

Vascular Closure Device Market Size and Forecasts (2020 - 2030), Global and Regional Share, Trends, and Growth Opportunity Analysis By Product Type (Active Approximators, Passive Approximators, and External Hemostatic Devices), Access (Femoral Access and Radial Access), Procedure (Interventional Cardiology, Interventional Radiology, and Endovascular Surgery), and End User (Hospitals, Ambulatory Surgical Centers, and Others), and Geography (North America, Europe, Asia Pacific, Middle East & Africa, and South & Central America)

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Abstracts

The global vascular closure device market is expected to reach US\$ 2.804 billion in 2030 from US\$ 1.620 billion in 2022. The market is estimated to grow with a CAGR of 7.1% from 2022 to 2030.

The key factors driving the market's growth include increasing prevalence of cardiovascular diseases and burgeoning demand for minimally invasive devices. However, risk of infection related to vascular closure devices hinder the market growth.

Market Opportunities of Vascular Closure Device Market

Emerging countries such as India, China, Argentina, Brazil, UAE, and South Africa are expected to offer significant growth opportunities for vascular closure devices market players due to rising disposable incomes, expanding patient population, increasing R&D

activities, improving healthcare infrastructure, growing CVD awareness, and relatively lenient guidelines compared to developed countries. According to the World Economic Forum, as of 2022, Russia, Brazil, China, India, and South Africa collectively accounted for a third of total global health spending. As per the World Bank, health spending in India and China increased by 3.01% and 5.35%, respectively, from 2018 to 2019. Also, there has been an upsurge in heart failure cases over the past decade in emerging markets, which has resulted in a large number of cardiovascular disease-related deaths. As per the India Brand Equity Foundation, hospitals contribute to ~70% of the revenue of the healthcare sector in India. In China, the number of private hospitals reached up to 36,000 in 2022. Moreover, the private hospitals account for ~57% of total number of hospitals in the country. The number of surgical centers and hospitals in developing markets is estimated to grow due to rising healthcare spending and a surge in the target patient population. Therefore, the development of healthcare facilities in developing economies along with a surge in a number of hospitals would propel the awareness and adoption of vascular closure devices in emerging economies. Further, vast competition in developed or matured markets encourages vascular closure device manufacturers to focus on developing markets, which is likely to offer growth opportunities for vascular closure device providers to attain a significant position in the market.

Factors Hampering Vascular Closure Device Market

Vascular closure devices are more prone to causing infections as compared to manual compression. Groin hematomas is among the most common problems that can occur just after sheath removal if there is inability to control the femoral artery while using femoral vascular closure devices. In cases of vascular closure device failure, manual compression must be applied to accomplish hemostasis. Groin hematomas are the most common complication with femoral access, and patients who develop a hematoma may be seriously hindered in normal physical activities. Thus, groin hematomas may lead to incremental health costs due to complications and extended length of stay in hospital. Other notable complications of closure devices include limb ischemia and ischemia distal to the arteriotomy site. Distal limb ischemia commonly occurs through distal embolization or thrombosis, and it can be caused due to the placement of a closure device which is contraindicated in heavily calcified areas of arteries. Compared to manual compression, limb ischemia infection is more common in vascular closure devices. Thus, the risk of infection hampers the growth of the vascular closure device market to a certain extent.

Vascular Closure Device Market: Segmental Overview

The vascular closure device market, by product type, is segmented into active approximators, passive approximators, and external hemostatic devices. The passive approximators segment held the largest share of the market in 2022, and it is anticipated to register the highest CAGR in the market during 2022-2030. Passive approximators deploy a plug, sealant, or gel at the arteriotomy site instead of closing it via an active mechanism. Unlike active approximators, passive approximators do not require any additional closure mechanisms, such as sutures or clips, once deployed. Passive approximators typically consist of biodegradable or resorbable components that facilitate the natural clotting process and promote the formation of a stable blood clot at a puncture site.

Based on access, the vascular closure device market has been segmented into femoral access and radial access. The femoral access segment held a larger share of the market in 2022. The radial access segment is expected to register a higher CAGR in the market during 2022–2030. Femoral access involves accessing blood vessels through the femoral artery in the groin area, while radial access involves accessing blood vessels through a radial artery in the wrist. The radial approach has gained popularity in recent years due to its advantages such as reduced risk of complications, including bleeding and hematoma, compared to femoral access.

Based on procedure, the vascular closure device market is segmented into interventional radiology, interventional cardiology, and endovascular surgical. The interventional cardiology segment held the largest share of the market in 2022. However, the interventional radiology segment is expected to register the highest CAGR in the market during 2022–2030. Interventional radiology (IR) is a medical specialty that uses minimally invasive techniques guided by medical imaging to diagnose and treat a wide range of conditions.

