biological Surgical Devices Product Overview
 - 10.9.3 BD Biological Surgical Devices Product Market Performance
 - 10.9.4 BD Business Overview
 - 10.9.5 BD Recent Developments
- 10.10 Advanced Medical Solutions
 - 10.10.1 Advanced Medical Solutions Basic Information
 - 10.10.2 Advanced Medical Solutions Biological Surgical Devices Product Overview
 - 10.10.3 Advanced Medical Solutions Biological Surgical Devices Product Market Performance
 - 10.10.4 Advanced Medical Solutions Business Overview
 - 10.10.5 Advanced Medical Solutions Recent Developments
- 10.11 Medline
 - 10.11.1 Medline Basic Information
 - 10.11.2 Medline Biological Surgical Devices Product Overview
 - 10.11.3 Medline Biological Surgical Devices Product Market Performance
 - 10.11.4 Medline Business Overview
 - 10.11.5 Medline Recent Developments
- 10.12 Chemence Medical
 - 10.12.1 Chemence Medical Basic Information
 - 10.12.2 Chemence Medical Biological Surgical Devices Product Overview
 - 10.12.3 Chemence Medical Biological Surgical Devices Product Market Performance
 - 10.12.4 Chemence Medical Business Overview
 - 10.12.5 Chemence Medical Recent Developments
- 10.13 Adhezion Biomedical
 - 10.13.1 Adhezion Biomedical Basic Information
 - 10.13.2 Adhezion Biomedical Biological Surgical Devices Product Overview
 - 10.13.3 Adhezion Biomedical Biological Surgical Devices Product Market Performance

- 10.13.4 Adhezion Biomedical Business Overview
- 10.13.5 Adhezion Biomedical Recent Developments
- 10.14 Getinge
 - 10.14.1 Getinge Basic Information
 - 10.14.2 Getinge Biological Surgical Devices Product Overview
 - 10.14.3 Getinge Biological Surgical Devices Product Market Performance
 - 10.14.4 Getinge Business Overview
 - 10.14.5 Getinge Recent Developments
- 10.15 Haohai Biological
 - 10.15.1 Haohai Biological Basic Information
 - 10.15.2 Haohai Biological Biological Surgical Devices Product Overview
 - 10.15.3 Haohai Biological Biological Surgical Devices Product Market Performance
 - 10.15.4 Haohai Biological Business Overview
 - 10.15.5 Haohai Biological Recent Developments
- 10.16 Yishengtang
 - 10.16.1 Yishengtang Basic Information
 - 10.16.2 Yishengtang Biological Surgical Devices Product Overview
 - 10.16.3 Yishengtang Biological Surgical Devices Product Market Performance
 - 10.16.4 Yishengtang Business Overview
 - 10.16.5 Yishengtang Recent Developments
- 10.17 Singclean
 - 10.17.1 Singclean Basic Information
 - 10.17.2 Singclean Biological Surgical Devices Product Overview
 - 10.17.3 Singclean Biological Surgical Devices Product Market Performance
 - 10.17.4 Singclean Business Overview
 - 10.17.5 Singclean Recent Developments
- 10.18 SeaSpine
 - 10.18.1 SeaSpine Basic Information
 - 10.18.2 SeaSpine Biological Surgical Devices Product Overview
 - 10.18.3 SeaSpine Biological Surgical Devices Product Market Performance
 - 10.18.4 SeaSpine Business Overview
 - 10.18.5 SeaSpine Recent Developments
- 10.19 Zimmer Biomet
 - 10.19.1 Zimmer Biomet Basic Information
 - 10.19.2 Zimmer Biomet Biological Surgical Devices Product Overview
 - 10.19.3 Zimmer Biomet Biological Surgical Devices Product Market Performance
 - 10.19.4 Zimmer Biomet Business Overview
 - 10.19.5 Zimmer Biomet Recent Developments

