

Hemostats Market Report by Product (Thrombin Based, Combination Based, Oxidized Regenerated Cellulose Based, Gelatin Based, Collagen Based), Application (Orthopedic Surgery, General Surgery, Neurological Surgery, Cardiovascular Surgery, Reconstructive Surgery, Gynecological Surgery, and Others), Formulation (Matrix and Gel Hemostats, Sheet and Pad Hemostats, Sponge Hemostats, Powder Hemostats), and Region 2024-2032

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Abstracts

The global hemostats market size reached US\$ 3.5 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 5.8 Billion by 2032, exhibiting a growth rate (CAGR) of 5.73% during 2024-2032. The rising surgical procedures, technological advancements, expansion of healthcare infrastructure, increasing awareness among healthcare professionals, and a growing aging population are some of the major factors propelling the market.

Hemostats are medical instruments used to control bleeding by clamping blood vessels or tissue during surgical procedures or wound treatment. They typically consist of a pair of hinged, scissor like handles with serrated jaws at the working end. When the handles are squeezed, the jaws close, creating a firm grip on the tissue or blood vessel. This prevents the flow of blood and facilitates precise manipulation or suturing. Hemostats come in various sizes and designs, making them versatile tools in healthcare settings. They play a crucial role in ensuring a bloodless surgical field, reducing the risk of excessive bleeding, and enabling effective medical procedures.

The rising incidence of surgical procedures, including complex surgeries, minimally invasive procedures, and trauma cases, represents the prime factor fueling the demand for hemostatic agents and instruments. Moreover, as the global population continues to age, the prevalence of chronic diseases necessitating surgical interventions, such as cardiovascular diseases and cancer, is increasing, aiding in market expansion. Concurrent with this, ongoing advancements in medical technology have led to the development of innovative hemostatic products with improved efficacy and safety profiles, further propelling market growth. Additionally, the growing awareness among healthcare professionals about the importance of effective hemostasis to reduce complications and enhance patient outcomes has driven the adoption of hemostats. Furthermore, the expansion of healthcare infrastructure in emerging markets, coupled with increasing healthcare expenditure, is contributing to the growth of the hemostats market as access to surgical care becomes more widespread.

Hemostats Market Trends/Drivers:

Increasing surgical procedures

The growing number of surgical procedures worldwide is a significant driver for the hemostats market. Surgical interventions are essential for treating various medical conditions, from routine procedures like appendectomies to complex surgeries like organ transplants. As the global population continues to grow and age, the prevalence of chronic diseases such as cardiovascular diseases, cancer, and orthopedic issues is also on the rise. This has led to an increasing demand for surgical interventions, and consequently, hemostatic agents and instruments. Hemostats are crucial in these procedures to control bleeding, reduce the risk of complications, and improve patient outcomes.

Ongoing technological advancements

Advances in medical technology have played a pivotal role in the growth of the hemostats market. These innovations have led to the development of more effective and safer hemostatic products. For example, newer hemostats often incorporate biocompatible and bioabsorbable materials, reducing the risk of adverse reactions. Additionally, some hemostatic agents are engineered to work more rapidly, thus saving valuable surgical time. Moreover, advancements in surgical techniques, such as minimally invasive surgery, have increased the demand for specialized hemostatic tools tailored to these procedures. Technological innovations continue to drive product development, enhancing the overall market.

Healthcare infrastructure expansion in emerging markets

Emerging markets, particularly in Asia, Latin America, and Africa, are experiencing significant growth in healthcare infrastructure and expenditure. This expansion is driven by urbanization, rising disposable incomes, and increased government initiatives to improve healthcare access. As healthcare facilities become more accessible, the number of surgical procedures performed in these regions is on the rise. Consequently, there is a growing demand for hemostatic agents and instruments to support these surgeries. The expansion of healthcare infrastructure not only increases the market's geographical reach but also fosters opportunities for partnerships and collaborations between local and international hemostat manufacturers.

Hemostats Industry Segmentation:

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

Breakup by Product:

- Thrombin Based
- Combination Based
- Oxidized Regenerated Cellulose Based
- Gelatin Based
- Collagen Based

Thrombin based dominates the market

The report has provided a detailed breakup and analysis of the market based on the product. This includes thrombin based, combination based, oxidized regenerated cellulose based, gelatin based, and collagen based. According to the report, thrombin based represented the largest segment.

The demand for thrombin based hemostats is being propelled by their rapid action and versatility in managing bleeding in various medical scenarios. Thrombin is a naturally occurring enzyme that plays a crucial role in the blood clotting process. Thrombin-based hemostats offer a targeted and rapid solution for achieving hemostasis, making them particularly valuable in situations where time is critical, such as emergency surgeries and trauma cases. Furthermore, their ability to work independently of the body's clotting

mechanisms makes them an attractive option, and their compatibility with other hemostatic agents enhances their versatility in surgical applications, further driving their demand in the healthcare industry.