Based on end user, the vascular closure device market is segmented into hospitals, ambulatory surgical centers, and others. The hospital segment held the largest share of the market in 2022. The ambulatory surgical centers segment is further expected to register the highest CAGR in the market during 2022–2030. Hospitals are the primary end users of vascular closure devices as they offer a wide range of medical services, including invasive procedures that require vascular access.

Vascular Closure Device Market: Geographical Overview

North America accounted for the largest share of the global vascular closure device

market in 2022. In the region, the US held the largest vascular closure device market share and is anticipated to register the highest CAGR during 2022-2030. The US is estimated to hold the largest share of the vascular closure device market during 2022–2030. The country has a well-developed healthcare sector with access to highly advanced equipment and instruments. It reports a high prevalence of cardiovascular diseases. According to the “Heart Disease and Stroke Statistics - 2023 Update” by the American Heart Association, in 2020, coronary heart disease (CHD) was a leading cause (41.2%) of deaths associated with CVDs in the US, followed by stroke (17.3%), other CVD (16.8%), high blood pressure (12.9%), heart failure (9.2%), and artery diseases (2.6%), respectively. As per the US Centers for Disease Control and Prevention (CDC), ~1 in 20 adults in the US, aged 20 and above, have coronary artery disease. The study also mentions coronary artery disease as the most common type of heart disease in the US. Thus, a high prevalence of CVDs and coronary artery disease would propel the adoption of vascular closure devices during surgical interventions in the US in the coming years.

The US is a hub for medical innovations and technological advancements in healthcare. Continuous advancements in technologies associated with minimally invasive procedures, improvements in closure device technologies, and the introduction of novel closure devices contribute to the growth of the vascular closure devices market in the US. For instance, in March 2023, Haemonetics Corporation (US) invested ~US\$ 31.72 million (EUR 30 million) in Vivasure Medical Limited. In March 2023, Vivasure Medical announced FDA IDE approval to Initiate a US Pivotal Study evaluating the safety and effectiveness of the Vivasure PerQseal Closure Device System. In 2021, VASCADE MVP was the first and only FDA-approved vascular closure device indicated for use following atrial fibrillation (AF) ablation to allow same-day discharge.

A few of the major primary and secondary sources referred to while preparing the report on the vascular closure device market are the World Bank Data, National Health Service (NHS), FDA (Food and Drug Administration), EMA (European Medicines Agency), and WHO (World Health Organization).

Contents

1. INTRODUCTION

- 1.1 The Insight Partners Research Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights

3. RESEARCH METHODOLOGY

- 3.1 Coverage
- 3.2 Secondary Research
- 3.3 Primary Research

4. VASCULAR CLOSURE DEVICE MARKET LANDSCAPE

- 4.1 Overview
- 4.2 PEST Analysis
 - 4.2.1 Global PEST Analysis

5. VASCULAR CLOSURE DEVICE MARKET - KEY INDUSTRY DYNAMICS

- 5.1 Market Drivers
 - 5.1.1 Increasing Prevalence of Cardiovascular Diseases
 - 5.1.2 Burgeoning Demand for Minimally Invasive Devices
- 5.2 Market Restraints
 - 5.2.1 Risk of Infection Related to Vascular Closure Devices
- 5.3 Market Opportunities
 - 5.3.1 Untapped Potential of Emerging Economies
- 5.4 Future Trends
 - 5.4.1 Strategic Activities by Manufacturers
- 5.5 Impact Analysis:

6. VASCULAR CLOSURE DEVICE MARKET - GLOBAL MARKET ANALYSIS

- 6.1 Vascular Closure Device Market Revenue (US\$ Mn), 2022 – 2030

7. GLOBAL VASCULAR CLOSURE DEVICE MARKET – REVENUE AND FORECAST TO 2030 – BY PRODUCT TYPE

7.1 Overview

7.2 Vascular Closure Device Market Revenue Share, by Product Type 2022 & 2030 (%)

7.3 Active Approximators

7.3.1 Overview

7.3.2 Active Approximators: Vascular Closure Device Market – Revenue and Forecast to 2030 (US\$ Million)

7.3.2.1 Active Approximators: Vascular Closure Device Market – Revenue and Forecast to 2030 (US\$ Million)

7.4 Passive Approximators

7.4.1 Overview

7.4.2 Passive Approximators: Vascular Closure Device Market – Revenue and Forecast to 2030 (US\$ Million)

7.4.2.1 Passive Approximators: Vascular Closure Device Market – Revenue and Forecast to 2030 (US\$ Million)

7.5 External hemostatic devices

7.5.1 Overview

7.5.2 External hemostatic devices: Vascular Closure Device Market – Revenue and Forecast to 2030 (US\$ Million)

8. GLOBAL VASCULAR CLOSURE DEVICE MARKET – REVENUE AND FORECAST TO 2030 – BY ACCESS

8.1 Overview

8.2 Vascular Closure Device Market Revenue Share, by Access 2022 & 2030 (%)

8.3 Femoral Access

8.3.1 Overview

8.3.2 Femoral Access: Vascular Closure Device Market – Revenue and Forecast to 2030 (US\$ Million)

8.4 Radial Access

8.4.1 Overview

8.4.2 Radial Access: Vascular Closure Device Market – Revenue and Forecast to 2030 (US\$ Million)

9. GLOBAL VASCULAR CLOSURE DEVICE MARKET – REVENUE AND FORECAST TO 2030 – BY PROCEDURE

9.1 Overview

9.2 Vascular Closure Device Market Revenue Share, by Procedure 2022 & 2030 (%)

9.3 Interventional Cardiology

9.3.1 Overview

9.3.2 Interventional Cardiology: Vascular Closure Device Market – Revenue and Forecast to 2030 (US\$ Million)

9.4 Interventional Radiology

9.4.1 Overview

9.4.2 Interventional Radiology: Vascular Closure Device Market – Revenue and Forecast to 2030 (US\$ Million)

9.5 Endovascular Surgical

9.5.1 Overview

9.5.2 Endovascular Surgical: Vascular Closure Device Market – Revenue and Forecast to 2030 (US\$ Million)

10. GLOBAL VASCULAR CLOSURE DEVICE MARKET – REVENUE AND FORECAST TO 2030 – BY END USERS

10.1 Overview

10.2 Vascular Closure Device Market Revenue Share, by End Users 2022 & 2030 (%)

10.3 Hospitals

10.3.1 Overview

10.3.2 Hospitals: Vascular Closure Device Market – Revenue and Forecast to 2030 (US\$ Million)

10.4 Ambulatory Surgical Center

10.4.1 Overview

10.4.2 Ambulatory Surgical Center: Vascular Closure Device Market – Revenue and Forecast to 2030 (US\$ Million)

10.5 Others

10.5.1 Overview

10.5.2 Others: Vascular Closure Device Market – Revenue and Forecast to 2030 (US\$ Million)

11. VASCULAR CLOSURE DEVICE MARKET - GEOGRAPHICAL ANALYSIS

11.1 North America Vascular Closure Device Market, Revenue And Forecast To 2030

11.1.1 Overview

11.1.2 North America Vascular Closure Device Market Revenue and Forecast to 2030

(US\$ Mn)

