

Vascular Grafts Market Report by Product (Endovascular Stent Grafts, Hemodialysis Access Grafts, Coronary Artery By-Pass Grafts, Vascular Grafts for Aorta Disease, Peripheral Vascular Grafts), Raw Material (Polytetrafluoroethylene (PTFE), Polyester, Polyurethane, Biosynthetic), Application (Cardiac Aneurysm, Kidney Failure, Vascular Occlusion, Coronary Artery Disease), End User (Hospitals, Ambulatory Surgical Centers (ASCs)), and Region 2024-2032

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Abstracts

The global vascular grafts market size reached US\$ 1.9 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 3.2 Billion by 2032, exhibiting a growth rate (CAGR) of 5.7% during 2024-2032. The increasing number of fatal road accidents and trauma cases, rising inclination towards medical tourism, and the growing number of surgical procedures, especially among the geriatric population, are some of the major factors propelling the market.

Vascular grafts are medical devices used to replace, bypass, or restore functionality to damaged or diseased blood vessels in the human body. They serve as artificial conduits that facilitate blood flow and ensure that vital organs and tissues receive adequate blood supply. They can be made from various materials, including synthetic polymers like dacron and teflon or biological materials like vein segments harvested from the patient or a donor. They are commonly used in surgical procedures, such as coronary artery bypass grafting (CABG), peripheral artery bypass, and hemodialysis access.

The increasing number of fatal road accidents and the expanding number of trauma cases are driving the demand for vascular grafts around the world. Moreover, the rising inclination towards medical tourism, wherein people are traveling to countries with advanced healthcare systems for specialized treatments, including vascular graft surgeries, is favoring the growth of the market. In addition, the growing number of surgical procedures and the rising global geriatric population, which is more susceptible to medical disorders, are influencing the market positively. Apart from this, the increasing focus on preventive healthcare, which leads to early diagnosis and treatment of vascular conditions, is catalyzing the need for vascular grafts as a preemptive measure. Furthermore, the growing number of ambulatory surgical centers, which offer quicker and more convenient surgical procedures, are creating a positive outlook for the market.

Vascular Grafts Market Trends/Drivers:

Increase in prevalence of lifestyle diseases

One of the primary factors that are driving the demand for vascular grafts is the surging prevalence of lifestyle-related diseases like obesity and diabetes. These conditions significantly elevate the risk of developing vascular problems that may necessitate graft surgeries. As lifestyle diseases continue to surge, the requirement for vascular grafts to manage associated vascular complications is likely to grow substantially.

Rise in public awareness and education

Increasing public awareness about vascular diseases and the available treatment options is also catalyzing the demand for vascular grafts. Public health campaigns, educational programs, and digital platforms are educating people about the risks of vascular conditions and the importance of early diagnosis and treatment. This heightened awareness is leading to more people seeking medical advice and, consequently, increasing the number of vascular graft surgeries being performed.

Growing regulatory approvals and reimbursement policies

Favorable regulatory approvals and reimbursement policies play a crucial role in driving the market for vascular grafts. Regulatory bodies of numerous countries have stringent but clear pathways for the approval of new medical devices, including vascular grafts. Once approved, these products are more readily adopted by medical facilities.

Additionally, comprehensive reimbursement policies make it financially feasible for patients to opt for these advanced treatments, further elevating the demand for vascular grafts in the market.

Vascular Grafts Industry Segmentation:

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

Breakup by Product:

Endovascular Stent Grafts

Hemodialysis Access Grafts

Coronary Artery By-Pass Grafts

Vascular Grafts for Aorta Disease

Peripheral Vascular Grafts

Endovascular stent grafts dominate the market

The report has provided a detailed breakup and analysis of the market based on the product. This includes endovascular stent grafts, hemodialysis access grafts, coronary artery by-pass grafts, vascular grafts for aorta disease, and peripheral vascular grafts. According to the report, endovascular stent grafts represented the largest segment. Endovascular stent grafts are a specialized type of vascular graft used primarily for treating conditions like abdominal aortic aneurysms and thoracic aortic aneurysms. They can be placed using minimally invasive (MI) surgical techniques. A catheter is used to deliver the stent graft to the affected area through a small incision, usually in the groin. The MI nature of the procedure generally leads to shorter recovery times and less postoperative pain.