11 BIOLOGICAL SURGICAL DEVICES MARKET FORECAST BY REGION

11.1 Global Biological Surgical Devices Market Size Forecast

11.2 Global Biological Surgical Devices Market Forecast by Region

11.2.1 North America Market Size Forecast by Country

11.2.2 Europe Biological Surgical Devices Market Size Forecast by Country

11.2.3 Asia Pacific Biological Surgical Devices Market Size Forecast by Region

11.2.4 South America Biological Surgical Devices Market Size Forecast by Country

11.2.5 Middle East and Africa Forecasted Sales of Biological Surgical Devices by Country

12 FORECAST MARKET BY TYPE AND BY APPLICATION (2026-2035)

12.1 Global Biological Surgical Devices Market Forecast by Type (2026-2035)

12.1.1 Global Forecasted Sales of Biological Surgical Devices by Type (2026-2035)

12.1.2 Global Biological Surgical Devices Market Size Forecast by Type (2026-2035)

12.1.3 Global Forecasted Price of Biological Surgical Devices by Type (2026-2035)

12.2 Global Biological Surgical Devices Market Forecast by Application (2026-2035)

12.2.1 Global Biological Surgical Devices Sales (K Units) Forecast by Application

12.2.2 Global Biological Surgical Devices Market Size (M USD) Forecast by Application (2026-2035)

13 CONCLUSION AND KEY FINDINGS

List Of Tables

LIST OF TABLES

Table 1. Introduction of the Type

Table 2. Introduction of the Application

Table 3. Global Biological Surgical Devices Market Size by Type (M USD)

Table 4. Global Biological Surgical Devices Market Size by Application

Table 5. Biological Surgical Devices Market Size Comparison by Region (M USD)

Table 6. Global Biological Surgical Devices Sales (K Units) by Manufacturers (2020-2025)

Table 7. Global Biological Surgical Devices Sales Market Share by Manufacturers (2020-2025)

Table 8. Global Biological Surgical Devices Revenue (M USD) by Manufacturers (2020-2025)

Table 9. Global Biological Surgical Devices Revenue Share by Manufacturers (2020-2025)

Table 10. Company Type (Tier 1, Tier 2, and Tier 3) & (based on the Revenue in Biological Surgical Devices as of 2025)

Table 11. Global Market Biological Surgical Devices Average Price (USD/Unit) of Key Manufacturers (2020-2025)

Table 12. Manufacturers? Manufacturing Sites, Areas Served

Table 13. Manufacturers? Product Type

Table 14. Global Biological Surgical Devices Manufacturers Market Concentration Ratio (CR5 and HHI)

Table 15. Mergers & Acquisitions, Expansion Plans

Table 16. Market Overview of Key Raw Materials

Table 17. Midstream Market Analysis

Table 18. Downstream Customer Analysis

Table 19. Key Development Trends

Table 20. Driving Factors

Table 21. Biological Surgical Devices Market Challenges

Table 22. Goldman Sachs' forecast real GDP growth rate for 2025-2026

Table 23. S&P Global ' Forecast Real GDP Growth Rate For 2025-2027

Table 24. World Bank ' Forecast Real GDP Growth Rate For 2025-2026

Table 25. The Tariff Rates Imposed by the United States on Major Commodity Trading Countries

Table 26. Global Biological Surgical Devices Sales by Type (K Units)

Table 27. Global Biological Surgical Devices Market Size by Type (M USD)

