

# **Organ Transplant Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028**

## **Segmented By Product (Tissue Products, Organ Preservation Products, Transplant Diagnostics, Immunosuppressant Drugs, Others), By Application (Organ Transplantation, Tissue Transplantation), By Type of Transplant (Autograft, Allograft, Others), By End User (Hospitals, Transplant Centers, Others), By Region and Competition**

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### **Abstracts**

The Global Organ Transplant Market reached a valuation of USD 14.56 Billion in 2022 and is expected to experience substantial growth during the forecast period, with a projected Compound Annual Growth Rate (CAGR) of 8.93% and expected to reach USD 24.17 Billion through 2028. The organ transplantation market primarily revolves around the intricate process of transplanting organs. Organ transplantation is a medical procedure where an organ is extracted from one individual and implanted into another to address organ failure, bridge gaps, or replace damaged or missing organs. This procedure is commonly utilized to treat organ failure in critical organs such as the lungs, kidneys, liver, and others. The most common candidates for organ transplantation are individuals with brain death but possessing healthy organs that can potentially save another person's life. Before embarking on this complex procedure, obtaining patient or family consent is crucial, as harvesting organs without consent is considered unlawful and ethically wrong.

The organ transplant market pertains to the healthcare industry sector dedicated to the transplantation of organs and tissues from one individual (donor) to another (recipient)

to replace a malfunctioning or damaged organ. Organ transplantation is a multifaceted medical procedure designed to enhance the quality of life and extend the lifespan of individuals with organ failure or specific medical conditions. The market encompasses various aspects related to organ transplantation, including organ procurement, preservation, transplantation surgery, post-operative care, and ongoing management.

## Key Market Drivers

### 1. Escalating Organ Failures and Organ Donation Procedures:

Over the past decade, the demand for organ transplantation has been steadily increasing worldwide. This can be attributed to the heightened prevalence of vital organ failure, improved success rates in transplantation, and better post-transplant outcomes. The incidence of organ failure has also risen due to factors such as alcohol consumption, substance abuse, and unhealthy diets leading to chronic diseases affecting crucial organs such as the lungs, kidneys, and liver. Organ transplantations have become life-saving measures for patients, thus driving the expansion of the transplantation market. Moreover, technological advancements in transplantation methods are contributing to the overall revenue growth of the market.

### 2. Surge in the Demand for Transplant Organs:

The global upswing in demand for transplant organs can be attributed to the increasing occurrence of acute diseases leading to a higher prevalence of organ failures. For example, end-stage renal disease, primarily caused by conditions like diabetes and high blood pressure, necessitates kidney transplants or dialysis as the sole treatment options to sustain patient life. As per the U.S. Department of Health & Human Services, approximately 121,678 patients were awaiting organ transplants in the U.S. in 2019. This substantial demand for advanced transplantation products to address organ failure is propelling market growth.

### 3. Growing Number of Tissue Banks:

The need for tissue transplantation has catalyzed the growth of tissue banks, entities that store biomedical tissues under cryogenic conditions. The rise in burn injuries, for instance, has led to a significant demand for tissue banks specialized in the retrieval and aseptic storage of skin for donation. Technological advancements, including cryopreservation systems and computerized support systems, have significantly

improved the efficiency of tissue preservation. These advancements are making the storage and retrieval of organs more convenient, thus fueling the market's growth.

#### 4. Technological Advancements in Organ Transplant Methods:

Technological breakthroughs in the realm of 3D bioprinting are playing a pivotal role in driving the adoption of organ transplantation. Continuous developments in PCR techniques, including improvements in system design and advanced assays, have greatly enhanced the precision and effectiveness of tissue typing. The groundbreaking technique known as desensitization, developed by John Hopkins University School of Medicine, has revolutionized kidney transplantation by enabling the use of organs from any donor. Additionally, therapeutic hypothermia, utilizing targeted temperature management, has emerged as a critical factor in organ transplantation, safeguarding neurological functions in patients with cardiac arrest, asphyxia, and stroke. The introduction of these advanced techniques has contributed to the growth of the global transplantation market, leading to an increase in the number of organ transplant procedures worldwide.

#### Key Market Challenges

##### Transplant Rejection:

Transplant rejection is a intricate process in which the recipient's immune system launches an attack against the transplanted organ or tissue, recognizing it as foreign. Three common types of rejections include hyper-acute rejection, acute rejection, and chronic rejection. Despite careful donor matching, tissue typing, and the use of immunosuppressive medications, instances of transplant rejection still occur, resulting in organ failure. Non-compliance with immunosuppressive drugs remains a significant contributing factor to rejection. Complications that may arise from transplant rejection include certain types of cancers, infections, impaired function of the transplanted tissue or organ, and adverse effects due to incorrect medication dosages. According to the Organ Procurement and Transplantation Network, approximately 4% of deceased donor kidney transplants experience failure within one year, while living donor kidney transplant recipients face a 14% failure rate at five years post-transplant. Consequently, these factors pose challenges to the growth of the market.

##### Shortage of Organ Donors:

As per the Living Kidney Donors Network, the global number of kidney transplant

recipients exceeded 90,000 in 2017, and this figure is projected to rise in the near future. Traditionally, organs are procured from deceased patients who have experienced brain injury or stroke. However, the prevalence of smoking, alcohol consumption, and drug abuse has led to a decline in the pool of healthy individuals suitable for organ donation. Consequently, there is a growing number of patients on transplant waiting lists, as the availability of suitable organs for transplantation remains limited. Additionally, the lack of awareness surrounding organ donation has emerged as a significant factor impeding market growth. Furthermore, ethical and cultural considerations pose substantial challenges in the transplantation market. Developing and underdeveloped nations often exhibit a lack of awareness regarding organ donation, contributing to hesitancy among potential organ donors. Cultural and social stigmas, as well as religious and customary beliefs, frequently discourage organ donation among families. These factors collectively hinder the market's growth prospects.