11.1.2.1 North America Vascular Closure Device Market, by Product Type

11.1.2.1.1 North America: Vascular Closure Device Market, by Active Approximators, 2020–2030 (US\$ Million)

11.1.2.1.2 North America: Vascular Closure Device Market, by Passive Approximators , 2020–2030 (US\$ Million)

11.1.2.2 North America Vascular Closure Device Market, by Access

11.1.2.3 North America Vascular Closure Device Market, by Procedure

11.1.2.4 North America Vascular Closure Device Market, by End Users

11.1.2.5 North America Vascular Closure Device Market, by Country

11.1.2.6 US

11.1.2.6.1 Overview

11.1.2.6.2 US Vascular Closure Device Market Revenue and Forecast to 2030 (US\$ Mn)

11.1.2.6.3 US Vascular Closure Device Market, by Product Type

11.1.2.6.3.1 US: Vascular Closure Device Market, by Active Approximators, 2020–2030 (US\$ Million)

11.1.2.6.3.2 US: Vascular Closure Device Market, by Passive Approximators , 2020–2030 (US\$ Million)

11.1.2.6.4 US Vascular Closure Device Market, by Access

11.1.2.6.5 US Vascular Closure Device Market, by Procedure

11.1.2.6.6 US Vascular Closure Device Market, by End Users

11.1.2.7 Canada

11.1.2.7.1 Overview

11.1.2.7.2 Canada Vascular Closure Device Market Revenue and Forecast to 2030 (US\$ Mn)

11.1.2.7.3 Canada Vascular Closure Device Market, by Product Type

11.1.2.7.3.1 Canada: Vascular Closure Device Market, by Active Approximators, 2020–2030 (US\$ Million)

11.1.2.7.3.2 Canada: Vascular Closure Device Market, by Passive Approximators , 2020–2030 (US\$ Million)

11.1.2.7.4 Canada Vascular Closure Device Market, by Access

11.1.2.7.5 Canada Vascular Closure Device Market, by Procedure

11.1.2.7.6 Canada Vascular Closure Device Market, by End Users

11.1.2.8 Mexico

11.1.2.8.1 Overview

11.1.2.8.2 Mexico Vascular Closure Device Market Revenue and Forecast to 2030 (US\$ Mn)

11.1.2.8.3 Mexico Vascular Closure Device Market, by Product Type

11.1.2.8.3.1 Mexico: Vascular Closure Device Market, by Active Approximators, 2020–2030 (US\$ Million)

11.1.2.8.3.2 Mexico: Vascular Closure Device Market, by Passive Approximators , 2020–2030 (US\$ Million)

11.1.2.8.4 Mexico Vascular Closure Device Market, by Access

11.1.2.8.5 Mexico Vascular Closure Device Market, by Procedure

11.1.2.8.6 Mexico Vascular Closure Device Market, by End Users

11.2 Europe Vascular Closure Device Market, Revenue and Forecast to 2030

11.2.1 Overview

11.2.2 Europe Vascular Closure Device Market Revenue and Forecast to 2030 (US\$ Mn)

11.2.2.1 Europe Vascular Closure Device Market, by Product Type

11.2.2.1.1 Europe: Vascular Closure Device Market, by Active Approximators, 2020–2030 (US\$ Million)

11.2.2.1.2 Europe: Vascular Closure Device Market, by Passive Approximators , 2020–2030 (US\$ Million)

11.2.2.2 Europe Vascular Closure Device Market, by Access

11.2.2.3 Europe Vascular Closure Device Market, by Procedure

11.2.2.4 Europe Vascular Closure Device Market, by End Users

11.2.2.5 Europe Vascular Closure Device Market by Country

11.2.2.6 Germany

11.2.2.6.1 Overview

11.2.2.6.2 Germany Vascular Closure Device Market Revenue and Forecast to 2030 (US\$ Mn)

11.2.2.6.3 Germany Vascular Closure Device Market, by Product Type

11.2.2.6.3.1 Germany: Vascular Closure Device Market, by Active Approximators, 2020–2030 (US\$ Million)

11.2.2.6.3.2 Germany: Vascular Closure Device Market, by Passive Approximators , 2020–2030 (US\$ Million)

11.2.2.6.4 Germany Vascular Closure Device Market, by Access

11.2.2.6.5 Germany Vascular Closure Device Market, by Procedure

11.2.2.6.6 Germany Vascular Closure Device Market, by End Users

11.2.2.7 UK

11.2.2.7.1 Overview

11.2.2.7.2 UK Vascular Closure Device Market Revenue and Forecast to 2030 (US\$ Mn)

11.2.2.7.3 UK Vascular Closure Device Market, by Product Type

11.2.2.7.3.1 UK: Vascular Closure Device Market, by Active Approximators, 2020–2030 (US\$ Million)

- 11.2.2.7.3.2 UK: Vascular Closure Device Market, by Passive Approximators , 2020–2030 (US\$ Million)
 - 11.2.2.7.4 UK Vascular Closure Device Market, by Access
 - 11.2.2.7.5 UK Vascular Closure Device Market, by Procedure
 - 11.2.2.7.6 UK Vascular Closure Device Market, by End Users
- 11.2.2.8 France
 - 11.2.2.8.1 Overview
 - 11.2.2.8.2 France Vascular Closure Device Market Revenue and Forecast to 2030 (US\$ Mn)
 - 11.2.2.8.3 France Vascular Closure Device Market, by Product Type
 - 11.2.2.8.3.1 France: Vascular Closure Device Market, by Active Approximators, 2020–2030 (US\$ Million)
 - 11.2.2.8.3.2 France: Vascular Closure Device Market, by Passive Approximators , 2020–2030 (US\$ Million)
 - 11.2.2.8.4 France Vascular Closure Device Market, by Access
 - 11.2.2.8.5 France Vascular Closure Device Market, by Procedure
 - 11.2.2.8.6 France Vascular Closure Device Market, by End Users
 - 11.2.2.9 Italy
 - 11.2.2.9.1 Overview
 - 11.2.2.9.2 Italy Vascular Closure Device Market Revenue and Forecast to 2030 (US\$ Mn)
 - 11.2.2.9.3 Italy Vascular Closure Device Market, by Product Type
 - 11.2.2.9.3.1 Italy: Vascular Closure Device Market, by Active Approximators, 2020–2030 (US\$ Million)
 - 11.2.2.9.3.2 Italy: Vascular Closure Device Market, by Passive Approximators , 2020–2030 (US\$ Million)
 - 11.2.2.9.4 Italy Vascular Closure Device Market, by Access
 - 11.2.2.9.5 Italy Vascular Closure Device Market, by Procedure
 - 11.2.2.9.6 Italy Vascular Closure Device Market, by End Users
 - 11.2.2.10 Spain
 - 11.2.2.10.1 Overview
 - 11.2.2.10.2 Spain Vascular Closure Device Market Revenue and Forecast to 2030 (US\$ Mn)
 - 11.2.2.10.3 Spain Vascular Closure Device Market, by Product Type
 - 11.2.2.10.3.1 Spain: Vascular Closure Device Market, by Active Approximators, 2020–2030 (US\$ Million)
 - 11.2.2.10.3.2 Spain: Vascular Closure Device Market, by Passive Approximators , 2020–2030 (US\$ Million)
 - 11.2.2.10.4 Spain Vascular Closure Device Market, by Access