- Table 28. Global Biological Surgical Devices Sales (K Units) by Type (2020-2025)
- Table 29. Global Biological Surgical Devices Sales Market Share by Type (2020-2025)
- Table 30. Global Biological Surgical Devices Market Size (M USD) by Type (2020-2025)
- Table 31. Global Biological Surgical Devices Market Share by Type (2020-2025)
- Table 32. Global Biological Surgical Devices Price (USD/Unit) by Type (2020-2025)
- Table 33. Global Biological Surgical Devices Sales (K Units) by Application
- Table 34. Global Biological Surgical Devices Market Size by Application
- Table 35. Global Biological Surgical Devices Sales by Application (2020-2025) & (K Units)
- Table 36. Global Biological Surgical Devices Sales Market Share by Application (2020-2025)
- Table 37. Global Biological Surgical Devices Market Size by Application (2020-2025) & (M USD)
- Table 38. Global Biological Surgical Devices Market Share by Application (2020-2025)
- Table 39. Global Biological Surgical Devices Sales Growth Rate by Application (2020-2025)
- Table 40. Global Biological Surgical Devices Sales by Region (2020-2025) & (K Units)
- Table 41. Global Biological Surgical Devices Sales Market Share by Region (2020-2025)
- Table 42. Global Biological Surgical Devices Market Size by Region (2020-2025) & (M USD)
- Table 43. Global Biological Surgical Devices Market Size by Region (2020-2025)
- Table 44. North America Biological Surgical Devices Sales by Country (2020-2025) & (K Units)
- Table 45. North America Biological Surgical Devices Market Size by Country (2020-2025) & (M USD)
- Table 46. Europe Biological Surgical Devices Sales by Country (2020-2025) & (K Units)
- Table 47. Europe Biological Surgical Devices Market Size by Country (2020-2025) & (M USD)
- Table 48. Asia Pacific Biological Surgical Devices Sales by Region (2020-2025) & (K Units)
- Table 49. Asia Pacific Biological Surgical Devices Market Size by Region (2020-2025) & (M USD)
- Table 50. South America Biological Surgical Devices Sales by Country (2020-2025) & (K Units)
- Table 51. South America Biological Surgical Devices Market Size by Country (2020-2025) & (M USD)
- Table 52. Middle East and Africa Biological Surgical Devices Sales by Region (2020-2025) & (K Units)

Table 53. Middle East and Africa Biological Surgical Devices Market Size by Region (2020-2025) & (M USD)

Table 54. Global Biological Surgical Devices Production (K Units) by Region(2020-2025)

Table 55. Global Biological Surgical Devices Revenue (US\$ Million) by Region (2020-2025)

Table 56. Global Biological Surgical Devices Revenue Market Share by Region (2020-2025)

Table 57. Global Biological Surgical Devices Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 58. North America Biological Surgical Devices Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 59. Europe Biological Surgical Devices Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 60. Japan Biological Surgical Devices Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 61. China Biological Surgical Devices Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 62. Baxter Basic Information

Table 63. Baxter Biological Surgical Devices Product Overview

Table 64. Baxter Biological Surgical Devices Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 65. Baxter Business Overview

Table 66. Baxter SWOT Analysis

Table 67. Baxter Recent Developments

Table 68. J and J Basic Information

Table 69. J and J Biological Surgical Devices Product Overview

Table 70. J and J Biological Surgical Devices Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 71. J and J Business Overview

Table 72. J and J SWOT Analysis

Table 73. J and J Recent Developments

Table 74. B. Braun Basic Information

Table 75. B. Braun Biological Surgical Devices Product Overview

Table 76. B. Braun Biological Surgical Devices Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 77. B. Braun Business Overview

Table 78. B. Braun SWOT Analysis

Table 79. B. Braun Recent Developments

Table 80. Sanofi Basic Information

Table 81. Sanofi Biological Surgical Devices Product Overview

Table 82. Sanofi Biological Surgical Devices Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 83. Sanofi Business Overview

Table 84. Sanofi Recent Developments

Table 85. Integra Lifesciences Basic Information

Table 86. Integra Lifesciences Biological Surgical Devices Product Overview

Table 87. Integra Lifesciences Biological Surgical Devices Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 88. Integra Lifesciences Business Overview

Table 89. Integra Lifesciences Recent Developments

Table 90. Medtronic Basic Information

Table 91. Medtronic Biological Surgical Devices Product Overview

Table 92. Medtronic Biological Surgical Devices Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 93. Medtronic Business Overview

