

Sodium Hyaluronate-based Products Market Size, Share & Trends Analysis Report By Type (Injectable, Topical), By Application {Pharmaceuticals (Orthopedic, Ophthalmology, Urology), Cosmetics}, By Region, And Segment Forecasts, 2021 - 2028

<https://marketpublishers.com/r/S1D8A5782F64EN.html>

Date: September 2021

Pages: 85

Price: US\$ 5,950.00 (Single User License)

ID: S1D8A5782F64EN

Abstracts

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Sodium Hyaluronate-based Products Market Growth & Trends

The global sodium hyaluronate-based products market size is expected to reach USD 15.4 billion by 2028, according to a new report by Grand View Research, Inc. The market is expected to expand at a CAGR of 7.5% from 2021 to 2028. The market growth is attributed to factors such as the increasing geriatric population, a high prevalence of osteoarthritis and cataracts, technological advancements, rising awareness, and a growing number of non-invasive aesthetic procedures globally.

The demand for antiaging cosmetics and aesthetic treatments, which help people in reversing their aging signs, is increasing, mainly due to a global increase in the aging population. Sodium hyaluronate (NaHA) is more soluble than hyaluronic acid, along with having smaller molecules and greater skin penetration. It is increasingly being used in dermal fillers that are injected into areas of the skin to fill out wrinkles and help restore a more youthful appearance. Some of the FDA-approved sodium hyaluronate dermal fillers available in the market are Restylane Defyne, Refyne, and Restylane. Thus, it is anticipated that the need for such products will act as a high-impact rendering driver for sodium hyaluronate based products over the forecast period.

The WHO predicts that by 2050, an estimated 15% of the world's population above the

age of 60 years will suffer from symptomatic osteoarthritis. Along with the aging population, an increase in other risk factors such as obesity and a sedentary lifestyle is expected to further exacerbate the problem. Due to the aforementioned factors and the effectiveness of sodium hyaluronate products in treating these conditions, its market is expected to grow significantly over the forecast period.

Although sodium hyaluronate-based products offer major benefits, due to their expensive nature, they can be out of reach for certain patient groups. For instance, the average price of NaHA injections in the U.S. ranges from USD 350 to USD 800. Moreover, benefits derived from sodium hyaluronate dermal fillers are temporary, lasting up to 18 months and requiring further upkeep treatments to maintain the desired effect, leading to additional expenses. Single-phase products and duplex products of hyaluronic acid are premium-priced products, and thus, they are not accessible to all patients. Their high price primarily reflects high manufacturing costs.

Moreover, the SARS-CoV-2 pandemic has substantially impacted the sodium hyaluronate market. A decrease in the number of surgical procedures worldwide and disruptions in the supply chain have reduced the demand for sodium hyaluronate based products worldwide.

Key players are leveraging multiple strategies such as new product launches and strategic partnerships to expand their product portfolio, and thereby, have a more competitive range of offerings. For instance, in 2020, Seikagaku Corporation and Eisai Co., Ltd. formed a marketing alliance for SI-613 (diclofenac-conjugated sodium hyaluronate) in South Korea. Based on this agreement, Eisai Korea, Inc. will be the exclusive distributor of SI-613 in South Korea.

Sodium Hyaluronate-based Products Market Report Highlights

The injectable type segment accounted for the largest share in 2020 owing to a wide range of applications, such as dermal fillers in cosmetic procedures, pain relief in osteoarthritis, surgical aids in cataract extractions, and anti-adhesives in gynecological operations

The pharmaceuticals application segment dominated the market in 2020 owing to the high usage in a variety of pharmaceutical applications

North America held the largest share of over 35.0% in 2020 due to the higher healthcare expenditure and a greater number of cataract and dermal filler

procedures as compared to other regions

Contents

CHAPTER 1 METHODOLOGY AND SCOPE

- 1.1 Market Segmentation
- 1.2 Research Methodology
- 1.3 Research Assumptions
 - 1.3.1 Estimates and Forecast Timeline
- 1.4 Research Methodology
- 1.5 Information Procurement
 - 1.5.1 Purchased Database
 - 1.5.2 GVR's Internal Database
 - 1.5.3 Secondary Sources
 - 1.5.4 Primary Research
 - 1.5.5 Details of Primary Research
- 1.6 Information or Data Analysis
 - 1.6.1 Data Analysis Models
- 1.7 Market Formulation & Validation
- 1.8 Model Details
 - 1.8.1 Commodity Flow Analysis
 - 1.8.1.1 Approach 1: Commodity flow approach
 - 1.8.1.2 Approach 2: Country wise market estimation using bottom up approach
- 1.9 Global Market: CAGR Calculation
- 1.10 List of Secondary Sources
- 1.11 List of Primary Sources
- 1.12 Objectives
 - 1.12.1 Objective 1:
 - 1.12.2 Objective 2:
- 1.13 List of Tables