- 11.2.2.10.5 Spain Vascular Closure Device Market, by Procedure
- 11.2.2.10.6 Spain Vascular Closure Device Market, by End Users
- 11.2.2.11 Rest of Europe
 - 11.2.2.11.1 Overview
 - 11.2.2.11.2 Rest of Europe Vascular Closure Device Market Revenue and Forecast to 2030 (US\$ Mn)
 - 11.2.2.11.3 Rest of Europe Vascular Closure Device Market, by Product Type
 - 11.2.2.11.3.1 Rest of Europe: Vascular Closure Device Market, by Active Approximators, 2020–2030 (US\$ Million)
 - 11.2.2.11.3.2 Rest of Europe: Vascular Closure Device Market, by Passive Approximators , 2020–2030 (US\$ Million)
 - 11.2.2.11.4 Rest of Europe Vascular Closure Device Market, by Access
 - 11.2.2.11.5 Rest of Europe Vascular Closure Device Market, by Procedure
 - 11.2.2.11.6 Rest of Europe Vascular Closure Device Market, by End Users
- 11.3 Asia Pacific Vascular Closure Device Market, Revenue And Forecast to 2030
 - 11.3.1 Overview
 - 11.3.2 Asia Pacific Vascular Closure Device Market Revenue and Forecast to 2030 (US\$ Mn)
 - 11.3.2.1 Asia Pacific Vascular Closure Device Market, by Product Type
 - 11.3.2.1.1 Asia Pacific: Vascular Closure Device Market, by Active Approximators, 2020–2030 (US\$ Million)
 - 11.3.2.1.2 Asia Pacific: Vascular Closure Device Market, by Passive Approximators , 2020–2030 (US\$ Million)
 - 11.3.2.2 Asia Pacific Vascular Closure Device Market, by Access
 - 11.3.2.3 Asia Pacific Vascular Closure Device Market, by Procedure
 - 11.3.2.4 Asia Pacific Vascular Closure Device Market, by End Users
 - 11.3.2.5 Asia Pacific Vascular Closure Device Market by Country
 - 11.3.2.6 China
 - 11.3.2.6.1 Overview
 - 11.3.2.6.2 China Vascular Closure Device Market Revenue and Forecast to 2030 (US\$ Mn)
 - 11.3.2.6.3 China Vascular Closure Device Market, by Product Type
 - 11.3.2.6.3.1 China: Vascular Closure Device Market, by Active Approximators, 2020–2030 (US\$ Million)
 - 11.3.2.6.3.2 China: Vascular Closure Device Market, by Passive Approximators , 2020–2030 (US\$ Million)
 - 11.3.2.6.4 China Vascular Closure Device Market, by Access
 - 11.3.2.6.5 China Vascular Closure Device Market, by Procedure
 - 11.3.2.6.6 China Vascular Closure Device Market, by End Users