Hemodialysis access grafts serve a different purpose but are equally important in the field of medicine. They are used to provide reliable and durable vascular access for

patients who require long-term hemodialysis, a treatment for kidney failure. Typically made of synthetic materials like PTFE (polytetrafluoroethylene), these grafts are surgically implanted to connect an artery to a vein, usually in the arm. Hemodialysis access grafts offer the advantage of immediate use, as opposed to AV fistulas that often require weeks to mature before they can be used for dialysis.

Breakup by Raw Material:

Polytetrafluoroethylene (PTFE)

Polyester

Polyurethane

Biosynthetic

Polytetrafluoroethylene (PTFE) holds the largest share in the market

A detailed breakup and analysis of the market based on the raw material has also been provided in the report. This includes polytetrafluoroethylene (PTFE), polyester, polyurethane, and biosynthetic. According to the report, polytetrafluoroethylene (PTFE) accounted for the largest market share. Polytetrafluoroethylene (PTFE) is a type of synthetic fluoropolymer that is frequently used as a raw material in the manufacture of vascular grafts. It is known for its chemical inertness, biocompatibility, and low friction coefficient, which makes it a suitable material for medical applications. It is particularly popular for use in hemodialysis access grafts. PTFE grafts are often ready for immediate use after implantation, unlike some other types of grafts that require time to mature.

Polyester is another widely used synthetic material in the construction of vascular grafts, particularly in applications like aortic and peripheral vascular bypass surgeries. Often sold under the brand name Dacron, polyester vascular grafts have been used for several decades and have a well-established safety and efficacy profile. Polyester is known for its excellent mechanical properties, including tensile strength and durability, which makes it a preferred choice for long-term implantation. It also possesses good biocompatibility and allows for tissue ingrowth, which helps in anchoring the graft securely in place over time.

Breakup by Application:

Cardiac Aneurysm

Kidney Failure

Vascular Occlusion

Coronary Artery Disease

Cardiac aneurysm dominates the market

The report has provided a detailed breakup and analysis of the market based on the application. This includes cardiac aneurysm, kidney failure, vascular occlusion, and coronary artery disease. According to the report, cardiac aneurysm represented the largest segment. Vascular grafts have a critical role in the treatment of cardiac aneurysms, which are localized, abnormal bulges that occur in the wall of heart chambers or arteries. The use of vascular grafts in this context aims to bypass or replace the weakened section of the blood vessel or heart wall, thus preventing rupture and subsequent life-threatening events. In surgeries, such as coronary artery bypass grafting (CABG), graft materials like polyester or PTFE can be used to reroute blood flow around blocked or compromised arteries, thus restoring adequate blood supply to heart muscles.

In the context of kidney failure, vascular grafts are commonly used to create a functional access point for hemodialysis. When a kidney fails of a patient to adequately filter blood, hemodialysis becomes necessary to remove waste products. Reliable vascular access is crucial for this process. Hemodialysis access grafts, often made from PTFE, are used to surgically connect an artery to a vein, usually in the arm. This connection, known as an arteriovenous (AV) graft, provides a high-flow circuit that facilitates efficient blood removal and return during dialysis sessions. These grafts are particularly useful for patients who cannot use an arteriovenous fistula, either due to poor vein quality or other medical considerations.

Breakup by End User:

Hospitals

Ambulatory Surgical Centers (ASCs)

Hospitals hold the largest share in the market

A detailed breakup and analysis of the market based on the end user has also been provided in the report. This includes hospitals and ambulatory surgical centers (ASCs). According to the report, hospitals accounted for the largest market share. Hospitals are one of the primary end users of vascular grafts. In a hospital setting, vascular grafts are utilized in a variety of surgical procedures including coronary artery bypass grafting (CABG), treatment of aneurysms, and peripheral artery disease interventions. Hospitals often have the comprehensive medical infrastructure, including specialized surgical units, advanced diagnostic equipment, and postoperative care facilities, that allow for the successful implantation and maintenance of these grafts. Given the complexity of many vascular surgeries and the need for specialized medical personnel, such as cardiovascular surgeons and interventional radiologists, hospitals are well-suited to be major end users of vascular grafts.

Ambulatory surgical centers (ASCs) also serve as significant end users of vascular grafts, although their scope may be more limited as compared to hospitals. ASCs are healthcare facilities wherein surgeries that do not require an overnight hospital stay are performed. Due to advancements in minimally invasive surgical (MIS) techniques, certain procedures involving vascular grafts, such as some types of endovascular stent placements, can now be conducted in these settings. ASCs offer the advantage of quicker patient turnover, lower cost, and a more streamlined patient experience.

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 vascular grafts

Vascular Grafts Market Report by Product (Endovascular Stent Grafts, Hemodialysis Access Grafts, Coronary Arte...