## Key Market Trends

### Advancements in Technology and Development:

Advancements in technology and development hold significant potential to substantially boost the demand for organ transplants in the future by addressing some of the challenges and limitations currently faced by the field. Technological progress and developments in the medical field have facilitated the transplantation of vital organs like the heart, kidney, liver, lungs, and various other organs. Key technical achievements encompass the development of vascular anastomosis techniques, effective management of the immune response through chemical immunosuppressants, and the formulation of preservation solutions.

These advancements can enhance organ availability, improve transplant success rates, and expand the possibilities for transplantation. Technology has the potential to enhance organ preservation and transportation methods, enabling organs to remain viable for longer periods before transplantation. This can lead to more efficient organ allocation, reduced wastage, and broader access to viable organs. Advances in bioprinting and tissue engineering are enabling the creation of bioengineered organs and tissues in the laboratory. This technology has the potential to address organ shortages by producing organs on demand, reducing the dependency on donor organs. Developments in immunosuppressive medications can lead to more targeted and effective treatments that minimize the risk of organ rejection. Improved immunosuppressive protocols can increase the success rate of transplant surgeries and

reduce the need for high medication doses. Research into xenotransplantation, the transplantation of organs from animals to humans, holds the potential to overcome the shortage of human donor organs. Advances in genetic editing and immunomodulation are making xenotransplantation more feasible and safer.

#### Advancements in Regenerative Medicine:

Regenerative therapies and tissue engineering have the potential to revolutionize organ transplantation by providing alternatives to traditional donor organs. The development of bioengineered tissues, organoids, and lab-grown organs could increase the availability of transplantable tissues. Scientists are working on creating functional tissues in the laboratory using a combination of cells, scaffolds, and growth factors. These bioengineered tissues could be used to repair damaged organs, restore function, or provide temporary support while waiting for a suitable donor organ. Organoids are miniature, simplified versions of organs grown in the lab from stem cells. They closely mimic the structure and function of actual organs, making them valuable for studying diseases, testing drug responses, and potentially serving as transplantable tissues in the future. Bioengineered tissues and organs can potentially be created using a patient's own cells, reducing the risk of rejection and the need for immunosuppressive medications.

#### Segmental Insights

##### Application Insights:

The global organ transplant market is divided into organ transplantation and tissue transplantation based on application. The organ transplant segment accounted for the highest revenue share in 2022. This can be attributed to the increasing demand for organ transplantation worldwide, driven by a rise in cases of organ failure resulting from heavy alcohol consumption and an unhealthy lifestyle. Moreover, continuous technological advancements by key players and healthcare professionals have improved the success rate and post-transplant prognosis, thereby fueling the revenue growth of this segment. On the other hand, the tissue transplant segment is expected to exhibit a steady growth rate during the forecast period. There is a significant demand for transplants of corneas, bones, skin, nerves, tendons, veins, and heart valves, especially for individuals affected by burns and accidents.

##### End User Insights:

Based on end-users, the global transplantation market is categorized into hospitals, transplant centers, and other facilities. The hospital segment accounted for the largest share of revenue in 2021, primarily due to the increasing number of medical procedures and operations performed in hospitals. Most hospitals have convenient access to well-defined organ databases, which facilitates the verification of organ supply and enables prompt medical interventions. This factor contributes to the revenue growth of the hospital segment. The transplant centers segment is expected to exhibit a stable revenue growth rate during the forecast period. This can be attributed to the growing demand for advanced healthcare centers to meet the increasing need for transplantation procedures. Transplant centers are particularly suitable for older adults as they provide personalized care and minimize the need for frequent visits to hospitals. Moreover, receiving treatment in transplant centers helps reduce the risk of hospital-acquired infections.

#### Regional Insights:

Based on regional analysis, the transplantation market in North America accounted for the largest share of revenue in 2022. The market's growth in this region is driven by continuous development of innovative transplantation products, a well-developed healthcare system, and increased personal health expenditure by the population. Additionally, the strong presence of various large-scale biotechnology and medical device companies is expected to further drive revenue growth in North America. Moreover, supportive government policies in Canada and the US contribute to the market's growth in this region. The market in the Asia Pacific region is projected to experience a faster revenue growth rate during the forecast period. The increasing prevalence of chronic diseases and the rise in road accidents leading to permanent organ damage are major factors driving revenue growth in this region. Furthermore, continuous advancements in transplantation technology by major players in countries within this region contribute to the revenue growth of the Asia Pacific transplantation market. Meanwhile, the European market is expected to maintain a steady high revenue growth rate during the forecast period. The increasing consumption of drugs and alcohol resulting in organ damage, combined with the strong presence of major market players and availability of skilled doctors, are driving the revenue growth of the market in the region.

#### Key Market Players

Abbvie, Inc.

Arthrex, Inc.

Zimmer Biomet

Medtronic plc

Novartis AG

Stryker Corporation

21st Century Medicine

BiolifeSolutions, Inc.

Teva Pharmaceuticals

Veloxis Pharmaceutical

#### Report Scope:

In this report, the Global Organ Transplant Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

#### Organ Transplant Market, By Product:

Tissue Products

Organ Preservation Products

Transplant Diagnostics

Immunosuppressant Drugs

Others

#### Organ Transplant Market, By Application:

Organ Transplantation

Tissue Transplantation

Organ Transplant Market, By Type of Transplant:

Autograft

Allograft

Others

Organ Transplant Market, By End User:

Hospitals

Transplant Centers

Others

Organ Transplant Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany



Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Organ Transplant Market.

Available Customizations:

Global Organ Transplant market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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