Breakup by Application:

- Orthopedic Surgery
- General Surgery
- Neurological Surgery
- Cardiovascular Surgery
- Reconstructive Surgery
- Gynecological Surgery
- Others

General surgery holds the largest share in the market

A detailed breakup and analysis of the market based on the application has also been provided in the report. This includes orthopedic, general, neurological, cardiovascular, reconstructive, gynecological, and other surgeries. According to the report, general surgery accounted for the largest market share.

The increasing complexity and diversity of surgical procedures represent one of the main factors impelling the need for hemostats in general surgery applications. General surgery encompasses a wide range of operations, from abdominal surgeries to vascular procedures, each posing unique challenges in achieving effective hemostasis. Surgeons are increasingly relying on hemostatic agents and instruments to minimize bleeding, reduce operating time, and enhance patient outcomes. As surgical techniques advance, minimally invasive procedures become more common, necessitating specialized hemostatic tools. Moreover, the expanding aging population with comorbidities requires more surgical interventions, further fueling the demand for reliable and versatile hemostats in general surgery applications.

Breakup by Formulation:

- Matrix and Gel Hemostats
- Sheet and Pad Hemostats
- Sponge Hemostats
- Powder Hemostats

Matrix and gel hemostats dominate the market

The report has provided a detailed breakup and analysis of the market based on the formulation. This includes matrix and gel, sheet and pad, sponge, and powder hemostats. According to the report, matrix and gel hemostats represented the largest segment.

The demand for matrix and gel hemostats is driven by their unique characteristics, such as ease of application and versatility in various medical settings. These hemostatic products offer a user-friendly approach to achieving hemostasis, especially in situations where precise control is essential, such as neurosurgery and ophthalmic procedures. Matrix and gel hemostats conform to irregular wound shapes and adhere well to tissues, ensuring effective sealing of bleeding sites. Apart from this, they often have a resorbable nature, reducing the risk of adverse reactions and minimizing the need for postoperative removal, making them increasingly favored by surgeons and healthcare professionals in diverse clinical applications.

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 exhibits a clear dominance, accounting for the largest hemostats 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.

The North American hemostats market is experiencing significant growth due to the region's aging population driving a higher prevalence of chronic diseases, resulting in an increased demand for surgical interventions, which in turn necessitates the use of hemostatic agents and instruments. Concurrent with this, the well-established healthcare infrastructure in North America, coupled with high healthcare expenditure, allows for extensive adoption of advanced hemostatic technologies and products. Additionally, ongoing technological advancements in the healthcare sector, particularly in the United States, are contributing to the development of innovative hemostatic solutions that are highly sought after by healthcare providers. Furthermore, the region's regulatory environment and stringent quality standards ensure the availability of safe and effective hemostats, further boosting market growth. Apart from this, the rising awareness among healthcare professionals regarding the importance of efficient hemostasis to minimize complications is propelling the North America hemostats market forward.

Competitive Landscape:

The global hemostats market is characterized by intense competition, driven by a multitude of established and emerging players striving to gain a competitive edge. Key market participants include leading healthcare companies that have a strong global presence and offer a wide range of hemostatic products. These industry giants engage in extensive research and development efforts to introduce innovative hemostats and expand their product portfolios. Additionally, smaller, niche-focused companies are gaining prominence by offering specialized hemostatic solutions. Collaborations, partnerships, and mergers and acquisitions are common strategies in this dynamic

landscape, aimed at strengthening market positions and enhancing product offerings. The competitive rivalry is further fueled by the increasing demand for minimally invasive surgery and the ongoing quest to develop hemostatic agents with enhanced safety profiles, driving continuous innovation and competitiveness in the global hemostats market.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Arch Therapeutics Inc.
Baxter International Inc.
B. Braun Melsungen Aktiengesell
C. R. Bard Inc.
GELITA MEDICAL GmbH
Integra LifeSciences Corporation
Johnson & Johnson
Pfizer Inc.
Stryker Corporation
Teleflex Incorporated
Z-Medica LLC

Recent Developments:

In July 2023, Baxter International Inc. announced the launch of PERCLOT Absorbable Hemostatic Powder in the U.S. PERCLOT is a passive, absorbable hemostatic powder that is ready to use and designed for patients with intact coagulation to address mild bleeding.

In April 2023, Arch Therapeutics, Inc. a marketer and developer of novel self-assembling wound care and biosurgical products, unveiled its AC5® Advanced Wound System (“AC5”) at the Symposium on Advanced Wound Care. .

Key Questions Answered in This Report:

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

What has been the impact of COVID-19 on the global hemostats market?

What are the key regional markets?

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

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

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

What are the various stages in the value chain of the industry?

What are the key driving factors and challenges in the industry?

What is the structure of the global hemostats market and who are the key players?

What is the degree of competition in the industry?

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