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 surging prevalence of diabetes among the masses represents one of the primary factors bolstering the market growth in the North American region. Moreover, the rising adoption of cutting-edge diagnostic technologies like AI and advanced imaging is contributing to the market growth in the region. Besides this, the growing preference for MI surgeries is influencing the market positively.

Competitive Landscape:

The leading companies are developing bioengineered and drug-eluting grafts that aim to mitigate these drawbacks by incorporating living cells or biological molecules to improve biocompatibility and encourage tissue integration. They are also coated with pharmaceutical agents that are slowly released into the bloodstream, which reduces the risk of clot formation and vessel narrowing post-surgery. Moreover, key players are adopting the use of 3D printing technologies to create custom vascular grafts that match the specific anatomical needs of individual patients and reduce the risk of complications that can arise from ill-fitting grafts. They are also utilizing nanotechnology to offer unique mechanical and biological properties, which include better flexibility and reduced thrombogenicity.

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:

Abbott Laboratories

B. Braun SE (B. Braun Holding GmbH & Co. KG)

Becton, Dickinson and Company

Cook Group Incorporated

Cordis

CryoLife Inc.

Getinge AB

Heat Medical Europe BV

LeMaitre Vascular

Medtronic plc

Terumo Corporation

W. L. Gore & Associates Inc.

Recent Developments:

In 2021, Terumo Corporation announced about the approval of US Food and Drug Administration (FDA) for the TREO™ Abdominal Aortic Stent-Graft System for sale in the United States. It assists in the treatment of patients with abdominal aortic aneurysms (AAA).

In 2023, Abbott Laboratories recently acquired Cardiovascular Systems, Inc., which is a medical device company with an innovative atherectomy system used in treating peripheral and coronary artery disease.

In 2022, B. Braun SE (B. Braun Holding GmbH & Co. KG) acquired the innovative Clik-FIX catheter securement device portfolio from Starboard Medical, Inc. to expand their product portfolio.

Key Questions Answered in This Report

1. How big is the global vascular grafts market?
2. What is the expected growth rate of the global vascular grafts market during

2024-2032?

3. What are the key factors driving the global vascular grafts market?
4. What has been the impact of COVID-19 on the global vascular grafts market?
5. What is the breakup of the global vascular grafts market based on the product?
6. What is the breakup of the global vascular grafts market based on the raw material?
7. What is the breakup of the global vascular grafts market based on the application?
8. What is the breakup of the global vascular grafts market based on the end user?
9. What are the key regions in the global vascular grafts market?
10. Who are the key players/companies in the global vascular grafts market?

Contents

1 PREFACE

2 SCOPE AND METHODOLOGY

- 2.1 Objectives of the Study
- 2.2 Stakeholders
- 2.3 Data Sources
 - 2.3.1 Primary Sources
 - 2.3.2 Secondary Sources
- 2.4 Market Estimation
 - 2.4.1 Bottom-Up Approach
 - 2.4.2 Top-Down Approach
- 2.5 Forecasting Methodology

3 EXECUTIVE SUMMARY

4 INTRODUCTION

- 4.1 Overview
- 4.2 Key Industry Trends

5 GLOBAL VASCULAR GRAFTS MARKET

- 5.1 Market Overview
- 5.2 Market Performance
- 5.3 Impact of COVID-19
- 5.4 Market Forecast

6 MARKET BREAKUP BY PRODUCT

- 6.1 Endovascular Stent Grafts
 - 6.1.1 Market Trends
 - 6.1.2 Market Forecast
- 6.2 Hemodialysis Access Grafts
 - 6.2.1 Market Trends
 - 6.2.2 Market Forecast
- 6.3 Coronary Artery By-Pass Grafts

- 6.3.1 Market Trends
- 6.3.2 Market Forecast
- 6.4 Vascular Grafts for Aorta Disease
 - 6.4.1 Market Trends
 - 6.4.2 Market Forecast
- 6.5 Peripheral Vascular Grafts
 - 6.5.1 Market Trends
 - 6.5.2 Market Forecast

7 MARKET BREAKUP BY RAW MATERIAL

- 7.1 Polytetrafluoroethylene (PTFE)
 - 7.1.1 Market Trends
 - 7.1.2 Market Forecast
- 7.2 Polyester
 - 7.2.1 Market Trends
 - 7.2.2 Market Forecast
- 7.3 Polyurethane
 - 7.3.1 Market Trends
 - 7.3.2 Market Forecast
- 7.4 Biosynthetic
 - 7.4.1 Market Trends
 - 7.4.2 Market Forecast