11.3.2.7 Japan

11.3.2.7.1 Overview

11.3.2.7.2 Japan Vascular Closure Device Market Revenue and Forecast to 2030 (US\$ Mn)

11.3.2.7.3 J

11.3.2.7.4 Japan Vascular Closure Device Market, by Product Type

11.3.2.7.4.1 Japan: Vascular Closure Device Market, by Active Approximators, 2020–2030 (US\$ Million)

11.3.2.7.4.2 Japan: Vascular Closure Device Market, by Passive Approximators , 2020–2030 (US\$ Million)

11.3.2.7.5 Japan Vascular Closure Device Market, by Access

11.3.2.7.6 Japan Vascular Closure Device Market, by Procedure

11.3.2.7.7 Japan Vascular Closure Device Market, by End Users

11.3.2.8 India

11.3.2.8.1 Overview

11.3.2.8.2 India Vascular Closure Device Market Revenue and Forecast to 2030 (US\$ Mn)

11.3.2.8.3 India Vascular Closure Device Market, by Product Type

11.3.2.8.3.1 India: Vascular Closure Device Market, by Active Approximators, 2020–2030 (US\$ Million)

11.3.2.8.3.2 India: Vascular Closure Device Market, by Passive Approximators , 2020–2030 (US\$ Million)

11.3.2.8.4 India Vascular Closure Device Market, by Access

11.3.2.8.5 India Vascular Closure Device Market, by Procedure

11.3.2.8.6 India Vascular Closure Device Market, by End Users

11.3.2.9 Australia

11.3.2.9.1 Overview

11.3.2.9.2 Australia Vascular Closure Device Market Revenue and Forecast to 2030 (US\$ Mn)

11.3.2.9.3 Australia Vascular Closure Device Market, by Product Type

11.3.2.9.3.1 Australia: Vascular Closure Device Market, by Active Approximators, 2020–2030 (US\$ Million)

11.3.2.9.3.2 Australia: Vascular Closure Device Market, by Passive Approximators , 2020–2030 (US\$ Million)

11.3.2.9.4 Australia Vascular Closure Device Market, by Access

11.3.2.9.5 Australia Vascular Closure Device Market, by Procedure

11.3.2.9.6 Australia Vascular Closure Device Market, by End Users

11.3.2.10 South Korea

11.3.2.10.1 Overview

11.3.2.10.2 South Korea Vascular Closure Device Market Revenue and Forecast to 2030 (US\$ Mn)

11.3.2.10.3 South Korea Vascular Closure Device Market, by Product Type

11.3.2.10.3.1 South Korea: Vascular Closure Device Market, by Active Approximators, 2020–2030 (US\$ Million)

11.3.2.10.3.2 South Korea: Vascular Closure Device Market, by Passive Approximators , 2020–2030 (US\$ Million)

11.3.2.10.4 South Korea Vascular Closure Device Market, by Access

11.3.2.10.5 South Korea Vascular Closure Device Market, by Procedure

11.3.2.10.6 South Korea Vascular Closure Device Market, by End Users

11.3.2.11 Rest of Asia Pacific

11.3.2.11.1 Overview

11.3.2.11.2 Rest of Asia Pacific Vascular Closure Device Market Revenue and Forecast to 2030 (US\$ Mn)

11.3.2.11.3 Rest of Asia Pacific Vascular Closure Device Market, by Product Type

11.3.2.11.3.1 Rest of Asia Pacific: Vascular Closure Device Market, by Active Approximators, 2020–2030 (US\$ Million)

11.3.2.11.3.2 Rest of Asia Pacific: Vascular Closure Device Market, by Passive Approximators , 2020–2030 (US\$ Million)

11.3.2.11.4 Rest of Asia Pacific Vascular Closure Device Market, by Access

11.3.2.11.5 Rest of Asia Pacific Vascular Closure Device Market, by Procedure

11.3.2.11.6 Rest of Asia Pacific Vascular Closure Device Market, by End Users

11.4 Middle East & Africa Vascular Closure Device Market, Revenue And Forecast to 2030

11.4.1 Overview

11.4.2 Middle East & Africa Vascular Closure Device Market Revenue and Forecast to 2030 (US\$ Mn)

11.4.2.1 Middle East & Africa Vascular Closure Device Market, by Product Type

11.4.2.1.1 Middle East & Africa: Vascular Closure Device Market, by Active Approximators, 2020–2030 (US\$ Million)

11.4.2.1.2 Middle East & Africa: Vascular Closure Device Market, by Passive Approximators , 2020–2030 (US\$ Million)

11.4.2.2 Middle East & Africa Vascular Closure Device Market, by Access

11.4.2.3 Middle East & Africa Vascular Closure Device Market, by Procedure

11.4.2.4 Middle East & Africa Vascular Closure Device Market, by End Users

11.4.2.5 Middle East & Africa Vascular Closure Device Market by Country

11.4.2.6 UAE

11.4.2.6.1 Overview

11.4.2.6.2 UAE Vascular Closure Device Market Revenue and Forecast to 2030

(US\$ Mn)

