

Hemostasis and Tissue Sealing Agents Market Report by Product Type (Topical Hemostats, Adhesive and Tissue Sealant), Material Type (Collagen-based, Oxidized Regenerated Cellulose (ORC) based, Gelatin-based, Polysaccharide-based, and Others), Application (General Surgery, Minimally Invasive Surgery, and Others), End User (Hospitals, Ambulatory Surgical Centers, Home Care Settings, and Others), and Region 2024-2032

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Abstracts

The global hemostasis and tissue sealing agents market size reached US\$ 6.8 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 11.9 Billion by 2032, exhibiting a growth rate (CAGR) of 6.2% during 2024-2032. The market is experiencing steady growth driven by rising number of surgical procedures, technological advancements leading to enhanced product efficacy, safety, and ease of use, and increasing prevalence of chronic diseases, such as cardiovascular ailments, cancer, and diabetes.

Hemostasis and Tissue Sealing Agents Market Analysis:

Market Growth and Size: The market is witnessing moderate growth on account of increasing preferences for minimally invasive (MI) surgeries, along with favorable governing initiatives.

Technological Advancements: Advanced biomaterials, delivery systems, and improved hemostatic properties are propelling the market growth.

Industry Applications: Hemostasis and tissue sealing agents find applications across a wide range of surgical procedures, including cardiovascular and orthopedic.

Geographical Trends: North America leads the market, driven by the presence of highly developed healthcare infrastructure with access to advanced medical technologies and skilled healthcare professionals. However, Asia Pacific is emerging as a fast-growing market due to the improving healthcare infrastructure.

Competitive Landscape: Key players are investing in research and development (R&D) activities to explore novel biomaterials, formulations, and delivery systems for enhancing product efficacy, safety, and usability.

Challenges and Opportunities: While the market faces challenges, such as product safety concerns, it also encounters opportunities on account of the rising focus on addressing unmet medical needs.

Future Outlook: The future of the hemostasis and tissue sealing agents market looks promising with the increasing geriatric population. In addition, the rising need for cost-effectiveness and value-based care is anticipated to bolster the market growth.

Hemostasis and Tissue Sealing Agents Market Trends:

Rising number of surgical procedures

The increasing number of surgical procedures among the masses across the globe is supporting the hemostasis and tissue sealing agents market growth. People are suffering from various diseases that require surgical intervention. Hemostasis and tissue sealing agents are vital for controlling bleeding and promoting healing during various surgical interventions, ranging from routine procedures to complex surgeries.

Additionally, the rising need for effective hemostatic and sealing solutions to address bleeding complications and enhance patient outcomes is propelling the market growth.

Complex surgeries often involve intricate tissue dissection and manipulation, leading to a higher risk of bleeding complications. Hemostasis and tissue sealing agents play a critical role in addressing these challenges and ensuring successful outcomes.

Furthermore, increasing preferences for MI surgical techniques, such as laparoscopic and robotic-assisted procedures, are contributing to the market growth. While MI surgeries offer benefits like reduced trauma and faster recovery times, they still require effective hemostatic control and tissue sealing, which are facilitated by specialized products.

Technological Advancements

Technological innovations in hemostasis and tissue sealing agents assist in enhancing product efficacy, safety, and ease of use. These advancements include the development of novel biomaterials, advanced delivery systems, and improved hemostatic properties. Moreover, the introduction of hemostatic agents with superior

clotting mechanisms and tissue sealants with enhanced adhesive properties enable better hemostasis and wound closure. Advancements in biocompatible materials and biodegradable formulations address concerns regarding tissue compatibility and long-term safety. Furthermore, novel delivery systems enable the precise application of hemostasis and tissue sealing agents to the surgical site. These systems include spray applicators, injectable formulations, or specialized devices that allow for controlled and targeted delivery of the agents. Targeted delivery systems improve surgical efficiency, minimize wastage, and enhance the effectiveness of hemostasis and tissue sealing agents. Besides this, biodegradable hemostasis and tissue sealing agents are designed to degrade over time and be absorbed by the body, eliminating the need for subsequent removal or intervention.

Increasing prevalence of chronic diseases

The growing prevalence of chronic diseases, such as cardiovascular ailments, cancer, and diabetes, is catalyzing demand for hemostasis and tissue sealing agents. Chronic conditions often require surgical procedures for diagnosis, treatment, or management. People are increasingly suffering from these diseases due to changing lifestyles, environmental factors, and eating habits. Chronic wounds, such as diabetic ulcers, pressure ulcers, and venous ulcers, are common complications of chronic diseases and often require surgical intervention for debridement, closure, or management. Hemostasis and tissue sealing agents are utilized in these procedures to promote hemostasis, facilitate wound closure, and accelerate healing. Apart from this, patients with chronic diseases may present with comorbidities or physiological impairments that increase the risk of surgical complications, including bleeding and wound healing issues. Hemostasis and tissue sealing agents play a critical role in mitigating these risks by controlling bleeding, sealing tissues, and promoting optimal wound healing, which is supporting the market growth.

