

# **Viscosupplementation Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Product Type (Single Injection, Three Injection, Five Injection), By End Use (Hospitals, Orthopedic Clinics/ASCs) By Region, By Competition Forecast & Opportunities, 2018-2028F**

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## **Abstracts**

In 2022, the Global Viscosupplementation Market reached a valuation of USD 4.03 billion, and it is projected to grow with a Compound Annual Growth Rate (CAGR) of 8.29% through 2028. This market is experiencing significant growth, primarily attributable to the increasing prevalence of osteoarthritis and musculoskeletal disorders, particularly among the aging demographic. Viscosupplementation entails the injection of hyaluronic acid-based solutions into joints to alleviate pain and enhance joint mobility. This minimally invasive treatment is gaining popularity as a surgical alternative.

Several factors contribute to the market's expansion, including the aging population, a rise in sports-related injuries, and the demand for non-surgical pain management solutions. Furthermore, continuous advancements in product development and the extension of applications to various joints are fueling further market growth. However, cost constraints and limited insurance coverage in certain regions continue to pose challenges to broader market adoption.

### **Key Market Drivers**

#### **Rising Aging Population**

The aging population is a significant driver behind the growth of the

Viscosupplementation Market. This trend is attributed to several factors that converge to create a substantial demand for viscosupplementation procedures and products. Aging is a primary risk factor for osteoarthritis, a degenerative joint disease that causes pain, stiffness, and reduced joint function. As people age, the likelihood of developing osteoarthritis increases significantly. This creates a substantial patient pool seeking relief from joint pain. Advances in healthcare have extended the average lifespan, resulting in a larger population segment that is susceptible to age-related joint issues. These individuals aspire to maintain an active and pain-free lifestyle as they age, further driving the demand for effective joint treatments.

Older individuals often have a strong desire to maintain their quality of life and independence. Joint pain can limit mobility and hinder daily activities, leading many seniors to seek solutions that allow them to stay active and engaged in their communities. Viscosupplementation offers a non-surgical alternative for managing joint pain, which is particularly appealing to older patients who may be averse to undergoing invasive surgical procedures due to potential risks and complications. Many older adults choose to continue working beyond the traditional retirement age. Joint pain can significantly impact their ability to work, and viscosupplementation can help them remain productive and financially independent. Ongoing research and development have led to the creation of more effective and longer lasting viscosupplements. These innovations make viscosupplementation a more attractive option for older patients looking for lasting relief. Increased awareness about joint health, osteoarthritis management, and the availability of viscosupplementation treatments has empowered older individuals to seek these solutions actively.

Healthcare providers often recommend viscosupplementation to their older patients as a conservative treatment option before considering more invasive interventions like joint replacement surgery. In conclusion, the rising aging population represents a substantial and growing market for viscosupplementation. The desire to maintain an active, pain-free lifestyle, coupled with advancements in treatment options, makes viscosupplementation an increasingly popular choice for managing joint pain and improving the overall quality of life for older individuals. As the global population continues to age, the demand for these procedures and products is expected to expand significantly.

### Minimally Invasive Treatment

Minimally invasive treatment methods are a driving force behind the growth of the Viscosupplementation Market. This trend is rooted in several factors that collectively

contribute to the increasing adoption of minimally invasive approaches for joint pain management. Minimally invasive procedures are associated with lower surgical risks compared to traditional open surgeries. This appeals to patients who may be concerned about complications associated with invasive joint surgeries, particularly the elderly population. Minimally invasive treatments typically offer quicker recovery times. Patients can resume their daily activities and work sooner, which is especially appealing to those with busy lives or older individuals who want to maintain an active lifestyle. Minimally invasive techniques often result in less postoperative pain and discomfort. This is crucial for patients seeking relief from joint pain, as they are typically looking to minimize pain, not exacerbate it. While minimally invasive procedures may have higher upfront costs, they can result in lower overall healthcare expenses. Reduced hospital stays and a decreased need for extensive postoperative care can translate into cost savings for patients and healthcare systems. Many minimally invasive joint treatments can be performed on an outpatient basis, eliminating the need for extended hospitalization. This aligns with the trend toward outpatient care and reduces the burden on inpatient healthcare facilities.