Table 94. Medtronic Recent Developments

Table 95. Pfizer Basic Information

Table 96. Pfizer Biological Surgical Devices Product Overview

Table 97. Pfizer Biological Surgical Devices Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 98. Pfizer Business Overview

Table 99. Pfizer Recent Developments

Table 100. Stryker Basic Information

Table 101. Stryker Biological Surgical Devices Product Overview

Table 102. Stryker Biological Surgical Devices Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 103. Stryker Business Overview

Table 104. Stryker Recent Developments

Table 105. BD Basic Information

Table 106. BD Biological Surgical Devices Product Overview

Table 107. BD Biological Surgical Devices Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 108. BD Business Overview

Table 109. BD Recent Developments

Table 110. Advanced Medical Solutions Basic Information

Table 111. Advanced Medical Solutions Biological Surgical Devices Product Overview

Table 112. Advanced Medical Solutions Biological Surgical Devices Sales (K Units),

Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 113. Advanced Medical Solutions Business Overview

Table 114. Advanced Medical Solutions Recent Developments

Table 115. Medline Basic Information

Table 116. Medline Biological Surgical Devices Product Overview

Table 117. Medline Biological Surgical Devices Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 118. Medline Business Overview

Table 119. Medline Recent Developments

Table 120. Chemence Medical Basic Information

Table 121. Chemence Medical Biological Surgical Devices Product Overview

Table 122. Chemence Medical Biological Surgical Devices Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 123. Chemence Medical Business Overview

Table 124. Chemence Medical Recent Developments

Table 125. Adhezion Biomedical Basic Information

Table 126. Adhezion Biomedical Biological Surgical Devices Product Overview

Table 127. Adhezion Biomedical Biological Surgical Devices Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 128. Adhezion Biomedical Business Overview

Table 129. Adhezion Biomedical Recent Developments

Table 130. Getinge Basic Information

Table 131. Getinge Biological Surgical Devices Product Overview

Table 132. Getinge Biological Surgical Devices Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 133. Getinge Business Overview

Table 134. Getinge Recent Developments

Table 135. Haohai Biological Basic Information

Table 136. Haohai Biological Biological Surgical Devices Product Overview

Table 137. Haohai Biological Biological Surgical Devices Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 138. Haohai Biological Business Overview

Table 139. Haohai Biological Recent Developments

Table 140. Yishengtang Basic Information

Table 141. Yishengtang Biological Surgical Devices Product Overview

Table 142. Yishengtang Biological Surgical Devices Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 143. Yishengtang Business Overview

Table 144. Yishengtang Recent Developments

Table 145. Singclean Basic Information

Table 146. Singclean Biological Surgical Devices Product Overview

Table 147. Singclean Biological Surgical Devices Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 148. Singclean Business Overview

Table 149. Singclean Recent Developments

Table 150. SeaSpine Basic Information

Table 151. SeaSpine Biological Surgical Devices Product Overview

Table 152. SeaSpine Biological Surgical Devices Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 153. SeaSpine Business Overview

Table 154. SeaSpine Recent Developments

Table 155. Zimmer Biomet Basic Information

Table 156. Zimmer Biomet Biological Surgical Devices Product Overview

Table 157. Zimmer Biomet Biological Surgical Devices Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 158. Zimmer Biomet Business Overview

Table 159. Zimmer Biomet Recent Developments

Table 160. Global Biological Surgical Devices Sales Forecast by Region (2026-2035) & (K Units)

Table 161. Global Biological Surgical Devices Market Size Forecast by Region (2026-2035) & (M USD)

Table 162. North America Biological Surgical Devices Sales Forecast by Country (2026-2035) & (K Units)

Table 163. North America Biological Surgical Devices Market Size Forecast by Country (2026-2035) & (M USD)

Table 164. Europe Biological Surgical Devices Sales Forecast by Country (2026-2035) & (K Units)