8 MARKET BREAKUP BY APPLICATION

- 8.1 Cardiac Aneurysm
 - 8.1.1 Market Trends
 - 8.1.2 Market Forecast
- 8.2 Kidney Failure
 - 8.2.1 Market Trends
 - 8.2.2 Market Forecast
- 8.3 Vascular Occlusion
 - 8.3.1 Market Trends
 - 8.3.2 Market Forecast
- 8.4 Coronary Artery Disease
 - 8.4.1 Market Trends
 - 8.4.2 Market Forecast

9 MARKET BREAKUP BY END USER

9.1 Hospitals

9.1.1 Market Trends

9.1.2 Market Forecast

9.2 Ambulatory Surgical Centers (ASCs)

9.2.1 Market Trends

9.2.2 Market Forecast

10 MARKET BREAKUP BY REGION

10.1 North America

10.1.1 United States

10.1.1.1 Market Trends

10.1.1.2 Market Forecast

10.1.2 Canada

10.1.2.1 Market Trends

10.1.2.2 Market Forecast

10.2 Asia-Pacific

10.2.1 China

10.2.1.1 Market Trends

10.2.1.2 Market Forecast

10.2.2 Japan

10.2.2.1 Market Trends

10.2.2.2 Market Forecast

10.2.3 India

10.2.3.1 Market Trends

10.2.3.2 Market Forecast

10.2.4 South Korea

10.2.4.1 Market Trends

10.2.4.2 Market Forecast

10.2.5 Australia

10.2.5.1 Market Trends

10.2.5.2 Market Forecast

10.2.6 Indonesia

10.2.6.1 Market Trends

10.2.6.2 Market Forecast

10.2.7 Others

10.2.7.1 Market Trends

- 10.2.7.2 Market Forecast
- 10.3 Europe
 - 10.3.1 Germany
 - 10.3.1.1 Market Trends
 - 10.3.1.2 Market Forecast
 - 10.3.2 France
 - 10.3.2.1 Market Trends
 - 10.3.2.2 Market Forecast
 - 10.3.3 United Kingdom
 - 10.3.3.1 Market Trends
 - 10.3.3.2 Market Forecast
 - 10.3.4 Italy
 - 10.3.4.1 Market Trends
 - 10.3.4.2 Market Forecast
 - 10.3.5 Spain
 - 10.3.5.1 Market Trends
 - 10.3.5.2 Market Forecast
 - 10.3.6 Russia
 - 10.3.6.1 Market Trends
 - 10.3.6.2 Market Forecast
 - 10.3.7 Others
 - 10.3.7.1 Market Trends
 - 10.3.7.2 Market Forecast
- 10.4 Latin America
 - 10.4.1 Brazil
 - 10.4.1.1 Market Trends
 - 10.4.1.2 Market Forecast
 - 10.4.2 Mexico
 - 10.4.2.1 Market Trends
 - 10.4.2.2 Market Forecast
 - 10.4.3 Others
 - 10.4.3.1 Market Trends
 - 10.4.3.2 Market Forecast
- 10.5 Middle East and Africa
 - 10.5.1 Market Trends
 - 10.5.2 Market Breakup by Country
 - 10.5.3 Market Forecast

11 SWOT ANALYSIS

- 11.1 Overview
- 11.2 Strengths
- 11.3 Weaknesses
- 11.4 Opportunities
- 11.5 Threats

12 VALUE CHAIN ANALYSIS

13 PORTERS FIVE FORCES ANALYSIS

- 13.1 Overview
- 13.2 Bargaining Power of Buyers
- 13.3 Bargaining Power of Suppliers
- 13.4 Degree of Competition
- 13.5 Threat of New Entrants
- 13.6 Threat of Substitutes

14 PRICE ANALYSIS

15 COMPETITIVE LANDSCAPE

- 15.1 Market Structure
- 15.2 Key Players
- 15.3 Profiles of Key Players
 - 15.3.1 Abbott Laboratories
 - 15.3.1.1 Company Overview
 - 15.3.1.2 Product Portfolio
 - 15.3.1.3 Financials
 - 15.3.1.4 SWOT Analysis
 - 15.3.2 B. Braun SE (B. Braun Holding GmbH & Co. KG)
 - 15.3.2.1 Company Overview
 - 15.3.2.2 Product Portfolio
 - 15.3.3 Becton, Dickinson and Company
 - 15.3.3.1 Company Overview
 - 15.3.3.2 Product Portfolio
 - 15.3.3.3 Financials
 - 15.3.3.4 SWOT Analysis
 - 15.3.4 Cook Group Incorporated