Patients often prefer minimally invasive procedures because they involve smaller incisions, fewer scars, and less disruption to their bodies. This preference drives demand for these treatments. Advances in medical technology have enabled the development of more sophisticated minimally invasive tools and techniques. This has improved the precision and effectiveness of joint treatments. Minimally invasive treatments can often be tailored to the patient's specific condition, providing a more personalized approach to joint pain management. Minimally invasive treatments aim to preserve as much healthy joint tissue as possible while addressing the underlying issue. This is particularly important for patients looking to maintain joint function and mobility.

Healthcare professionals are increasingly skilled in performing minimally invasive procedures, making these options more accessible and reliable for patients seeking joint pain relief. In conclusion, the rise of minimally invasive treatment options is a significant driver for the Viscosupplementation Market. Patients value the reduced risks, quicker recovery, and overall improved experience associated with these procedures. As technology continues to advance and healthcare providers gain expertise in minimally invasive techniques, the market is expected to continue growing as more individuals opt for these effective and patient-friendly joint pain management solutions.

### Increasing Sports Injuries

The growth of the Viscosupplementation Market is significantly driven by the increasing

incidence of sports injuries. Several factors contribute to the rise in sports-related injuries and, consequently, the demand for viscosupplementation as a treatment option. Sports and physical activities have become increasingly popular across all age groups. People of various ages now actively engage in sports, from amateur to professional levels. Athletes often undergo rigorous training regimens to improve their performance, which can increase the risk of injuries. Professional athletes, in particular, are constantly pushing their physical limits. Sports like football, soccer, rugby, and even basketball involve physical contact, which can result in acute injuries such as sprains, strains, and tears. Repetitive motions and overuse of specific joints or muscle groups can lead to chronic injuries. Runners, for example, frequently experience knee and hip issues due to the repetitive impact on these joints. Many older individuals continue to participate in sports and physical activities. However, aging can lead to a higher susceptibility to injuries and a slower recovery process.

Activities like skateboarding, snowboarding, and extreme sports involve high-impact movements that increase the risk of injuries. In contact sports like American football and hockey, concussions are a significant concern. While not related to joint injuries, they highlight the overall risk of sports-related health issues. High-profile athletes often receive viscosupplementation treatments for joint injuries, bringing attention to this treatment option and encouraging its adoption among the general population. Athletes, both professional and amateur, are typically highly motivated to return to their sports and activities as quickly as possible. Viscosupplementation can offer a faster recovery and pain relief, making it an attractive choice. Viscosupplementation provides a non-surgical alternative for joint pain management, which is appealing to athletes who want to avoid invasive procedures that may require longer recovery times.

Viscosupplementation can be integrated into rehabilitation programs to support athletes in their recovery and help them regain peak performance levels. Some athletes use viscosupplementation as a preventive measure to protect their joints from future injuries, particularly those with a history of joint problems. In summary, the growing incidence of sports-related injuries, coupled with the desire for quicker recovery and effective pain management, has led to an increased demand for viscosupplementation in the Viscosupplementation Market. Athletes of all levels are increasingly turning to this treatment option to resume their sports and physical activities as soon as possible, driving the market's expansion.

## Patient Preference

Patient preference plays a significant role in driving the growth of the

Viscosupplementation Market. This treatment option for joint pain and osteoarthritis offers several advantages that align with the preferences and needs of patients, contributing to its increasing popularity.

Viscosupplementation is a non-surgical procedure involving the injection of a gel-like substance directly into the affected joint. Many patients prefer this minimally invasive approach over surgical interventions, as it involves less risk, shorter recovery times, and fewer complications. Osteoarthritis and joint pain can be debilitating and affect the quality of life. Patients seek effective pain relief, and viscosupplementation provides targeted relief by lubricating and cushioning the joint, reducing friction, and alleviating discomfort. Beyond pain relief, patients often desire improved joint function. Viscosupplementation can enhance joint mobility and flexibility, allowing individuals to perform daily activities and maintain an active lifestyle. Patients appreciate treatments that allow them to resume their normal activities swiftly. Viscosupplementation typically involves minimal downtime, enabling patients to return to work, sports, and other daily routines promptly.