Table 165. Europe Biological Surgical Devices Market Size Forecast by Country (2026-2035) & (M USD)

Table 166. Asia Pacific Biological Surgical Devices Sales Forecast by Region (2026-2035) & (K Units)

Table 167. Asia Pacific Biological Surgical Devices Market Size Forecast by Region (2026-2035) & (M USD)

Table 168. South America Biological Surgical Devices Sales Forecast by Country (2026-2035) & (K Units)

Table 169. South America Biological Surgical Devices Market Size Forecast by Country (2026-2035) & (M USD)

Table 170. Middle East and Africa Biological Surgical Devices Sales Forecast by

Country (2026-2035) & (Units)

Table 171. Middle East and Africa Biological Surgical Devices Market Size Forecast by Country (2026-2035) & (M USD)

Table 172. Global Biological Surgical Devices Sales Forecast by Type (2026-2035) & (K Units)

Table 173. Global Biological Surgical Devices Market Size Forecast by Type (2026-2035) & (M USD)

Table 174. Global Biological Surgical Devices Price Forecast by Type (2026-2035) & (USD/Unit)

Table 175. Global Biological Surgical Devices Sales (K Units) Forecast by Application (2026-2035)

Table 176. Global Biological Surgical Devices Market Size Forecast by Application (2026-2035) & (M USD)

List Of Figures

LIST OF FIGURES

- Figure 1. Product Picture of Biological Surgical Devices
- Figure 2. Data Triangulation
- Figure 3. Key Caveats
- Figure 4. Global Biological Surgical Devices Market Size (M USD), 2025-2035
- Figure 5. Global Biological Surgical Devices Market Size (M USD) (2020-2035)
- Figure 6. Global Biological Surgical Devices Sales (K Units) & (2020-2035)
- Figure 7. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 8. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 9. Evaluation Matrix of Regional Market Development Potential
- Figure 10. Biological Surgical Devices Market Size by Country (M USD)
- Figure 11. Company Assessment Quadrant
- Figure 12. Global Biological Surgical Devices Product Life Cycle
- Figure 13. Biological Surgical Devices Sales Share by Manufacturers in 2025
- Figure 14. Global Biological Surgical Devices Revenue Share by Manufacturers in 2025
- Figure 15. Biological Surgical Devices Market Share by Company Type (Tier 1, Tier 2 and Tier 3): 2025
- Figure 16. Global Market Biological Surgical Devices Average Price (USD/Unit) of Key Manufacturers in 2025
- Figure 17. The Global 5 and 10 Largest Players: Market Share by Biological Surgical Devices Revenue in 2025
- Figure 18. Industry Chain Map of Biological Surgical Devices
- Figure 19. Global Biological Surgical Devices Market PEST Analysis
- Figure 20. Global Biological Surgical Devices Market Porter's Five Forces Analysis
- Figure 21. Global Merchandise Trade as a Percentage Of GDP
- Figure 22. US - Imports of Goods by Country
- Figure 23. China Exports by Country
- Figure 24. ESG Rating Distribution of The Leading Company Compared With Its Peers
- Figure 25. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 26. Global Biological Surgical Devices Market Share by Type
- Figure 27. Sales Market Share of Biological Surgical Devices by Type (2020-2025)
- Figure 28. Sales Market Share of Biological Surgical Devices by Type in 2025
- Figure 29. Market Share of Biological Surgical Devices by Type (2020-2025)
- Figure 30. Market Share of Biological Surgical Devices by Type in 2025
- Figure 31. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 32. Global Biological Surgical Devices Market Share by Application

Figure 33. Global Biological Surgical Devices Sales Market Share by Application (2020-2025)

Figure 34. Global Biological Surgical Devices Sales Market Share by Application in 2025

Figure 35. Global Biological Surgical Devices Market Share by Application (2020-2025)

Figure 36. Global Biological Surgical Devices Market Share by Application in 2025

Figure 37. Global Biological Surgical Devices Sales Growth Rate by Application (2020-2025)