Hemostasis and Tissue Sealing Agents Industry 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 type, material type, application, and end user.

Breakup by Product Type:

Topical Hemostats

Adhesive and Tissue Sealant

Topical hemostats account for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the product type. This includes topical hemostats and adhesive and tissue sealant. According to the report, topical hemostats represented the largest segment.

Topical hemostats are agents applied directly to the bleeding site to control bleeding. They are available in various forms, such as powders, gels, sponges, and patches. These hemostats work by promoting coagulation, accelerating clot formation, or enhancing platelet aggregation to achieve hemostasis. They are particularly useful in surgical procedures where direct pressure or conventional methods may not be sufficient to achieve hemostasis.

Adhesive and tissue sealant products are used to seal tissues, close wounds, or bond tissues together. They are available in liquid, gel, or film forms and are applied directly to the tissue surface. These products contain biocompatible materials that adhere to the tissue surface and create a barrier, promoting wound healing and preventing leakage or further bleeding.

Breakup by Material Type:

- Collagen-based
- Oxidized Regenerated Cellulose (ORC) based
- Gelatin-based
- Polysaccharide-based
- Others

A detailed breakup and analysis of the market based on the material type have also been provided in the report. This includes collagen-based, oxidized regenerated cellulose (ORC) based, gelatin-based, polysaccharide-based, and others.

Collagen-based hemostats utilize collagen, a protein found in connective tissues. Collagen promotes platelet adhesion and activation, initiating the clotting cascade to achieve hemostasis. Collagen-based hemostats are available in various forms, such as sponges, powders, or patches, and are widely used in surgical procedures across different specialties.

Oxidized regenerated cellulose (ORC) based hemostats are derived from cellulose, a

polysaccharide found in plants. Through a process of oxidation and regeneration, cellulose is converted into ORC, which possesses hemostatic properties. ORC-based hemostats work by promoting platelet aggregation and accelerating clot formation at the bleeding site. They are available in different forms like gauzes, pads, or powders and are commonly used in surgeries where rapid hemostasis is required.

Gelatin-based hemostats are derived from collagen obtained from animal sources, usually bovine or porcine. Gelatin possesses hemostatic properties and is often combined with thrombin or other clotting factors to enhance its efficacy. These hemostats come in various forms, such as sponges, powders, or sheets, and are used in surgical procedures to control bleeding and promote wound healing.

Polysaccharide-based hemostats utilize polysaccharides, complex carbohydrates found in plants or animals. These hemostats work by promoting platelet activation and aggregation, facilitating clot formation. Polysaccharide-based hemostats include products derived from substances like chitosan, alginate, or starch. They are available in different forms like powders, gels, or films and are utilized in surgical procedures to achieve hemostasis and promote tissue sealing.

Breakup by Application:

General Surgery

Minimally Invasive Surgery

Others

General surgery represents the leading market segment

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

General surgery encompasses a wide range of surgical procedures involving various organs and tissues within the body. These surgeries can include procedures, such as appendectomies, hernia repairs, gallbladder removals, and bowel surgeries. Hemostasis and tissue sealing agents play a crucial role in general surgery by controlling bleeding, sealing tissues, and promoting wound healing. These agents are used to manage bleeding from incisions, dissected tissues, and damaged vessels, ensuring optimal surgical outcomes and patient recovery.

Minimally invasive surgery (MIS), also known as laparoscopic or keyhole surgery, involves performing surgical procedures through small incisions using specialized instruments and a camera for visualization. MIS offers several advantages as compared to traditional open surgery, such as reduced post-operative pain, shorter hospital stays, and quicker recovery times. In minimally invasive (MI) procedures, hemostasis and tissue sealing agents are essential for controlling bleeding and sealing tissues through small incisions. These agents are applied directly to the surgical site to achieve hemostasis and ensure optimal tissue closure.

Breakup by End User:

Hospitals

Ambulatory Surgical Centers

Home Care Settings

Others

The report has provided a detailed breakup and analysis of the market based on the end user. This includes hospitals, ambulatory surgical centers, home care settings, and others.

Hospitals serve as primary settings for a wide range of medical interventions, including surgical procedures requiring hemostasis and tissue sealing agents. These facilities encompass various departments, such as operating rooms, emergency departments, and specialty units, where surgeries are performed. Hospitals have comprehensive resources, including specialized equipment, trained personnel, and integrated healthcare services, making them key users of hemostasis and tissue sealing agents. These agents are used across different surgical specialties within hospital settings to control bleeding, seal tissues, and promote wound healing.