- 15.3.4.1 Company Overview
- 15.3.4.2 Product Portfolio
- 15.3.5 Cordis
 - 15.3.5.1 Company Overview
 - 15.3.5.2 Product Portfolio
- 15.3.6 CryoLife Inc.
 - 15.3.6.1 Company Overview
 - 15.3.6.2 Product Portfolio
- 15.3.7 Getinge AB
 - 15.3.7.1 Company Overview
 - 15.3.7.2 Product Portfolio
- 15.3.8 Heat Medical Europe BV
 - 15.3.8.1 Company Overview
 - 15.3.8.2 Product Portfolio
- 15.3.9 LeMaitre Vascular
 - 15.3.9.1 Company Overview
 - 15.3.9.2 Product Portfolio
- 15.3.10 Medtronic plc
 - 15.3.10.1 Company Overview
 - 15.3.10.2 Product Portfolio
- 15.3.11 Terumo Corporation
 - 15.3.11.1 Company Overview
 - 15.3.11.2 Product Portfolio
- 15.3.12 W. L. Gore & Associates Inc.
 - 15.3.12.1 Company Overview
 - 15.3.12.2 Product Portfolio

List Of Tables

LIST OF TABLES

Table 1: Global: Vascular Grafts Market: Key Industry Highlights, 2023 and 2032

Table 2: Global: Vascular Grafts Market Forecast: Breakup by Product (in Million US\$), 2024-2032

Table 3: Global: Vascular Grafts Market Forecast: Breakup by Raw Material (in Million US\$), 2024-2032

Table 4: Global: Vascular Grafts Market Forecast: Breakup by Application (in Million US\$), 2024-2032

Table 5: Global: Vascular Grafts Market Forecast: Breakup by End User (in Million US\$), 2024-2032

Table 6: Global: Vascular Grafts Market Forecast: Breakup by Region (in Million US\$), 2024-2032

Table 7: Global: Vascular Grafts Market: Competitive Structure

Table 8: Global: Vascular Grafts Market: Key Players

List Of Figures

LIST OF FIGURES

Figure 1: Global: Vascular Grafts Market: Major Drivers and Challenges

Figure 2: Global: Vascular Grafts Market: Sales Value (in Billion US\$), 2018-2023

Figure 3: Global: Vascular Grafts Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 4: Global: Vascular Grafts Market: Breakup by Product (in %), 2023

Figure 5: Global: Vascular Grafts Market: Breakup by Raw Material (in %), 2023

Figure 6: Global: Vascular Grafts Market: Breakup by Application (in %), 2023

Figure 7: Global: Vascular Grafts Market: Breakup by End User (in %), 2023

Figure 8: Global: Vascular Grafts Market: Breakup by Region (in %), 2023

Figure 9: Global: Vascular Grafts (Endovascular Stent Grafts) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 10: Global: Vascular Grafts (Endovascular Stent Grafts) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 11: Global: Vascular Grafts (Hemodialysis Access Grafts) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 12: Global: Vascular Grafts (Hemodialysis Access Grafts) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 13: Global: Vascular Grafts (Coronary Artery By-Pass Grafts) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 14: Global: Vascular Grafts (Coronary Artery By-Pass Grafts) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 15: Global: Vascular Grafts (Vascular Grafts for Aorta Disease) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 16: Global: Vascular Grafts (Vascular Grafts for Aorta Disease) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 17: Global: Vascular Grafts (Peripheral Vascular Grafts) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 18: Global: Vascular Grafts (Peripheral Vascular Grafts) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 19: Global: Vascular Grafts (Polytetrafluoroethylene (PTFE)) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 20: Global: Vascular Grafts (Polytetrafluoroethylene (PTFE)) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 21: Global: Vascular Grafts (Polyester) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 22: Global: Vascular Grafts (Polyester) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 23: Global: Vascular Grafts (Polyurethane) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 24: Global: Vascular Grafts (Polyurethane) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 25: Global: Vascular Grafts (Biosynthetic) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 26: Global: Vascular Grafts (Biosynthetic) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 27: Global: Vascular Grafts (Cardiac Aneurysm) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 28: Global: Vascular Grafts (Cardiac Aneurysm) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 29: Global: Vascular Grafts (Kidney Failure) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 30: Global: Vascular Grafts (Kidney Failure) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 31: Global: Vascular Grafts (Vascular Occlusion) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 32: Global: Vascular Grafts (Vascular Occlusion) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 33: Global: Vascular Grafts (Coronary Artery Disease) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 34: Global: Vascular Grafts (Coronary Artery Disease) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 35: Global: Vascular Grafts (Hospitals) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 36: Global: Vascular Grafts (Hospitals) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 37: Global: Vascular Grafts (Ambulatory Surgical Centers (ASCs)) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 38: Global: Vascular Grafts (Ambulatory Surgical Centers (ASCs)) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 39: North America: Vascular Grafts Market: Sales Value (in Million US\$), 2018 & 2023