Viscosupplementation can provide relief for an extended period, reducing the need for frequent medical interventions. This long-lasting effect is attractive to patients who prefer not to undergo regular treatments. The risk of adverse effects associated with viscosupplementation is relatively low. Patients are less concerned about complications commonly associated with surgery, making it a safer option. Healthcare providers can tailor viscosupplementation treatments to meet individual patient needs. This personalized approach resonates with patients who prefer treatments designed specifically for their condition. Patients may prefer viscosupplementation over medications, as it reduces the risk of side effects often associated with prolonged medication use. Viscosupplementation involves the use of hyaluronic acid, a substance naturally present in healthy joint fluid. Patients appreciate treatments that mimic the body's natural mechanisms.

Positive outcomes and patient satisfaction contribute to the growing demand for viscosupplementation. When patients experience pain relief and improved joint function, they are more likely to recommend the treatment to others. Some individuals opt for viscosupplementation as a preventive measure, especially if they have a family history of joint problems or are at risk of osteoarthritis. Preventing joint deterioration aligns with patients' proactive approach to health. In conclusion, patient preference for non-surgical, effective, and minimally invasive treatments that provide pain relief, improve joint function, and offer quick recovery has fueled the growth of the Viscosupplementation Market. As patients become more informed about their options

and seek treatments aligned with their preferences, viscosupplementation continues to gain prominence as a preferred choice for managing joint pain and osteoarthritis.

## Key Market Challenges

### High Treatment Cost

The high cost of viscosupplementation treatments poses a significant challenge to the Viscosupplementation Market. This challenge primarily affects both patients and healthcare systems in several ways. Firstly, the cost of viscosupplementation injections can be substantial, especially when multiple injections are required over time. Osteoarthritis, the primary condition treated with viscosupplementation, is often a chronic and progressive condition. Patients may need repeated injections to maintain pain relief and joint function, resulting in ongoing expenses. This can be financially burdensome for individuals, particularly those without adequate insurance coverage. Secondly, healthcare systems and insurance providers face challenges related to reimbursement. Some insurance plans may have limited coverage for viscosupplementation, leaving patients to cover a significant portion of the cost out of pocket. For healthcare systems, the cost-effectiveness of covering viscosupplementation compared to other treatments may be a consideration.

Moreover, the high treatment cost can deter patients from pursuing viscosupplementation as a viable option for managing their joint pain. Patients may opt for alternative treatments, such as medications or physical therapy, which they perceive as more affordable. To address this challenge, efforts are needed to make viscosupplementation more cost-effective and accessible. This may include negotiating lower prices for viscosupplementation products, improving insurance coverage and reimbursement policies, and exploring value-based pricing models. Additionally, raising awareness among patients and healthcare providers about the potential long-term benefits of viscosupplementation compared to the costs of managing chronic joint pain can help patients make informed decisions about their treatment options.

### Regulatory Challenges

Regulatory challenges pose a significant obstacle to the Viscosupplementation Market. These challenges arise from the complex and evolving regulatory landscape governing medical devices and treatments, including viscosupplements. One major regulatory challenge is the classification of viscosupplements as medical devices or drugs. The classification can vary by region and has a direct impact on the approval process and



market access. In some cases, viscosupplements are considered medical devices, subject to different regulatory requirements than pharmaceuticals. This classification ambiguity can lead to delays in market entry and create uncertainty for manufacturers. Another regulatory challenge is the need for robust clinical evidence to support the safety and efficacy of viscosupplementation products. Regulatory agencies, such as the U.S. Food and Drug Administration (FDA) and the European Medicines Agency (EMA), require comprehensive clinical trials and data demonstrating the benefits of these products. Conducting such trials can be time-consuming and costly, which can slow down the introduction of new viscosupplements to the market.

Additionally, regulatory agencies periodically update their guidelines and requirements for medical devices and pharmaceuticals. Keeping up with these changes and ensuring compliance can be challenging for manufacturers. Non-compliance or failure to meet evolving standards can result in product recalls or delays in approvals. Harmonizing regulations across different regions and countries is another significant challenge, as manufacturers often seek to distribute their products globally. Varying regulatory requirements in different markets can complicate the process of gaining approvals and market access. To address these regulatory challenges, collaboration between regulatory agencies, industry stakeholders, and research institutions is essential. Streamlining the classification process, providing clear guidelines, and fostering innovation while maintaining safety standards can help ensure that patients have access to effective viscosupplementation treatments while meeting regulatory requirements.