Figure 38. Global Biological Surgical Devices Sales Market Share by Region (2020-2025)

Figure 39. Global Biological Surgical Devices Market Size by Region (2020-2025)

Figure 40. North America Biological Surgical Devices Sales and Growth Rate (2020-2025) & (K Units)

Figure 41. North America Biological Surgical Devices Sales and Growth Rate (2020-2025) & (K Units)

Figure 42. North America Biological Surgical Devices Sales Market Share by Country in 2024

Figure 43. North America Biological Surgical Devices Market Size and Growth Rate (2020-2025) & (M USD)

Figure 44. North America Biological Surgical Devices Market Size by Country in 2024

Figure 45. U.S. Biological Surgical Devices Sales and Growth Rate (2020-2025) & (K Units)

Figure 46. U.S. Biological Surgical Devices Market Size and Growth Rate (2020-2025) & (M USD)

Figure 47. Canada Biological Surgical Devices Sales (K Units) and Growth Rate (2020-2025)

Figure 48. Canada Biological Surgical Devices Market Size (M USD) and Growth Rate (2020-2025)

Figure 49. Mexico Biological Surgical Devices Sales (Units) and Growth Rate (2020-2025)

Figure 50. Mexico Biological Surgical Devices Market Size (Units) and Growth Rate (2020-2025)

Figure 51. Europe Biological Surgical Devices Sales and Growth Rate (2020-2025) & (K Units)

Figure 52. Europe Biological Surgical Devices Sales Market Share by Country in 2024

Figure 53. Europe Biological Surgical Devices Market Size and Growth Rate (2020-2025) & (M USD)

Figure 54. Europe Biological Surgical Devices Market Size by Country in 2024

Figure 55. Germany Biological Surgical Devices Sales and Growth Rate (2020-2025) &

(K Units)

Figure 56. Germany Biological Surgical Devices Market Size and Growth Rate (2020-2025) & (M USD)

Figure 57. France Biological Surgical Devices Sales and Growth Rate (2020-2025) & (K Units)

Figure 58. France Biological Surgical Devices Market Size and Growth Rate (2020-2025) & (M USD)

Figure 59. U.K. Biological Surgical Devices Sales and Growth Rate (2020-2025) & (K Units)

Figure 60. U.K. Biological Surgical Devices Market Size and Growth Rate (2020-2025) & (M USD)

Figure 61. Italy Biological Surgical Devices Sales and Growth Rate (2020-2025) & (K Units)

Figure 62. Italy Biological Surgical Devices Market Size and Growth Rate (2020-2025) & (M USD)

Figure 63. Spain Biological Surgical Devices Sales and Growth Rate (2020-2025) & (K Units)

Figure 64. Spain Biological Surgical Devices Market Size and Growth Rate (2020-2025) & (M USD)

Figure 65. Asia Pacific Biological Surgical Devices Sales and Growth Rate (K Units)

Figure 66. Asia Pacific Biological Surgical Devices Sales Market Share by Region in 2024

Figure 67. Asia Pacific Biological Surgical Devices Market Size by Region in 2024

Figure 68. China Biological Surgical Devices Sales and Growth Rate (2020-2025) & (K Units)

Figure 69. China Biological Surgical Devices Market Size and Growth Rate (2020-2025) & (M USD)

Figure 70. Japan Biological Surgical Devices Sales and Growth Rate (2020-2025) & (K Units)

Figure 71. Japan Biological Surgical Devices Market Size and Growth Rate (2020-2025) & (M USD)

Figure 72. South Korea Biological Surgical Devices Sales and Growth Rate (2020-2025) & (K Units)

Figure 73. South Korea Biological Surgical Devices Market Size and Growth Rate (2020-2025) & (M USD)

Figure 74. India Biological Surgical Devices Sales and Growth Rate (2020-2025) & (K Units)

Figure 75. India Biological Surgical Devices Market Size and Growth Rate (2020-2025) & (M USD)

