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Biosurgery Market Report by Product (Bone-Graft Substitutes, Soft-Tissue Attachments, Hemostatic Agents, Surgical Sealants and Adhesives, Adhesion Barriers, Staple Line Reinforcement), Source (Natural/Biologics Products, Synthetic Products), Application (Orthopedic Surgery, General Surgery, Neurological Surgery, Cardiovascular Surgery, Gynecological Surgery, and Others), End User (Hospitals, Clinics, and Others), and Region 2024-2032

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Abstracts

The global biosurgery market size reached US$ 13.9 Billion in 2023. Looking forward, IMARC Group expects the market to reach US$ 24.1 Billion by 2032, exhibiting a growth rate (CAGR) of 6.1% during 2024-2032. The market is driven by the increasing surgical procedures, technological advancements in medical devices, and growing demand for effective wound management in complex surgeries, which is enhancing surgical outcomes and recovery times for patients across the globe.

Biosurgery Market Analysis:

> Major Market Drivers: The increasing prevalence of chronic diseases and the aging population are major drivers for the biosurgery market, as they necessitate advanced surgical interventions and wound care solutions. Moreover, technological advancements in biomaterials and surgical techniques are also driving market growth by enhancing the effectiveness and safety of surgical procedures.

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Key Market Trends: There is a growing trend toward minimally invasive surgical procedures, which is escalating the demand for biosurgical products that support quick recovery and reduced post-operative complications. Besides, increased focus on personalized medicine and targeted therapies are influencing the development of biosurgical products tailored to individual patient needs.

Geographical Trends: North America holds a significant share of the biosurgery market due to its advanced healthcare infrastructure and high adoption rates of new technologies. Moreover, the markets in Asia-Pacific are experiencing rapid growth due to rising healthcare investments, increasing awareness, and a growing patient population.

Competitive Landscape: Some of the leading biosurgery companies include B. Braun Melsungen AG, Baxter International Inc., Becton Dickinson and Company, CryoLife Inc., CSL Limited, Hemostasis LLC, Integra Lifesciences Holdings Corporation, Johnson & Johnson, Medtronic plc, Pfizer Inc., Sanofi S.A., Smith & Nephew plc, Stryker Corporation and Surgalign Spine Technologies Inc., among many others.

Challenges and Opportunities: The major challenge in the biosurgery market is the high cost of advanced biosurgical products, which can limit adoption in cost-sensitive regions. Moreover, there are significant opportunities for developing cost-effective solutions and expanding into emerging markets, where rising healthcare standards present new growth potential.

Biosurgery Market Trends:

The Growing Number of Surgical Procedures

The consistent increase in surgical procedures globally significantly impacts the biosurgery market. As reported by the National Institutes of Health (NIH) statistics, in 2017, an analysis of 9.8 million major inpatient surgical procedures revealed that 11.1% involved minimally invasive surgery (MIS) and 2.5% utilized robotic assistance. This compares to the 9.6 million inpatient surgeries performed in 2018, where 11.2% were MIS and 2.9% were robotic assisted. Additionally, the percentage of ambulatory MIS procedures also grew annually, from 16.9% in 2016 to 18% in 2018.. This uptick is largely driven by advancements in medical technology and surgical techniques, which

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have made surgeries safer and more accessible. An aging population and a greater focus on enhancing quality of life contribute to this increase. As surgical volumes grow, the demand for biosurgery products, essential for reducing complications and improving outcomes, also increases. Products such as sealants, hemostatic agents, and adhesives are increasingly used to ensure better recovery and minimize intraoperative risks, thereby creating a positive biosurgery market outlook.

Increase in Chronic Diseases

The escalating prevalence of chronic diseases such as cardiovascular conditions, diabetes, and cancer is another pivotal driver for the biosurgery market. The Centers for Disease Control and Prevention notes that 60% of U.S. adults suffer from at least one chronic disease, many of which necessitate surgical interventions. According to the National Association of Chronic Disease Directors, the CDC reports that 90% of the annual $3.8 Trillion healthcare expenditure in the U.S. is linked to individuals with chronic illnesses and mental health conditions. For instance, heart disease and stroke are the leading causes of death in the United States, claiming over 944,800 lives annually, which accounts for more than one-third of all deaths. Furthermore, it is projected that the costs associated with cardiovascular diseases will reach $2 Trillion by 2050. Additionally, surgical interventions often include the use of biosurgery products to manage blood loss, repair tissues, and promote healing, particularly in complex procedures. As the incidence of chronic diseases continues to increase, the demand for innovative biosurgery solutions intensifies, encouraging companies to develop and refine technologies that cater to complex medical needs, thus increasing the overall biosurgery market revenue.