## Key Market Trends

### Biocompatible Hyaluronic Acid (HA) Derivatives

The Viscosupplementation Market is witnessing a significant trend towards the development and adoption of biocompatible Hyaluronic Acid (HA) derivatives. This trend is driven by the quest for more effective and enduring solutions to alleviate the pain and discomfort associated with osteoarthritis. Hyaluronic acid is a natural component found in the synovial fluid that lubricates joints. It acts as a shock absorber and reduces friction in the joint, providing relief from pain and stiffness. In viscosupplementation, synthetic HA is injected into the affected joint to supplement the body's natural HA. Biocompatible HA derivatives are engineered to closely mimic the properties of natural HA. They offer several advantages. These derivatives are designed to provide longer-lasting pain relief compared to traditional HA products. This durability reduces the frequency of injections required, improving patient compliance and convenience.

Biocompatible HA derivatives offer superior joint lubrication, reducing friction and minimizing pain and inflammation. This leads to better overall joint function and comfort for patients.

**Sustained Pain Relief:** Patients can experience sustained pain relief over an extended period, enhancing their quality of life and reducing the impact of osteoarthritis on daily activities. **Minimized Side Effects:** By closely resembling natural HA, these derivatives are less likely to cause adverse reactions or side effects, making them safer for patients. The longer duration of pain relief and reduced treatment frequency contribute to higher patient satisfaction rates. Manufacturers in the Viscosupplementation Market are investing in research and development to create advanced biocompatible HA derivatives. These innovations are transforming the landscape of osteoarthritis management by offering patients more effective, convenient, and enduring solutions. As the trend towards biocompatible HA derivatives continues to grow, it is expected to improve the lives of millions of individuals suffering from osteoarthritis around the world.

### Single-Injection Viscosupplements

The Viscosupplementation Market is witnessing a notable trend towards the development and adoption of single injection viscosupplements. This trend is driven by the desire to enhance patient convenience, compliance, and overall treatment outcomes for individuals suffering from osteoarthritis. Traditionally, viscosupplementation therapy involved a series of injections administered over several weeks. However, single injection viscosupplements have gained prominence due to their distinct advantages. Single injections reduce the treatment burden on patients, eliminating the need for multiple visits to healthcare facilities. This convenience aligns with the modern lifestyle, where patients seek efficient and time-saving healthcare solutions. Simplified treatment regimens often result in higher patient compliance. Patients are more likely to complete their treatment when it involves fewer injections, leading to better outcomes.

Fewer injections mean reduced discomfort and anxiety for patients. This can improve the overall treatment experience and reduce the fear associated with needles. Single injection viscosupplements are designed to provide quicker onset of pain relief. This rapid response can significantly improve the patient's quality of life by alleviating pain and discomfort sooner. Single injections can potentially lower the overall cost of treatment by reducing the number of healthcare visits and associated expenses. Manufacturers in the Viscosupplementation Market are investing in research and development to create highly effective single-injection formulations. These innovations are transforming osteoarthritis management by offering a more patient-friendly and



efficient approach to pain relief. As the trend towards single injection viscosupplements continues to gain momentum, it is expected to make osteoarthritis treatment more accessible and appealing to a broader patient population, ultimately improving their overall well-being.

## Segmental Insights

### Product Insights

In the Viscosupplementation Market, product segmentation plays a pivotal role in catering to the diverse needs of patients suffering from osteoarthritis. This segmentation comprises single injections, three injections, and five injections. Among these, the three-injection viscosupplementation procedure segment emerged as the dominant force in 2022, commanding a substantial revenue share. The preference for three-injection procedures is rooted in their established effectiveness in managing osteoarthritis. Healthcare practitioners often opt for this approach to delay or avoid the need for more invasive interventions like total knee replacement surgery. Additionally, the market boasts a wide array of three-injection options, further contributing to the segment's prominence. Numerous clinical trials have not only gained approval but have also demonstrated favorable outcomes associated with these three-injection protocols for osteoarthritis management.

However, it's worth noting that the single-injection segment is poised for rapid growth in the coming years. While relatively new in the market, single injections show immense promise due to their streamlined treatment regimen. They offer the advantages of shorter treatment duration, reduced hospital visits, and a lower incidence of adverse effects and associated pain. Zimmer Biomet's Gel-One, a low-volume viscosupplement, stands as a pioneering example of a single-injection formula. This innovation caters to patients who may not have responded favorably to other conservative treatments. Investments in research and development, coupled with the increasing demand for effective osteoarthritis management, are expected to be key drivers of market growth in the forecast period. As patients and healthcare providers seek more convenient and efficient treatment options, the market's evolution towards single injection viscosupplements is set to play a pivotal role in meeting these evolving needs and improving the quality of life for those affected by osteoarthritis.