Figure 76. Southeast Asia Biological Surgical Devices Sales and Growth Rate (2020-2025) & (K Units)

Figure 77. Southeast Asia Biological Surgical Devices Market Size and Growth Rate (2020-2025) & (M USD)

Figure 78. South America Biological Surgical Devices Sales and Growth Rate (K Units)

Figure 79. South America Biological Surgical Devices Sales Market Share by Country in 2024

Figure 80. South America Biological Surgical Devices Market Size and Growth Rate (M USD)

Figure 81. South America Biological Surgical Devices Market Size by Country in 2024

Figure 82. Brazil Biological Surgical Devices Sales and Growth Rate (2020-2025) & (K Units)

Figure 83. Brazil Biological Surgical Devices Market Size and Growth Rate (2020-2025) & (M USD)

Figure 84. Argentina Biological Surgical Devices Sales and Growth Rate (2020-2025) & (K Units)

Figure 85. Argentina Biological Surgical Devices Market Size and Growth Rate (2020-2025) & (M USD)

Figure 86. Columbia Biological Surgical Devices Sales and Growth Rate (2020-2025) & (K Units)

Figure 87. Columbia Biological Surgical Devices Market Size and Growth Rate (2020-2025) & (M USD)

Figure 88. Middle East and Africa Biological Surgical Devices Sales and Growth Rate (K Units)

Figure 89. Middle East and Africa Biological Surgical Devices Sales Market Share by Region in 2024

Figure 90. Middle East and Africa Biological Surgical Devices Market Size and Growth Rate (M USD)

Figure 91. Middle East and Africa Biological Surgical Devices Market Size by Region in 2024

Figure 92. Saudi Arabia Biological Surgical Devices Sales and Growth Rate (2020-2025) & (K Units)

Figure 93. Saudi Arabia Biological Surgical Devices Market Size and Growth Rate (2020-2025) & (M USD)

Figure 94. UAE Biological Surgical Devices Sales and Growth Rate (2020-2025) & (K Units)

Figure 95. UAE Biological Surgical Devices Market Size and Growth Rate (2020-2025) & (M USD)

Figure 96. Egypt Biological Surgical Devices Sales and Growth Rate (2020-2025) & (K

Units)

Figure 97. Egypt Biological Surgical Devices Market Size and Growth Rate (2020-2025) & (M USD)

Figure 98. Nigeria Biological Surgical Devices Sales and Growth Rate (2020-2025) & (K Units)

Figure 99. Nigeria Biological Surgical Devices Market Size and Growth Rate (2020-2025) & (M USD)

Figure 100. South Africa Biological Surgical Devices Sales and Growth Rate (2020-2025) & (K Units)

Figure 101. South Africa Biological Surgical Devices Market Size and Growth Rate (2020-2025) & (M USD)

Figure 102. Global Biological Surgical Devices Production Market Share by Region (2020-2025)

Figure 103. North America Biological Surgical Devices Production (K Units) Growth Rate (2020-2025)

Figure 104. Europe Biological Surgical Devices Production (K Units) Growth Rate (2020-2025)

Figure 105. Japan Biological Surgical Devices Production (K Units) Growth Rate (2020-2025)

Figure 106. China Biological Surgical Devices Production (K Units) Growth Rate (2020-2025)

Figure 107. Global Biological Surgical Devices Sales Forecast by Volume (2020-2035) & (K Units)

Figure 108. Global Biological Surgical Devices Market Size Forecast by Value (2020-2035) & (M USD)

Figure 109. Global Biological Surgical Devices Sales Market Share Forecast by Type (2026-2035)

Figure 110. Global Biological Surgical Devices Market Share Forecast by Type (2026-2035)

Figure 111. Global Biological Surgical Devices Sales Forecast by Application (2026-2035)

Figure 112. Global Biological Surgical Devices Market Share Forecast by Application (2026-2035)

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