Rising Incidence of Sports Injuries

The increase in sports participation and enthusiasm for physical activities has led to a higher incidence of sports-related injuries, which is further influencing the biosurgery market value. According to a John Hopkins Medicine report, in the United States (US) over 3.5 million sports injuries occur each year. Almost 50% of all head injuries from sports or recreational activities are the result of incidents involving bicycles, skateboards, or skates. In addition, more than 775,000 kids under the age of 15 seek care for sports-related injuries in emergency departments yearly. These injuries frequently result from falls, collisions, and overexertion during unofficial sporting events or recreational athletic events. Besides, several sports injuries, including ligament rips and joint dislocations, need surgical procedures that use biosurgery products to promote a speedy and efficient recovery. Moreover, in sports medicine, these products

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are essential for accelerating recovery and getting players back to their best. As interest in sports continues to grow at amateur and professional levels, the frequency of injuries requiring surgical intervention will increase demand for biosurgery devices specifically designed for sports-related treatments in this sector.

Biosurgery Market Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on product, source, application and end user.

Breakup by Product:

- Bone-Graft Substitutes
- Soft-Tissue Attachments
- Hemostatic Agents
- Surgical Sealants and Adhesives
- Adhesion Barriers
- Staple Line Reinforcement

Bone-graft substitutes account for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the product. This includes bone-graft substitutes, soft-tissue attachments, hemostatic agents, surgical sealants and adhesives, adhesion barriers, and staple line reinforcement. According to the report, bone-graft substitutes represented the largest segment.

Bone-graft substitutes are crucial alternatives to bone grafting. These stand-ins play a critical role in many surgical operations, supporting bone regeneration and repair in orthopedics, trauma, spine surgery, and dentistry applications. They are intended to minimize the risk of donor site morbidity and infection by promoting bone development and replacing conventional autografts, which require removing bone from the patient's

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own body. Furthermore, the expansion is driven by the increasing frequency of bone and joint problems, the need for less intrusive operations, and developments in biomaterial technology. The growth of this market segment is also fueled by the creation of novel synthetic and composite grafts with improved osteoconductive and osteoinductive qualities. For instance, on 23 May 2023, Royal Biologics, Inc., a company focused on advanced cellular and autologous technologies for improved surgical outcomes, unveiled BIO-REIGN 3D. This innovative bone graft substitute is the first to use a natural hyper-crosslinked carbohydrate polymer. It is designed to enhance bone grafting procedures, and this proprietary technology is introduced alongside Royal Biologics' licensing agreement for Molecular Matrix's patented Osteo-P BGS technology.

Breakup by Source:

Natural/Biologics Products

Synthetic Products

Natural/biologics products hold the largest share of the industry

A detailed breakup and analysis of the market based on the source have also been provided in the report. This includes natural/biologics products and synthetic products. According to the report, natural/biologics products accounted for the largest market share.

According to the biosurgery market overview, natural/biologics represent the largest segment due to their effective healing properties and biocompatibility. These products, derived from substances that are naturally present in the human body or other biological sources, include fibrin sealants, collagen-based matrices, and chitosan-based solutions. Additionally, natural/biologics product’s ability to mimic natural physiological processes significantly reduces the risk of rejection and adverse reactions, making them highly preferred in surgical procedures. Moreover, market dominance is further supported by advancements in biotechnology that enhance the safety and efficacy of these materials. Consequently, the increasing demand for minimally invasive surgeries, coupled with the growing prevalence of chronic diseases requiring complex surgeries, continues to drive the growth of natural/biologics products in the market.

Breakup by Application:

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Orthopedic Surgery

General Surgery

Neurological Surgery

Cardiovascular Surgery

Gynecological Surgery

Others

Neurological surgery represents the leading market segment

The report has provided a detailed breakup and analysis of the market based on the application. This includes orthopedic surgery, general surgery, neurological surgery, cardiovascular surgery, gynecological surgery, and others. According to the report, neurological surgery represented the largest segment.