## End Use Insights

In 2022, the market is categorized by its end-users, namely hospitals and orthopedic

clinics/ambulatory surgical centers (ASCs). The dominant player in this market was the orthopedic clinics and ambulatory surgical centers segment. This was primarily due to the substantial demand for outpatient surgeries. Orthopedic clinics specialize in addressing issues related to the musculoskeletal system, encompassing both surgical and nonsurgical treatments for joints, bones, ligaments, muscles, spine, and nerves. The rising prevalence of osteoarthritis among the elderly population is a key driver of growth for this segment.

Furthermore, this segment is expected to experience the fastest growth rate. ASCs can conduct same-day surgeries for various orthopedic procedures such as ACL surgery, hip, knee, and shoulder replacements, among others. These surgeries are relatively uncomplicated and typically require minimal or no hospitalization, enabling orthopedic clinics to accommodate more patients daily. However, hospitals are projected to continue their growth trajectory in the coming years. This can be attributed to advancements in medical technology, which have led to the emergence of multispecialty hospitals. According to data from the Global RA Network, the number of people worldwide afflicted with arthritis exceeded 350 million in 2021, and this figure continues to rise annually, primarily due to an aging demographic. Consequently, the expansion of both orthopedic clinics and hospitals is expected to persist as they cater to the increasing demand for musculoskeletal healthcare services.

## Regional Insights

In 2022, the Asia Pacific region led the market with the largest market share. This was primarily driven by the presence of a significant geriatric population, which is particularly susceptible to osteoarthritis, a key factor contributing to market growth in this region. Additionally, various initiatives aimed at strengthening the market have further fueled its expansion. For example, in April 2022, Juniper Biologics and Kolon Life entered into a licensing agreement for the development and commercialization of TissueGene-C low dose, an investigational therapy for knee osteoarthritis. This therapy is administered as a single intra-articular injection and eliminates the need for surgery. Under the agreement, Juniper is responsible for developing and marketing this gene therapy to medical professionals and hospitals in the Asia Pacific region.

Europe is expected to exhibit the fastest growth rate over the forecast period. This growth can be attributed to factors such as the increasing geriatric population and greater investments made by market players in the region. Notably, osteoporosis affects more than 2.5 million women annually in the UK and France, underscoring the significance of musculoskeletal healthcare in this region and driving the demand for

related treatments and therapies.

### Key Market Players

Sanofi SA

Seikagaku Corporation

Smith & Nephew PLC.

Lifecore Biomedical, LLC.

Fidia Farmaceutici S.p.A

F.Hoffmann-La Roche Ltd.

LG Life Sciences Ltd.

Ferring Pharmaceutical B.V.

Zimmer Biomet Holdings Inc

Anika Therapeutics, Inc.

### Report Scope:

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

#### Viscosupplementation Market, By Product Type:

Single Injection

Three Injection

Five Injection

#### Viscosupplementation Market, By End Use:

Hospitals

Orthopedic Clinics/ASCs

Viscosupplementation 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 Viscosupplementation Market.

## Available Customizations:

Global Viscosupplementation 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).