CHAPTER 2 EXECUTIVE SUMMARY

- 2.1 Market Summary

CHAPTER 3 SODIUM HYALURONATE BASED PRODUCTS MARKET VARIABLES, TRENDS & SCOPE

- 3.1 Sodium hyaluronate based products Market Lineage Outlook
 - 3.1.1 Parent market outlook

- 3.2 Penetration & Growth Prospect Mapping
- 3.3 Regulatory and Reimbursement Framework
- 3.4 Market Dynamics
 - 3.4.1 Market driver analysis
 - 3.4.1.1 Increasing Geriatric Population and prevalence of osteoarthritis & Eye diseases
 - 3.4.1.2 Growing demand for minimally invasive cosmetic procedures
 - 3.4.1.3 Increasing prevalence of non-healing wounds
 - 3.4.2 Market restraint analysis
 - 3.4.2.1 Associated adverse effects of Sodium hyaluronate based products
 - 3.4.2.2 High cost of injection cycles
- 3.5 Sodium hyaluronate based products Market Analysis Tools
 - 3.5.1 Porter's Five Forces Analysis
 - 3.5.2 SWOT Analysis; By factor (Political & Legal, Economic and Technological)

CHAPTER 4 SODIUM HYALURONATE BASED PRODUCTS MARKET - COMPETITIVE ANALYSIS

- 4.1 Recent Developments & Impact Analysis, by Key Market Participants
 - 4.1.1 Company/Competition Categorization (Key innovators, Market leaders, Expansion)
 - 4.1.2 Major deals and strategic alliances
- 4.2 Vendor Landscape
 - 4.2.1 List of key distributors and channel partners
 - 4.2.2 Keycompany market share analysis, 2020
- 4.3 Public Companies
 - 4.3.1 Company market position analysis
 - 4.3.2 Competitive Dashboard Analysis
- 4.4 Private Companies
 - 4.4.1 List of key emerging companies /technology disruptors/innovators
 - 4.4.2 Regional network map

CHAPTER 5 TYPE BUSINESS ANALYSIS

- 5.1 Sodium hyaluronate based products Market: Type Movement Analysis
- 5.2 Topical
 - 5.2.1 Topical market estimates and forecast, 2017 - 2028 (USD Million)
- 5.3 Injectable
 - 5.3.1 Injectable market estimates and forecast, 2017 - 2028 (USD Million)