11.4.2.6.3 UAE Vascular Closure Device Market, by Product Type

11.4.2.6.3.1 UAE: Vascular Closure Device Market, by Active Approximators, 2020–2030 (US\$ Million)

11.4.2.6.3.2 UAE: Vascular Closure Device Market, by Passive Approximators , 2020–2030 (US\$ Million)

11.4.2.6.4 UAE Vascular Closure Device Market, by Access

11.4.2.6.5 UAE Vascular Closure Device Market, by Procedure

11.4.2.6.6 UAE Vascular Closure Device Market, by End Users

11.4.2.7 Saudi Arabia

11.4.2.7.1 Overview

11.4.2.7.2 Saudi Arabia Vascular Closure Device Market Revenue and Forecast to 2030 (US\$ Mn)

11.4.2.7.3 Saudi Arabia Vascular Closure Device Market, by Product Type

11.4.2.7.3.1 Saudi Arabia: Vascular Closure Device Market, by Active Approximators, 2020–2030 (US\$ Million)

11.4.2.7.3.2 Saudi Arabia: Vascular Closure Device Market, by Passive Approximators , 2020–2030 (US\$ Million)

11.4.2.7.4 Saudi Arabia Vascular Closure Device Market, by Access

11.4.2.7.5 Saudi Arabia Vascular Closure Device Market, by Procedure

11.4.2.7.6 Saudi Arabia Vascular Closure Device Market, by End Users

11.4.2.8 South Africa

11.4.2.8.1 Overview

11.4.2.8.2 South Africa Vascular Closure Device Market Revenue and Forecast to 2030 (US\$ Mn)

11.4.2.8.3 South Africa Vascular Closure Device Market, by Product Type

11.4.2.8.3.1 South Africa: Vascular Closure Device Market, by Active Approximators, 2020–2030 (US\$ Million)

11.4.2.8.3.2 South Africa: Vascular Closure Device Market, by Passive Approximators , 2020–2030 (US\$ Million)

11.4.2.8.4 South Africa Vascular Closure Device Market, by Access

11.4.2.8.5 South Africa Vascular Closure Device Market, by Procedure

11.4.2.8.6 South Africa Vascular Closure Device Market, by End Users

11.4.2.9 Rest of Middle East & Africa

11.4.2.9.1 Overview

11.4.2.9.2 Rest of Middle East & Africa Vascular Closure Device Market Revenue and Forecast to 2030 (US\$ Mn)

11.4.2.9.3 Rest of Middle East & Africa Vascular Closure Device Market, by Product Type

11.4.2.9.3.1 Rest of Middle East & Africa: Vascular Closure Device Market, by Active Approximators, 2020–2030 (US\$ Million)

11.4.2.9.3.2 Rest of Middle East & Africa: Vascular Closure Device Market, by Passive Approximators , 2020–2030 (US\$ Million)

