

Viscosupplementation Market Forecasts to 2030 – Global Analysis By Product Type (Hyaluronic Acid (HA) Injections, Non-Hyaluronic Acid Products and Other Product Types), Source, Distribution Channel, Application and By Geography

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Abstracts

According to Statistics MRC, the Global Viscosupplementation Market is accounted for \$5.4 billion in 2024 and is expected to reach \$10.5 billion by 2030 growing at a CAGR of 11.5% during the forecast period. Viscosupplementation is a medical treatment for osteoarthritis (OA), primarily in the knee that involves injecting a gel-like substance, typically hyaluronic acid (HA), into the affected joint to supplement the natural synovial fluid. HA helps reduce pain and improve mobility by restoring the fluid's lubricating properties. This treatment is often used when conservative measures like pain medications or physical therapy have not provided sufficient relief. The procedure is minimally invasive, requiring just a few injections spaced over several weeks.

According to an article published by the Centers for Disease Control and Prevention in April 2020, titled 'Osteoarthritis', about 32.5 million people in the United States are suffering from osteoarthritis. In addition to this, 62% of women suffer from osteoarthritis.

Market Dynamics:

Driver:

Rising incidence of osteoarthritis

Osteoarthritis is becoming more prevalent, especially in weight-bearing joints like the knee. The increasing number of people suffering from this condition is creating a

growing demand for effective treatment options. Viscosupplementation, offering a non-invasive alternative to surgery, has gained popularity as an option to alleviate symptoms and improve joint mobility. With osteoarthritis affecting millions, the need for reliable therapies, such as viscosupplementation, will continue to expand during the forecast period.

Restraint:

Lack of reimbursement policies

The high cost of the treatment and limited insurance coverage can hinder patient access to viscosupplementation injections. The absence of comprehensive reimbursement options may deter patients from opting for the procedure, especially in areas with stricter healthcare policies. This cost-related barrier can slow the widespread adoption of viscosupplementation as a treatment for osteoarthritis. Overcoming these reimbursement challenges will be crucial to ensuring broader market penetration.

Opportunity:

Increasing adoption of minimally invasive procedures

As patients and healthcare providers prioritize less invasive treatment options with quicker recovery times, viscosupplementation offers a compelling alternative to traditional surgical interventions. The procedure's non-invasive nature, coupled with its potential to reduce pain and improve mobility, positions it as a favorable choice for managing osteoarthritis. With the growing trend toward outpatient, minimally invasive procedures, viscosupplementation is expected to gain further traction, expanding its market share.

Threat:

Potential for adverse reactions

Viscosupplementation procedure can lead to side effects such as joint pain, swelling, or infection. The risk of these reactions may discourage some patients from choosing viscosupplementation as a treatment option. Additionally, adverse reactions, if not properly managed, could negatively impact the reputation of the treatment, creating hesitancy among both patients and healthcare providers. Addressing safety concerns and improving patient education is essential for minimizing this threat.

Covid-19 Impact

The Covid-19 pandemic had a mixed impact on the viscosupplementation market. On one hand, lockdowns and healthcare resource reallocations slowed elective procedures, including viscosupplementation injections, due to restricted access to clinics. On the other hand, the pandemic highlighted the importance of non-surgical treatments for managing chronic conditions like osteoarthritis, leading to a rebound in demand as healthcare systems adapted. With a growing focus on reducing hospital visits and promoting outpatient care, viscosupplementation may see sustained growth as a preferred treatment in the post-pandemic era.

The hyaluronic acid (HA) injections segment is expected to be the largest during the forecast period

The hyaluronic acid (HA) injections segment is expected to account for the largest market share during the forecast period owing to its ability to restore synovial fluid, providing lubrication and reducing inflammation in osteoarthritis -affected joints. Its proven effectiveness and long-standing use in viscosupplementation have made it the preferred choice for both patients and healthcare providers. As the most established and widely used form of viscosupplementation, the HA injections segment is anticipated to dominate the market in the coming years.

The non-animal source segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the non-animal source segment is predicted to witness the highest growth rate due to increasing concerns over the potential risks of animal-derived products, non-animal-based hyaluronic acid offers a more attractive option for patients. These products cater to individuals who may have allergies or ethical concerns related to animal-based treatments. The demand for non-animal sourced viscosupplementation products is rising as they are perceived to be safer and more sustainable, offering manufacturers a growing opportunity to expand their market reach and meet consumer preferences.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share owing to high awareness of osteoarthritis treatments, and significant

healthcare spending. With a strong preference for non-invasive treatments like viscosupplementation, North America's large aging population will drive continued demand. Furthermore, the presence of leading manufacturers and research institutions in the United States and Canada will support innovation and the growth of the viscosupplementation market throughout the forecast period.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR driven by rapid urbanization, increasing healthcare access, and a growing elderly population are contributing to the rising prevalence of osteoarthritis in this region. Countries like China, India, and Japan are seeing greater adoption of viscosupplementation due to rising healthcare awareness and improved medical facilities.

Key players in the market

Some of the key players in Viscosupplementation market include Anika Therapeutics, Inc., Aptissen, Bioventus LLC, Chugai Pharmaceuticals Co., Ltd., DePuy Synthes, F.Hoffmann-La Roche Ltd., Ferring Pharmaceuticals B.V., Fidia Farmaceutici S.p.A, Johnson & Johnson Services, Inc., LG Life Sciences Ltd., Lifecore Biomedical, OrthogenRx Inc., Sanofi, Seikagaku Corp., Smith & Nephew PLC and Zimmer Biomet.

Key Developments:

In November 2024, Roche announced that it has entered into a definitive merger agreement to acquire Poseida Therapeutics, Inc. a public clinical-stage biopharmaceutical company pioneering donor-derived CAR-T cell therapies.

In December 2024, Smith+Nephew announced its CORIOGRAPH Pre-Op Planning and Modeling Services are now cleared for total hip arthroplasty (THA) by the United States Food and Drug Administration.

Product Types Covered:

Hyaluronic Acid (HA) Injections

Non-Hyaluronic Acid Products

Other Product Types

Sources Covered:

Animal Source

Non-Animal Source

Distribution Channels Covered:

Direct Sales

Clinics

Retail Pharmacies & Drugstores

Online Pharmacies & E-commerce Platforms

Other Distribution Channels

Applications Covered:

Osteoarthritis

Post-Traumatic Arthritis

Rheumatoid Arthritis

Knee Osteoarthritis

Other Applications

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2022, 2023, 2024, 2026, and 2030
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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