5.4 Others

5.4.1 Others market estimates and forecast, 2017 - 2028 (USD Million)

CHAPTER 6 APPLICATION BUSINESS ANALYSIS

6.1 Sodium hyaluronate based products Market: Application Movement Analysis

6.2 Pharmaceuticals

6.2.1 Pharmaceuticals market estimates and forecast, 2017 - 2028 (USD Million)

6.2.2 Ophthalmic

6.2.2.1 Ophthalmic market estimates and forecast, 2017 - 2028 (USD Million)

6.2.3 Orthopedic

6.2.3.1 Ophthalmic market estimates and forecast, 2017 - 2028 (USD Million)

6.2.4 Urology

6.2.4.1 Urology market estimates and forecast, 2017 - 2028 (USD Million)

6.2.5 Others

6.2.5.1 Others market estimates and forecast, 2017 - 2028 (USD Million)

6.3 Cosmetics

6.3.1 Cosmetics market estimates and forecast, 2017 - 2028 (USD Million)

CHAPTER 7 REGIONAL BUSINESS ANALYSIS

7.1 Sodium hyaluronate based products Market: Regional Movement Analysis

7.1.1 North America

7.1.1.1 North America market estimates and forecast, 2017 - 2028 (USD Million)

7.1.1.2 U.S.

7.1.1.2.1 U.S. market estimates and forecast, 2017 - 2028 (USD Million)

7.1.1.3 Canada

7.1.1.3.1 Canada market estimates and forecast, 2017 - 2028 (USD Million)

7.1.2 Europe

7.1.2.1 Europe market estimates and forecast, 2017 - 2028 (USD Million)

7.1.2.2 U.K.

7.1.2.2.1 U.K. market estimates and forecast, 2017 - 2028 (USD Million)

7.1.2.3 Germany

7.1.2.3.1 Germany market estimates and forecast, 2017 - 2028 (USD Million)

7.1.2.4 France

7.1.2.4.1 France market estimates and forecast, 2017 - 2028 (USD Million)

7.1.2.5 Spain

7.1.2.5.1 Spain market estimates and forecast, 2017 - 2028 (USD Million)

7.1.2.6 Italy

7.1.2.6.1 Italy market estimates and forecast, 2017 - 2028 (USD Million)

7.1.3 Asia Pacific

7.1.3.1 Asia Pacific market estimates and forecast, 2017 - 2028 (USD Million)

7.1.3.2 Japan

7.1.3.2.1 Japan market estimates and forecast, 2017 - 2028 (USD Million)

7.1.3.3 China

7.1.3.3.1 China market estimates and forecast, 2017 - 2028 (USD Million)

7.1.3.4 India

7.1.3.4.1 India market estimates and forecast, 2017 - 2028 (USD Million)

7.1.3.5 Australia

7.1.3.5.1 Australia market estimates and forecast, 2017 - 2028 (USD Million)

7.1.4 Latin America

7.1.4.1 Latin America market estimates and forecast, 2017 - 2028 (USD Million)

7.1.4.2 Brazil

7.1.4.2.1 Brazil market estimates and forecast, 2017 - 2028 (USD Million)

7.1.4.3 Mexico

7.1.4.3.1 Mexico market estimates and forecast, 2017 - 2028 (USD Million)

7.1.5 Middle East & Africa

7.1.5.1 Middle East & Africa Market Estimates and Forecast, 2017 - 2028 (USD Million)

7.1.5.2 South Africa

7.1.5.2.1 South Africa market estimates and forecast, 2017 - 2028 (USD Million)

7.1.5.3 Saudi Arabia

7.1.5.3.1 Saudi Arabia market estimates and forecast, 2017 - 2028 (USD Million)

CHAPTER 8 COMPANY PROFILE

8.1 Market Participation Categorization

8.2 Company Profiles

8.2.1 Allergan, Inc.

8.2.2 Galderma S.A.

8.2.3 Bohus BioTech AB.

8.2.4 LG Chem Ltd.

8.2.5 Syner-Med (Pharmaceutical Products) Ltd.

8.2.6 Anika Therapeutics Inc.

8.2.7 Cadila Pharmaceuticals Ltd.

8.2.8 Ferring Pharmaceuticals B.V.

8.2.9 Fidia Farmaceutici S.p.A.

List Of Tables

LIST OF TABLES

TABLE 1 List of secondary sources

TABLE 2 List of Abbreviations

TABLE 3 North America Sodium hyaluronate based products market estimates and forecasts, by application, 2017 - 2028 (USD Million)

TABLE 4 North America Sodium hyaluronate based products market estimates and forecasts, by type, 2017 - 2028 (USD Million)

TABLE 5 U.S. Sodium hyaluronate based products market estimates and forecasts, by application, 2017 - 2028 (USD Million)

TABLE 6 U.S. Sodium hyaluronate based products market estimates and forecasts, by type, 2017 - 2028 (USD Million)

TABLE 7 Canada Sodium hyaluronate based products market estimates and forecasts, by application, 2017 - 2028 (USD Million)

TABLE 8 Canada Sodium hyaluronate based products market estimates and forecasts, by type, 2017 - 2028 (USD Million)

TABLE 9 Europe Sodium hyaluronate based products market estimates and forecasts, by application, 2017 - 2028 (USD Million)

TABLE 10 Europe Sodium hyaluronate based products market estimates and forecasts, by type, 2017 - 2028 (USD Million)

TABLE 11 U.K. Sodium hyaluronate based products market estimates and forecasts, by application, 2017 - 2028 (USD Million)

TABLE 12 U.K. Sodium hyaluronate based products market estimates and forecasts, by type, 2017 - 2028 (USD Million)

TABLE 13 Germany Sodium hyaluronate based products market estimates and forecasts, by application, 2017 - 2028 (USD Million)

