

Viscosupplementation Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application, Product Type

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Abstracts

Viscosupplementation Market Summary

Introduction

Viscosupplementation is a minimally invasive medical procedure involving the injection of hyaluronic acid (HA)-based solutions into joints, primarily to treat osteoarthritis (OA), a degenerative joint disease affecting approximately 528 million people globally in 2019, according to the World Health Organization, with a 113% increase since 1990. The procedure enhances the viscosity of synovial fluid, reducing friction, alleviating pain, and improving joint mobility, particularly for knee, hip, and hand osteoarthritis. About 73% of OA patients are over 55, with 60% being female, and 344 million individuals with moderate to severe OA could benefit from such treatments, with knee OA affecting 365 million people. Viscosupplementation is segmented into single-injection, three-injection, and five-injection regimens, with applications across hospitals, ambulatory surgical centers (ASCs), and orthopedic clinics. The market is driven by an aging global population, rising prevalence of obesity-related OA, and growing preference for non-surgical treatments. North America leads due to advanced healthcare infrastructure, while Asia Pacific grows rapidly due to increasing OA cases and healthcare investments. Emerging trends include advanced HA formulations with cross-linking technology for longer-lasting effects, combination therapies, and single-injection products to enhance patient compliance. Challenges include high treatment costs, limited insurance coverage in some regions, and competition from alternative therapies like corticosteroids and platelet-rich plasma (PRP).

Market Size and Growth Forecast

Viscosupplementation Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Te...

The global viscosupplementation market is projected to reach USD 4.0–5.0 billion by 2025, with an estimated compound annual growth rate (CAGR) of 7%–9% through 2030. This growth is fueled by the increasing prevalence of osteoarthritis, advancements in HA-based therapies, and rising demand for minimally invasive treatments, particularly in aging populations and emerging markets.

Regional Analysis

North America is expected to lead the viscosupplementation market with a growth rate of 6.5%–8.5%, driven by the United States and Canada. The U.S. benefits from a robust healthcare system, high OA prevalence (32.5 million affected in 2020 per the CDC), and strong adoption of innovative treatments like single-injection viscosupplements. Canada's aging population and focus on non-surgical interventions support steady demand, with trends emphasizing outpatient procedures.

Asia Pacific follows with a growth rate of 8%–10%, led by China, Japan, and India. China's market is propelled by a rapidly aging population, increasing OA cases, and government healthcare investments, with companies like LG Chem expanding through products like Synovian. Japan's advanced medical infrastructure and high hand OA prevalence (up to 92% per radiological studies) drive demand for three-injection regimens. India's growing middle class and healthcare access fuel adoption, particularly in urban centers.

Europe, with a growth rate of 6%–8%, is driven by Germany, France, and the UK. Germany's orthopedic sector emphasizes viscosupplementation for knee and hip OA, while France benefits from favorable reimbursement policies (up to 65% for certain HA products). The UK focuses on cost-effective outpatient treatments, with trends favoring single-injection solutions.

South America, with a growth rate of 5.5%–7.5%, sees demand in Brazil and Argentina, driven by rising OA awareness and healthcare improvements. Brazil's expanding private healthcare sector supports adoption, though limited insurance coverage poses constraints.

The Middle East and Africa, with a growth rate of 5%–7%, are led by the UAE and South Africa. The UAE's medical tourism and advanced clinics drive demand, while South Africa's growing OA patient pool supports adoption. Limited healthcare infrastructure hinders broader growth.

Application Analysis

Hospitals: Expected to grow at 6.5%–8.5%, hospitals dominate due to their advanced infrastructure and ability to handle complex OA cases. Trends include integration with combination therapies and partnerships with manufacturers for cost-effective HA solutions.

Ambulatory Surgical Centers (ASCs): With a growth rate of 7%–9%, ASCs are favored for their convenience, lower costs, and faster scheduling. Trends focus on single-injection treatments to reduce patient visits and enhance compliance, particularly in North America and Europe.

Orthopedic Clinics: Projected to grow at 6%–8%, these clinics cater to specialized OA care, emphasizing personalized treatment plans. Trends include adoption of advanced HA formulations and AI-driven diagnostics for precise injections.

Type Analysis

Three Injection: Expected to grow at 6.5%–8.5%, this segment leads due to its established clinical efficacy and widespread use for moderate OA. Trends focus on cross-linked HA formulations for prolonged pain relief, with products like Sanofi's Synvisc and OrthogenRx's TriVisc gaining traction.

Single Injection: With a growth rate of 7.5%–9.5%, single-injection products like Anika's MONOVISC and Bioventus's DUROLANE are gaining popularity for their convenience, fewer hospital visits, and reduced side effects. Trends emphasize next-generation HA with enhanced biocompatibility.