## Contents

### 1. PRODUCT OVERVIEW

### 2. RESEARCH METHODOLOGY

### 3. EXECUTIVE SUMMARY

### 4. VOICE OF CUSTOMERS

### 5. GLOBAL VISCOSUPPLEMENTATION MARKET OUTLOOK

#### 5.1. Market Size & Forecast

##### 5.1.1. By Value

#### 5.2. Market Share & Forecast

##### 5.2.1. By Product Type (Single Injection, Three Injection, Five Injection)

##### 5.2.2. By End Use (Hospitals, Orthopedic Clinics/ASCs)

##### 5.2.3. By Company (2022)

##### 5.2.4. By Region

#### 5.3. Market Map

### 6. NORTH AMERICA VISCOSUPPLEMENTATION MARKET OUTLOOK

#### 6.1. Market Size & Forecast

##### 6.1.1. By Value

#### 6.2. Market Share & Forecast

##### 6.2.1. By Product Type

##### 6.2.2. By End Use

##### 6.2.3. By Country

#### 6.3. North America: Country Analysis

##### 6.3.1. United States Viscosupplementation Market Outlook

###### 6.3.1.1. Market Size & Forecast

###### 6.3.1.1.1. By Value

###### 6.3.1.2. Market Share & Forecast

###### 6.3.1.2.1. By Product Type

###### 6.3.1.2.2. By End Use

##### 6.3.2. Mexico Viscosupplementation Market Outlook

###### 6.3.2.1. Market Size & Forecast

###### 6.3.2.1.1. By Value



- 6.3.2.2. Market Share & Forecast
  - 6.3.2.2.1. By Product Type
  - 6.3.2.2.2. By End Use
- 6.3.3. Canada Viscosupplementation Market Outlook
  - 6.3.3.1. Market Size & Forecast
    - 6.3.3.1.1. By Value
  - 6.3.3.2. Market Share & Forecast
    - 6.3.3.2.1. By Product Type
    - 6.3.3.2.2. By End Use

## **7. EUROPE VISCOSUPPLEMENTATION MARKET OUTLOOK**

- 7.1. Market Size & Forecast
  - 7.1.1. By Value
- 7.2. Market Share & Forecast
  - 7.2.1. By Product Type
  - 7.2.2. By End Use
  - 7.2.3. By Country
- 7.3. Europe: Country Analysis
  - 7.3.1. France Viscosupplementation Market Outlook
    - 7.3.1.1. Market Size & Forecast
      - 7.3.1.1.1. By Value
    - 7.3.1.2. Market Share & Forecast
      - 7.3.1.2.1. By Product Type
      - 7.3.1.2.2. By End Use
  - 7.3.2. Germany Viscosupplementation Market Outlook
    - 7.3.2.1. Market Size & Forecast
      - 7.3.2.1.1. By Value
    - 7.3.2.2. Market Share & Forecast
      - 7.3.2.2.1. By Product Type
      - 7.3.2.2.2. By End Use
  - 7.3.3. United Kingdom Viscosupplementation Market Outlook
    - 7.3.3.1. Market Size & Forecast
      - 7.3.3.1.1. By Value
    - 7.3.3.2. Market Share & Forecast
      - 7.3.3.2.1. By Product Type
      - 7.3.3.2.2. By End Use
  - 7.3.4. Italy Viscosupplementation Market Outlook
    - 7.3.4.1. Market Size & Forecast

- 7.3.4.1.1. By Value
- 7.3.4.2. Market Share & Forecast
  - 7.3.4.2.1. By Product Type
  - 7.3.4.2.2. By End Use
- 7.3.5. Spain Viscosupplementation Market Outlook
  - 7.3.5.1. Market Size & Forecast
    - 7.3.5.1.1. By Value
  - 7.3.5.2. Market Share & Forecast
    - 7.3.5.2.1. By Product Type
    - 7.3.5.2.2. By End Use

## **8. ASIA-PACIFIC VISCOSUPPLEMENTATION MARKET OUTLOOK**

- 8.1. Market Size & Forecast
  - 8.1.1. By Value
- 8.2. Market Share & Forecast
  - 8.2.1. By Product Type
  - 8.2.2. By End Use
  - 8.2.3. By Country
- 8.3. Asia-Pacific: Country Analysis
  - 8.3.1. China Viscosupplementation Market Outlook
    - 8.3.1.1. Market Size & Forecast
      - 8.3.1.1.1. By Value
    - 8.3.1.2. Market Share & Forecast
      - 8.3.1.2.1. By Product Type
      - 8.3.1.2.2. By End Use
  - 8.3.2. India Viscosupplementation Market Outlook
    - 8.3.2.1. Market Size & Forecast
      - 8.3.2.1.1. By Value
    - 8.3.2.2. Market Share & Forecast
      - 8.3.2.2.1. By Product Type
      - 8.3.2.2.2. By End Use
  - 8.3.3. South Korea Viscosupplementation Market Outlook
    - 8.3.3.1. Market Size & Forecast
      - 8.3.3.1.1. By Value
    - 8.3.3.2. Market Share & Forecast
      - 8.3.3.2.1. By Product Type
      - 8.3.3.2.2. By End Use
  - 8.3.4. Japan Viscosupplementation Market Outlook