TABLE 14 Germany Sodium hyaluronate based products market estimates and forecasts, by type, 2017 - 2028 (USD Million)

TABLE 15 France Sodium hyaluronate based products market estimates and forecasts, by application, 2017 - 2028 (USD Million)

TABLE 16 France Sodium hyaluronate based products market estimates and forecasts, by type, 2017 - 2028 (USD Million)

TABLE 17 Italy Sodium hyaluronate based products market estimates and forecasts, by application, 2017 - 2028 (USD Million)

TABLE 18 Italy Sodium hyaluronate based products market estimates and forecasts, by type, 2017 - 2028 (USD Million)

TABLE 19 Spain Sodium hyaluronate based products market estimates and forecasts,

by application, 2017 - 2028 (USD Million)

TABLE 20 Spain Sodium hyaluronate based products market estimates and forecasts, by type, 2017 - 2028 (USD Million)

TABLE 21 Asia Pacific Sodium hyaluronate based products market estimates and forecasts, by application, 2017 - 2028 (USD Million)

TABLE 22 Asia Pacific Sodium hyaluronate based products market estimates and forecasts, by type, 2017 - 2028 (USD Million)

TABLE 23 Japan Sodium hyaluronate based products market estimates and forecasts, by application, 2017 - 2028 (USD Million)

TABLE 24 Japan Sodium hyaluronate based products market estimates and forecasts, by type, 2017 - 2028 (USD Million)

TABLE 25 China Sodium hyaluronate based products market estimates and forecasts, by application, 2017 - 2028 (USD Million)

TABLE 26 China Sodium hyaluronate based products market estimates and forecasts, by type, 2017 - 2028 (USD Million)

TABLE 27 India Sodium hyaluronate based products market estimates and forecasts, by application, 2017 - 2028 (USD Million)

TABLE 28 India Sodium hyaluronate based products market estimates and forecasts, by type, 2017 - 2028 (USD Million)

TABLE 29 Australia Sodium hyaluronate based products market estimates and forecasts, by application, 2017 - 2028 (USD Million)

TABLE 30 Australia Sodium hyaluronate based products market estimates and forecasts, by type, 2017 - 2028 (USD Million)

TABLE 31 Latin America Sodium hyaluronate based products market estimates and forecasts, by application, 2017 - 2028 (USD Million)

TABLE 32 Latin America Sodium hyaluronate based products market estimates and forecasts, by type, 2017 - 2028 (USD Million)

TABLE 33 Brazil Sodium hyaluronate based products market estimates and forecasts, by application, 2017 - 2028 (USD Million)

TABLE 34 Brazil Sodium hyaluronate based products market estimates and forecasts, by type, 2017 - 2028 (USD Million)

TABLE 35 Mexico Sodium hyaluronate based products market estimates and forecasts, by application, 2017 - 2028 (USD Million)

TABLE 36 Mexico Sodium hyaluronate based products market estimates and forecasts, by type, 2017 - 2028 (USD Million)

TABLE 37 MEA Sodium hyaluronate based products market estimates and forecasts, by application, 2017 - 2028 (USD Million)

TABLE 38 MEA Sodium hyaluronate based products market estimates and forecasts, by type, 2017 - 2028 (USD Million)

TABLE 39 South Africa Sodium hyaluronate based products market estimates and forecasts, by application, 2017 - 2028 (USD Million)

TABLE 40 South Africa Sodium hyaluronate based products market estimates and forecasts, by type, 2017 - 2028 (USD Million)

TABLE 41 Saudi Arabia Sodium hyaluronate based products market estimates and forecasts, by application, 2017 - 2028 (USD Million)

TABLE 42 Saudi Arabia Sodium hyaluronate based products market estimates and forecasts, by type, 2017 - 2028 (USD Million)