Five Injection: Projected to grow at 5.5%–7.5%, this segment serves patients requiring extended treatment courses, particularly for severe OA. Trends focus on niche applications in smaller markets, though adoption is declining due to longer regimens.

Key Market Players

Sanofi: A French pharmaceutical giant, Sanofi develops HA-based viscosupplements like Synvisc-One, targeting knee OA with single-injection solutions for global markets.

Seikagaku Corporation: A Japanese company, Seikagaku specializes in HA-based

products like HyLink and JOYCLU, focusing on single- and three-injection regimens for knee OA.

Bioventus: A U.S. firm, Bioventus offers DUROLANE, a single-injection HA product, emphasizing pain relief and mobility improvement for OA patients worldwide.

Ferring Pharmaceuticals: A Swiss company, Ferring produces HA-based viscosupplements for knee and hip OA, focusing on innovative formulations for enhanced joint lubrication.

Anika Therapeutics: A U.S. manufacturer, Anika develops single-injection products like MONOVISC and combination therapies like Cingal, targeting knee and cartilage repair.

Chugai Pharmaceuticals: A Japanese firm, Chugai focuses on HA-based injections for OA, leveraging partnerships to expand in Asia Pacific markets.

OrthogenRx: A U.S. company, OrthogenRx offers TriVisc and GenVisc850, three-injection viscosupplements for knee OA, emphasizing affordability and accessibility.

LG Chem: A South Korean company, LG Chem produces Synovian, a single-injection HA treatment for OA, targeting cost-sensitive markets like China.

Fidia Farmaceutici: An Italian firm, Fidia develops TRILURON and other HA-based viscosupplements, focusing on knee OA and cartilage repair solutions.

Hyaltech: A UK company, Hyaltech specializes in high-quality HA formulations for viscosupplementation, targeting orthopedic clinics and ASCs in Europe.

Porter's Five Forces Analysis

Threat of New Entrants: Moderate. The viscosupplementation market has high barriers, including significant R&D costs for HA formulations and stringent regulatory approvals (e.g., FDA Class III device status). Established players like Sanofi and Bioventus dominate, but new entrants offering innovative single-injection products can emerge, slightly increasing the threat.

Threat of Substitutes: Moderate. Alternatives like corticosteroid injections, PRP therapy, and surgical interventions (e.g., knee replacement) compete with viscosupplementation. However, HA's minimally invasive nature and favorable

safety profile reduce substitution risks, particularly for early-stage OA patients.

Bargaining Power of Buyers: Moderate to High. Hospitals, ASCs, and clinics have negotiating power due to multiple vendors and standardized HA products. However, advanced formulations like cross-linked HA limit switching options, balancing buyer power.

Bargaining Power of Suppliers: Moderate. Suppliers of HA raw materials and medical-grade components hold some leverage, but global supply chains and competition among biotech firms reduce their power.

Competitive Rivalry: High. The market is highly competitive, with players like Sanofi, Seikagaku, and Anika competing on innovation, efficacy, and distribution networks. Mergers, acquisitions (e.g., Avanos acquiring OrthogenRx in 2021), and product launches intensify rivalry, particularly in the single-injection segment.

Market Opportunities and Challenges

Opportunities

Rising OA Prevalence: The global increase in OA cases (528 million in 2019, per WHO) drives demand for viscosupplementation, particularly in aging populations in North America and Asia Pacific.

Single-Injection Advancements: Innovations in single-injection products, like Bioventus's DUROLANE and Anika's Cingal, offer convenience and improved patient compliance, boosting adoption.

Emerging Market Growth: Rapid healthcare investments in China, India, and the UAE create opportunities for affordable HA-based treatments, especially in ASCs and clinics.

Combination Therapies: Combining HA with steroids or regenerative therapies (e.g., Anika's Hyalofast) enhances efficacy, appealing to patients seeking non-surgical options.

Favorable Reimbursement: Policies in regions like France (65% coverage for

HA products) and expanding insurance in emerging markets improve accessibility, driving demand.

Challenges

High Treatment Costs: Viscosupplementation therapies, especially single-injection products, are expensive, limiting adoption in cost-sensitive markets like South America and Africa.

Limited Insurance Coverage: Inconsistent reimbursement policies in some regions (e.g., limited Medicaid coverage in the U.S.) restrict patient access, particularly for SMBs.

Competition from Alternatives: Corticosteroids, PRP, and surgical options challenge market growth, especially in severe OA cases where surgery is preferred.

Regulatory Hurdles: Stringent FDA and EMA approvals for HA-based devices increase development costs and delay product launches, impacting smaller players.

Supply Chain Risks: Dependency on HA raw materials and biotech suppliers exposes the market to shortages and geopolitical disruptions.

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