- 8.3.4.1. Market Size & Forecast
  - 8.3.4.1.1. By Value
- 8.3.4.2. Market Share & Forecast
  - 8.3.4.2.1. By Product Type
  - 8.3.4.2.2. By End Use
- 8.3.5. Australia Viscosupplementation Market Outlook
  - 8.3.5.1. Market Size & Forecast
    - 8.3.5.1.1. By Value
  - 8.3.5.2. Market Share & Forecast
    - 8.3.5.2.1. By Product Type
    - 8.3.5.2.2. By End Use

## **9. SOUTH AMERICA VISCOSUPPLEMENTATION MARKET OUTLOOK**

- 9.1. Market Size & Forecast
  - 9.1.1. By Value
- 9.2. Market Share & Forecast
  - 9.2.1. By Product Type
  - 9.2.2. By End Use
  - 9.2.3. By Country
- 9.3. South America: Country Analysis
  - 9.3.1. Brazil Viscosupplementation Market Outlook
    - 9.3.1.1. Market Size & Forecast
      - 9.3.1.1.1. By Value
    - 9.3.1.2. Market Share & Forecast
      - 9.3.1.2.1. By Product Type
      - 9.3.1.2.2. By End Use
  - 9.3.2. Argentina Viscosupplementation Market Outlook
    - 9.3.2.1. Market Size & Forecast
      - 9.3.2.1.1. By Value
    - 9.3.2.2. Market Share & Forecast
      - 9.3.2.2.1. By Product Type
      - 9.3.2.2.2. By End Use
  - 9.3.3. Colombia Viscosupplementation Market Outlook
    - 9.3.3.1. Market Size & Forecast
      - 9.3.3.1.1. By Value
    - 9.3.3.2. Market Share & Forecast
      - 9.3.3.2.1. By Product Type
      - 9.3.3.2.2. By End Use

## **10. MIDDLE EAST AND AFRICA VISCOSUPPLEMENTATION MARKET OUTLOOK**

### 10.1. Market Size & Forecast

#### 10.1.1. By Value

### 10.2. Market Share & Forecast

#### 10.2.1. By Product Type

#### 10.2.2. By End Use

#### 10.2.3. By Country

### 10.3. MEA: Country Analysis

#### 10.3.1. South Africa Viscosupplementation Market Outlook

##### 10.3.1.1. Market Size & Forecast

###### 10.3.1.1.1. By Value

##### 10.3.1.2. Market Share & Forecast

###### 10.3.1.2.1. By Product Type

###### 10.3.1.2.2. By End Use

#### 10.3.2. Saudi Arabia Viscosupplementation Market Outlook

##### 10.3.2.1. Market Size & Forecast

###### 10.3.2.1.1. By Value

##### 10.3.2.2. Market Share & Forecast

###### 10.3.2.2.1. By Product Type

###### 10.3.2.2.2. By End Use

#### 10.3.3. UAE Viscosupplementation Market Outlook

##### 10.3.3.1. Market Size & Forecast

###### 10.3.3.1.1. By Value

##### 10.3.3.2. Market Share & Forecast

###### 10.3.3.2.1. By Product Type

###### 10.3.3.2.2. By End Use

## **11. MARKET DYNAMICS**

### 11.1. Drivers

### 11.2. Challenges

## **12. MARKET TRENDS & DEVELOPMENTS**

### 12.1. Recent Developments

### 12.2. Product Launches

### 12.3. Mergers & Acquisitions

## **13. PESTLE ANALYSIS**

## **14. PORTER'S FIVE FORCES ANALYSIS**

- 14.1. Competition in the Industry
- 14.2. Potential of New Entrants
- 14.3. Power of Suppliers
- 14.4. Power of Customers
- 14.5. Threat of Substitute Product

## **15. COMPETITIVE LANDSCAPE**

- 15.1. Business Overview
- 15.2. Company Snapshot
- 15.3. Product & Services
- 15.4. Financials (In case of listed companies)
- 15.5. Recent Developments
- 15.6. SWOT Analysis
  - 15.6.1. Sanofi SA
  - 15.6.2. Seikagaku Corporation
  - 15.6.3. Smith & Nephew PLC.
  - 15.6.4. Lifecore Biomedical, LLC.
  - 15.6.5. Fidia Farmaceutici S.p.A
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