Table 43 List of key distributors

List Of Figures

LIST OF FIGURES

- FIG. 1 Sodium hyaluronate based products market segmentation
- FIG. 2 Market research process
- FIG. 3 Information procurement
- FIG. 4 Primary research pattern
- FIG. 5 Market research approaches
- FIG. 6 Value-chain-based sizing & forecasting
- FIG. 7 QFD modeling for market share assessment
- FIG. 8 Market formulation & validation
- FIG. 9 Market outlook (2020)
- FIG. 10 Penetration and growth prospect mapping
- FIG. 11 Sodium hyaluronate based products market driver impact analysis
- FIG. 12 Sodium hyaluronate based products market restraint impact analysis
- FIG. 13 SWOT Analysis, By Factor (Political & Legal, Economic, and Technological)
- FIG. 14 Porter's Five Forces Analysis
- FIG. 15 Sodium hyaluronate based products market type outlook: Key takeaways
- FIG. 16 Sodium hyaluronate based products market: Type movement analysis
- FIG. 17 Topical market, 2017 - 2028 (USD Million)
- FIG. 18 Injectable market, 2017 - 2028 (USD Million)
- FIG. 19 Others market, 2017 - 2028 (USD Million)
- FIG. 20 Sodium hyaluronate based products market Application outlook: Key takeaways
- FIG. 21 Sodium hyaluronate based products market: Application movement analysis
- FIG. 22 Pharmaceuticals market, 2017 - 2028 (USD Million)
- FIG. 23 Ophthalmic market, 2017 - 2028 (USD Million)
- FIG. 24 Orthopedic market, 2017 - 2028 (USD Million)
- FIG. 25 Urology market, 2017 - 2028 (USD Million)
- FIG. 26 Others market, 2017 - 2028 (USD Million)
- FIG. 27 Cosmetics market, 2017 - 2028 (USD Million)
- FIG. 28 Regional movement analysis, 2020 & 2028
- FIG. 29 Regional marketplace: Key takeaways
- FIG. 30 North America
- FIG. 31 North America Sodium hyaluronate based products market, 2017 - 2028 (USD Million)
- FIG. 32 U.S.
- FIG. 33 U.S. Sodium hyaluronate based products market, 2017 - 2028 (USD Million)
- FIG. 34 Canada

- FIG. 35 Canada Sodium hyaluronate based products market, 2017 - 2028 (USD Million)
- FIG. 36 Europe
- FIG. 37 Europe Sodium hyaluronate based products market, 2017 - 2028 (USD Million)
- FIG. 38 U.K.
- FIG. 39 U.K. Sodium hyaluronate based products market, 2017 - 2028 (USD Million)
- FIG. 40 Germany
- FIG. 41 Germany Sodium hyaluronate based products market, 2017 - 2028 (USD Million)
- FIG. 42 Spain
- FIG. 43 Spain Sodium hyaluronate based products market, 2017 - 2028 (USD Million)
- FIG. 44 France
- FIG. 45 France Sodium hyaluronate based products market, 2017 - 2028 (USD Million)
- FIG. 46 Italy
- FIG. 47 Italy Sodium hyaluronate based products market, 2017 - 2028 (USD Million)
- FIG. 48 Asia Pacific
- FIG. 49 Asia Pacific Sodium hyaluronate based products market, 2017 - 2028 (USD Million)
- FIG. 50 Japan
- FIG. 51 Japan Sodium hyaluronate based products market, 2017 - 2028 (USD Million)
- FIG. 52 China
- FIG. 53 China Sodium hyaluronate based products market, 2017 - 2028 (USD Million)
- FIG. 54 India
- FIG. 55 India Sodium hyaluronate based products market, 2017 - 2028 (USD Million)
- FIG. 56 Australia
- FIG. 57 Australia Sodium hyaluronate based products market, 2017 - 2028 (USD Million)
- FIG. 58 Latin America
- FIG. 59 Latin America Sodium hyaluronate based products market, 2017 - 2028 (USD Million)
- FIG. 60 Brazil
- FIG. 61 Brazil Sodium hyaluronate based products market, 2017 - 2028 (USD Million)
- FIG. 62 Mexico
- FIG. 63 Mexico Sodium hyaluronate based products market, 2017 - 2028 (USD Million)
- FIG. 64 Middle East and Africa
- FIG. 65 MEA Sodium hyaluronate based products market, 2017 - 2028 (USD Million)
- FIG. 66 South Africa
- FIG. 67 South Africa Sodium hyaluronate based products market, 2017 - 2028 (USD Million)
- FIG. 68 Saudi Arabia

FIG. 69 Saudi Arabia Sodium hyaluronate based products market, 2017 - 2028 (USD Million)

FIG. 70 Heat map analysis

FIG. 71 Company market position analysis (2020)

FIG. 72 Company market position analysis (2020)

FIG. 73 Market differentiators

FIG. 74 Regional Network Map

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