Ambulatory surgical centers (ASCs), also known as outpatient surgery centers or day surgery centers, provide surgical services on an outpatient basis, allowing patients to undergo procedures without overnight hospitalization. ASCs offer a convenient and cost-effective alternative to traditional hospital-based surgeries, particularly for minor or elective procedures. In ASCs, hemostasis and tissue sealing agents are utilized to control bleeding and promote wound closure during various surgical interventions. These centers often specialize in specific surgical specialties, such as ophthalmology, orthopedics, or gastroenterology, where hemostasis and tissue sealing agents are routinely used to ensure safe and efficient surgical outcomes.

Home care settings involve the provision of medical care, including post-operative care, within the home of patients. Hemostasis and tissue sealing agents are used to address wound complications, promote healing, and prevent infections, ensuring continuity of care and facilitating the recovery process of patients within the comfort of their homes.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

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 hemostasis and tissue sealing agents market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America

(Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounted for the largest market share due to the presence of highly developed healthcare infrastructure, with access to advanced medical technologies and skilled healthcare professionals. Additionally, the rising number of surgical procedures among individuals is bolstering the market growth.

Asia Pacific stands as another key region in the market, driven by the increasing adoption of MI surgeries among the masses. In addition, improving healthcare infrastructure is contributing to the growth of the market.

Europe maintains a strong presence in the market, with the rising prevalence of chronic diseases among individuals. Besides this, stringent standards for the approval and marketing of medical devices, including hemostasis and tissue sealing agents, are impelling the market growth.

Latin America exhibits the growing potential in the market on account of the increasing need for hemostasis and tissue sealing agents during surgical interventions. Furthermore, the rising awareness among healthcare professionals and patients about the benefits of advanced surgical techniques and medical products is bolstering the market growth.

The Middle East and Africa region is primarily driven by improving healthcare infrastructure. Moreover, thriving medical tourism in the region is propelling the market growth.

Leading Key Players in the Hemostasis and Tissue Sealing Agents Industry:

Key players are investing in R&D activities to explore novel biomaterials, formulations, and delivery systems to enhance product efficacy, safety, and usability. They are continuously innovating their product offerings to meet the diverse needs of healthcare providers and patients by developing advanced hemostatic agents and tissue sealants with enhanced hemostatic properties, faster sealing times, and improved biocompatibility. In addition, companies are expanding the indications for their hemostasis and tissue sealing agents, making them applicable to a wider range of surgical procedures. This involves obtaining regulatory approvals for new indications and conducting clinical trials to demonstrate product efficacy and safety in different surgical specialties. Furthermore, companies are expanding their market reach by entering new geographical regions.

The market research report has provided a comprehensive analysis of the competitive

landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Advance Medical Solution Group Plc.

Artivion Inc.

B. Braun Melsungen AG

Baxter International Inc.

Becton, Dickinson & Company

Integra LifeSciences Corporation

Johnson & Johnson

Medtronic plc

Pfizer Inc.

Smith & Nephew plc

Terumo Corporation

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

Latest News:

July 29, 2021: Baxter International Inc completed the acquisition of certain assets related to PerClot polysaccharide hemostatic system from CryoLife, Inc. PerClot further enhances the ability of the company to optimize patient care by addressing a broad range of intraoperative bleeding with both active and passive hemostatic solutions.

November 15, 2023: Johnson & Johnson MedTech company 'Ethicon' announced the approval of ETHIZIATM, an adjunctive hemostat solution, which is clinically proven to achieve sustained hemostasis in difficult to control bleeding situations.

February 26, 2020: Terumo Corporation launched AQUABRID® a new surgical sealant especially developed for aortic procedures. It reacts with blood and forms an elastic layer that adheres tightly to the tissue. It is safe and effective in achieving hemostasis, even when blood coagulation is inhibited during cardiac surgery.

Key Questions Answered in This Report

1. What was the size of the global hemostasis and tissue sealing agents market in 2023?

2. What is the expected growth rate of the global hemostasis and tissue sealing agents market during 2024-2032?

3. What are the key factors driving the global hemostasis and tissue sealing agents market?

4. What has been the impact of COVID-19 on the global hemostasis and tissue sealing agents market?
5. What is the breakup of the global hemostasis and tissue sealing agents market based on the product type?
6. What is the breakup of the global hemostasis and tissue sealing agents market based on the application?
7. What are the key regions in the global hemostasis and tissue sealing agents market?
8. Who are the key players/companies in the global hemostasis and tissue sealing agents market?

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