Figure 40: North America: Vascular Grafts Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 41: United States: Vascular Grafts Market: Sales Value (in Million US\$), 2018 &

2023

Figure 42: United States: Vascular Grafts Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 43: Canada: Vascular Grafts Market: Sales Value (in Million US\$), 2018 & 2023

Figure 44: Canada: Vascular Grafts Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 45: Asia-Pacific: Vascular Grafts Market: Sales Value (in Million US\$), 2018 & 2023

Figure 46: Asia-Pacific: Vascular Grafts Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 47: China: Vascular Grafts Market: Sales Value (in Million US\$), 2018 & 2023

Figure 48: China: Vascular Grafts Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 49: Japan: Vascular Grafts Market: Sales Value (in Million US\$), 2018 & 2023

Figure 50: Japan: Vascular Grafts Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 51: India: Vascular Grafts Market: Sales Value (in Million US\$), 2018 & 2023

Figure 52: India: Vascular Grafts Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 53: South Korea: Vascular Grafts Market: Sales Value (in Million US\$), 2018 & 2023

Figure 54: South Korea: Vascular Grafts Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 55: Australia: Vascular Grafts Market: Sales Value (in Million US\$), 2018 & 2023

Figure 56: Australia: Vascular Grafts Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 57: Indonesia: Vascular Grafts Market: Sales Value (in Million US\$), 2018 & 2023

Figure 58: Indonesia: Vascular Grafts Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 59: Others: Vascular Grafts Market: Sales Value (in Million US\$), 2018 & 2023

Figure 60: Others: Vascular Grafts Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 61: Europe: Vascular Grafts Market: Sales Value (in Million US\$), 2018 & 2023

Figure 62: Europe: Vascular Grafts Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 63: Germany: Vascular Grafts Market: Sales Value (in Million US\$), 2018 & 2023

Figure 64: Germany: Vascular Grafts Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 65: France: Vascular Grafts Market: Sales Value (in Million US\$), 2018 & 2023

Figure 66: France: Vascular Grafts Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 67: United Kingdom: Vascular Grafts Market: Sales Value (in Million US\$), 2018 & 2023

Figure 68: United Kingdom: Vascular Grafts Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 69: Italy: Vascular Grafts Market: Sales Value (in Million US\$), 2018 & 2023

Figure 70: Italy: Vascular Grafts Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 71: Spain: Vascular Grafts Market: Sales Value (in Million US\$), 2018 & 2023

Figure 72: Spain: Vascular Grafts Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 73: Russia: Vascular Grafts Market: Sales Value (in Million US\$), 2018 & 2023

Figure 74: Russia: Vascular Grafts Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 75: Others: Vascular Grafts Market: Sales Value (in Million US\$), 2018 & 2023

Figure 76: Others: Vascular Grafts Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 77: Latin America: Vascular Grafts Market: Sales Value (in Million US\$), 2018 & 2023

Figure 78: Latin America: Vascular Grafts Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 79: Brazil: Vascular Grafts Market: Sales Value (in Million US\$), 2018 & 2023

Figure 80: Brazil: Vascular Grafts Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 81: Mexico: Vascular Grafts Market: Sales Value (in Million US\$), 2018 & 2023

Figure 82: Mexico: Vascular Grafts Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 83: Others: Vascular Grafts Market: Sales Value (in Million US\$), 2018 & 2023

Figure 84: Others: Vascular Grafts Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 85: Middle East and Africa: Vascular Grafts Market: Sales Value (in Million US\$), 2018 & 2023

Figure 86: Middle East and Africa: Vascular Grafts Market: Breakup by Country (in %), 2023

Figure 87: Middle East and Africa: Vascular Grafts Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 88: Global: Vascular Grafts Industry: SWOT Analysis

Figure 89: Global: Vascular Grafts Industry: Value Chain Analysis

Figure 90: Global: Vascular Grafts Industry: Porter's Five Forces Analysis

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