11.4.2.9.4 Rest of Middle East & Africa Vascular Closure Device Market, by Access

11.4.2.9.5 Rest of Middle East & Africa Vascular Closure Device Market, by Procedure

11.4.2.9.6 Rest of Middle East & Africa Vascular Closure Device Market, by End Users

11.5 South & Central America Vascular Closure Device Market, Revenue And Forecast to 2030

11.5.1 Overview

11.5.2 South & Central America Vascular Closure Device Market Revenue and Forecast to 2030 (US\$ Mn)

11.5.2.1 South & Central America Vascular Closure Device Market, by Product Type

11.5.2.1.1 South & Central America: Vascular Closure Device Market, by Active Approximators, 2020–2030 (US\$ Million)

11.5.2.1.2 South & Central America: Vascular Closure Device Market, by Passive Approximators , 2020–2030 (US\$ Million)

11.5.2.2 South & Central America Vascular Closure Device Market, by Access

11.5.2.3 South & Central America Vascular Closure Device Market, by Procedure

11.5.2.4 South & Central America Vascular Closure Device Market, by End Users

11.5.2.5 South & Central America Vascular Closure Device Market by Country

11.5.2.6 Brazil

11.5.2.6.1 Overview

11.5.2.6.2 Brazil Vascular Closure Device Market Revenue and Forecast to 2030 (US\$ Mn)

11.5.2.6.3 Brazil Vascular Closure Device Market, by Product Type

11.5.2.6.3.1 Brazil: Vascular Closure Device Market, by Active Approximators, 2020–2030 (US\$ Million)

11.5.2.6.3.2 Brazil: Vascular Closure Device Market, by Passive Approximators , 2020–2030 (US\$ Million)

11.5.2.6.4 Brazil Vascular Closure Device Market, by Access

11.5.2.6.5 Brazil Vascular Closure Device Market, by Procedure

11.5.2.6.6 Brazil Vascular Closure Device Market, by End Users

11.5.2.7 Argentina

11.5.2.7.1 Overview

11.5.2.7.2 Argentina Vascular Closure Device Market Revenue and Forecast to 2030 (US\$ Mn)

- 11.5.2.7.3 Argentina Vascular Closure Device Market, by Product Type
 - 11.5.2.7.3.1 Argentina: Vascular Closure Device Market, by Active Approximators, 2020–2030 (US\$ Million)
 - 11.5.2.7.3.2 Argentina: Vascular Closure Device Market, by Passive Approximators , 2020–2030 (US\$ Million)
 - 11.5.2.7.4 Argentina Vascular Closure Device Market, by Access
 - 11.5.2.7.5 Argentina Vascular Closure Device Market, by Procedure
 - 11.5.2.7.6 Argentina Vascular Closure Device Market, by End Users
- 11.5.2.8 Rest of South & Central America
 - 11.5.2.8.1 Overview
 - 11.5.2.8.2 Rest of South & Central America Vascular Closure Device Market Revenue and Forecast to 2030 (US\$ Mn)
 - 11.5.2.8.3 Rest of South & Central America Vascular Closure Device Market, by Product Type
 - 11.5.2.8.3.1 Rest of South & Central America: Vascular Closure Device Market, by Active Approximators, 2020–2030 (US\$ Million)
 - 11.5.2.8.3.2 Rest of South & Central America: Vascular Closure Device Market, by Passive Approximators , 2020–2030 (US\$ Million)
 - 11.5.2.8.4 Rest of South & Central America Vascular Closure Device Market, by Access
 - 11.5.2.8.5 Rest of South & Central America Vascular Closure Device Market, by Procedure
 - 11.5.2.8.6 Rest of South & Central America Vascular Closure Device Market, by End Users

12. VASCULAR CLOSURE DEVICE MARKET INDUSTRY LANDSCAPE

- 12.1 Overview
- 12.2 Growth Strategies in the Vascular Closure Devices Market
- 12.3 Inorganic Growth Strategies
 - 12.3.1 Overview
- 12.4 Organic Growth Strategies
 - 12.4.1 Overview

13. COMPANY PROFILES

- 13.1 Cordis Corp
 - 13.1.1 Key Facts
 - 13.1.2 Business Description

- 13.1.3 Products and Services
- 13.1.4 Financial Overview
- 13.1.5 SWOT Analysis
- 13.1.6 Key Developments
- 13.2 Transluminal Technologies LLC
 - 13.2.1 Key Facts
 - 13.2.2 Business Description
 - 13.2.3 Products and Services
 - 13.2.4 Financial Overview
 - 13.2.5 SWOT Analysis
 - 13.2.6 Key Developments
- 13.3 Vasorum Ltd
 - 13.3.1 Key Facts
 - 13.3.2 Business Description
 - 13.3.3 Products and Services
 - 13.3.4 Financial Overview
 - 13.3.5 SWOT Analysis
 - 13.3.6 Key Developments
- 13.4 Haemonetics Corp
 - 13.4.1 Key Facts
 - 13.4.2 Business Description
 - 13.4.3 Products and Services
 - 13.4.4 Financial Overview
 - 13.4.5 SWOT Analysis
 - 13.4.6 Key Developments
- 13.5 Abbott Laboratories
 - 13.5.1 Key Facts
 - 13.5.2 Business Description
 - 13.5.3 Products and Services
 - 13.5.4 Financial Overview
 - 13.5.5 SWOT Analysis
 - 13.5.6 Key Developments
- 13.6 Becton Dickinson and Co
 - 13.6.1 Key Facts
 - 13.6.2 Business Description
 - 13.6.3 Products and Services
 - 13.6.4 Financial Overview
 - 13.6.5 SWOT Analysis
 - 13.6.6 Key Developments

13.7 Cardinal Health Inc

13.7.1 Key Facts

13.7.2 Business Description

13.7.3 Products and Services

13.7.4 Financial Overview

13.7.5 SWOT Analysis

13.7.6 Key Developments

13.8 ENDOCOR GmbH & CO KG

13.8.1 Key Facts

13.8.2 Business Description

13.8.3 Products and Services

13.8.4 Financial Overview

13.8.5 SWOT Analysis

13.8.6 Key Developments

13.9 Medtronic Plc

13.9.1 Key Facts

13.9.2 Business Description

13.9.3 Products and Services

13.9.4 Financial Overview

13.9.5 SWOT Analysis

13.9.6 Key Developments

13.10 Teleflex Inc

13.10.1 Key Facts

13.10.2 Business Description

13.10.3 Products and Services

13.10.4 Financial Overview

13.10.5 SWOT Analysis

13.10.6 Key Developments

14. APPENDIX

14.1 About Us

14.2 Glossary of Terms

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