Neurological surgeries are complex and require critical precision. Additionally, biosurgery products, such as sealants, hemostatic agents, and adhesion barriers, are extensively used in neurological procedures to manage bleeding, seal tissues, and reduce post-operative complications. Moreover, the rising prevalence of neurological disorders, such as brain tumors, epilepsy, and Parkinson's disease, coupled with advancements in neurosurgical techniques are escalating the demand in this segment. Besides, the widespread adoption of minimally invasive (MI) surgeries, which require highly effective biosurgical solutions to enhance patient outcomes is further driving the biosurgery market growth. This trend is supported by technological innovations in biosurgery products, aimed at improving surgical outcomes and reducing recovery times.

Breakup by End User:

Hospitals

Clinics

Others

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Hospital exhibits a clear dominance in the market

A detailed breakup and analysis of the market based on the end user have also been provided in the report. This includes hospitals, clinics, and others. According to the report, hospitals accounted for the largest market share.

Hospitals offer a wide array of surgical procedures that frequently utilize biosurgical products. These products, which include hemostatic agents, surgical sealants, and adhesives, are integral in managing intraoperative and postoperative bleeding and promoting tissue healing. Additionally, hospitals' capacity to handle high patient volumes and conduct complex surgeries increases biosurgery demand. Additionally, the constant advancements in surgical techniques and the increasing preference for minimally invasive surgeries further amplify the utilization of biosurgical solutions in hospital settings.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

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Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

North America leads the market, accounting for the largest biosurgery market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America was the largest regional market for biosurgery.

North America is the leading region due to the advanced healthcare infrastructure,

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significant investments in research and development (R&D) activities, and the presence of leading players who drive innovation and expansion. Additionally, the increasing prevalence of chronic diseases and the growing elderly population in North America contribute to a higher demand for biosurgical products. According to the biosurgery market forecast, these factors, combined with favorable government policies and a strong trend toward minimally invasive surgeries, will continue to strengthen North America's leading position in the global biosurgery market.

Competitive Landscape:

> The biosurgery market research report has also provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the major market players in the industry include B. Braun Melsungen AG, Baxter International Inc., Becton Dickinson and Company, CryoLife Inc., CSL Limited, Hemostasis LLC, Integra Lifesciences Holdings Corporation, Johnson & Johnson, Medtronic plc, Pfizer Inc., Sanofi S.A., Smith & Nephew plc, Stryker Corporation and Surgalign Spine Technologies Inc.

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

> At present, biosurgery market players are actively enhancing market growth through a combination of strategic collaborations, innovative product launches, and expansions into new geographical markets. These companies invest heavily in research and development (R&D) to introduce advanced products that meet the increasing demands of minimally invasive surgeries and improved wound care. Additionally, market players are focusing on obtaining regulatory approvals across different regions, which helps in expanding their global footprint and accessing new markets. These strategies collectively contribute to the robust growth and resilience of the biosurgery market. For instance, in 2023, AROA Biosurgery Ltd. revealed the release of a new retrospective pilot case series that explores the use of Myriad Matrix and Myriad Morcells in the surgical treatment of contaminated volumetric soft tissue defects. It reviewed 13 complex traumatic wounds in 10 patients at a single facility. The study reported an average time of 23.4±9.2 days for achieving soft tissue coverage and fill, with a median of one product application and no complications among participants. Moreover, the research focused on injuries from motor vehicle accidents, abdominal

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dehiscence after hernia repair, Fournier's Gangrene, compartment syndrome, and pressure injuries at a US Level 1 trauma center. It found that the Myriad products facilitated effective soft tissue formation with no reported complications, reinforcing the utility of AROA ECM products in trauma care.

Biosurgery Market News:

November 2023, Ethicon, a Johnson & Johnson MedTech company, has announced the approval of ETHIZIA, a hemostatic solution shown to provide effective and lasting control of severe bleeding in challenging situations. This new hemostatic patch enhances Ethicon's extensive biosurgery range and strengthens its capability to meet urgent needs in bleeding control.

Key Questions Answered in This Report:

How has the global biosurgery market performed so far, and how will it perform in the coming years?

What are the drivers, restraints, and opportunities in the global biosurgery market?

What is the impact of each driver, restraint, and opportunity on the global biosurgery market?

What are the key regional markets?

Which countries represent the most attractive biosurgery market?

What is the breakup of the market based on the product?

Which is the most attractive product in the biosurgery market?

What is the breakup of the market based on the source?

Which is the most attractive source in the biosurgery market?

What is the breakup of the market based on the application?

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Which is the most attractive application in the biosurgery market?

What is the breakup of the market based on the end user?

Which is the most attractive end user in the biosurgery market?

What is the competitive structure of the market?

Who are the key players/companies in the global biosurgery market?

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