

EMEA Fibrin Sealant Market Size, Share, Competitive Landscape and Trend Analysis Report, by Dosage Form, Application and End User : Opportunity Analysis and Industry Forecast, 2024-2035

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Report description:

The EMEA fibrin sealant market size was valued at \$0.13 billion in 2023 and is projected to reach \$0.30 billion by 2035, registering a CAGR of 7.0% from 2024 to 2035. The growth of the EMEA fibrin sealant market is driven by rise in prevalence for cardiovascular, cancer, orthopedic, and other chronic illnesses. For instance, the European Cancer Information System (ECIS) reported 435,114 cancer cases in 2022, with projections estimating increase to 518,490 cases by 2040. A fibrin sealant is a medical adhesive utilized in surgical procedures to control bleeding, enhance wound healing, and seal tissues. It comprises two primary components, namely fibrinogen and thrombin, which, when mixed, mimic the final stages of the body's natural blood clotting process. This reaction creates a stable clot at the application site, effectively stopping bleeding and aiding in tissue adhesion. Fibrin sealants are highly versatile and are used in various surgeries where precision and effective hemostasis are essential. They are particularly advantageous in situations where sutures or staples alone are insufficient, helping to reduce the risk of postoperative complications and improve overall surgical outcomes.

Key Takeaways

On the basis of dosage form, the liquid segment dominated the market share in 2023. However, the patch segment is anticipated to grow at the highest CAGR during the forecast period.

On the basis of application, the general surgery segment dominated the market share in 2023. However, the others segment is anticipated to grow at the highest CAGR during the forecast period.

On the basis of end user, the hospitals segment dominated the market share in 2023. However, the ambulatory surgical centers segment is anticipated to grow at the highest CAGR during the forecast period.

Country-wise, Germany dominated the market share in 2023. However, South Africa is anticipated to grow at the highest CAGR during the forecast period.□

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Market Dynamics

The EMEA (Europe, Middle East, and Africa) fibrin sealant market is experiencing significant growth, driven by several key factors, such as increase in volume of complex surgical procedures across the region, necessitating effective hemostatic agents like fibrin sealants. These sealants play a crucial role in controlling bleeding and enhancing tissue sealing, which is vital in surgeries where precision and effective hemostasis are critical.

In Europe, countries such as Germany and the UK are leading contributors to this growth. The German Society for Thoracic and Cardiovascular Surgery reports over 100,000 surgeries performed annually, emphasizing the extensive use of fibrin sealants in complex cardiovascular and thoracic procedures. The demand for these sealants is driven by their ability to reduce intraoperative bleeding, minimize complications, and promote faster healing, which is particularly important in high-risk surgeries where patient outcomes are closely tied to the effectiveness of hemostatic agents.

Similarly, the UK has seen a notable rise in orthopedic surgeries, particularly knee replacements, with the National Health Service (NHS) reporting approximately 70,000 procedures carried out annually. The growing demand for fibrin sealants in these surgeries is fueled by their effectiveness in enhancing surgical efficiency and improving patient recovery. As orthopedic procedures increase, the need for reliable hemostatic solutions that can minimize blood loss and promote tissue adhesion becomes more critical, further propelling the market for fibrin sealants.

Beyond these specific examples, the overall rise in the prevalence of chronic diseases across the EMEA region is contributing to increase in surgical procedures. Chronic conditions such as cardiovascular diseases, cancer, and musculoskeletal disorders often require surgical intervention, where fibrin sealants are utilized to ensure effective hemostasis and reduce the risk of postoperative complications. As the population ages and the incidence of these conditions rises, the demand for surgical procedures, and by extension, fibrin sealants, is expected to grow.

However, fibrin sealants are often expensive, which can limit their adoption, especially in regions with budget constraints or where healthcare systems are underfunded. In addition, availability of alternative hemostatic agents, such as synthetic sealants and traditional methods like sutures and staples, can also reduce demand. Regulatory challenges and the stringent approval process for new products further hinder the market expansion, as manufacturers face delays in bringing innovative solutions to the market.

Moreover, advancements in surgical techniques, particularly the shift towards minimally invasive procedures, are also driving the adoption of fibrin sealants. These procedures often require precise hemostasis in challenging anatomical locations, making fibrin sealants a preferred choice for surgeons. As healthcare systems across the EMEA region continue to adopt these advanced surgical techniques, the market for fibrin sealants is likely to expand further.

In addition, rise in initiatives taken by key players is significantly driving the growth of the EMEA fibrin sealant market. In February 2024, Principal Technologies Inc. entered into a binding Share Purchase Agreement (SPA) to acquire 100% of the equity interests in Vivostat, a Danish company with 23 years of experience in developing a unique autologous fibrin sealant solution for post-surgical use. This acquisition marks a significant expansion of Principal Technologies' portfolio in advanced surgical solutions, allowing them to leverage Vivostat's expertise and innovative products. Such initiatives enhance product offerings as well as strengthen the competitive position of key players in the market, further driving the EMEA fibrin sealant market growth.

Segmental Overview

The EMEA fibrin sealant market is segmented into dosage form, application, end user, and country. On the basis of dosage form, it is segmented into liquid, patch, and powder. The liquid segment is further segmented into frozen fibrin sealants and freeze dried

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fibrin sealants. On the basis of application, the market is classified into general surgery, cardiovascular surgery, wound management, orthopedic surgery, urological surgeries, ophthalmic surgeries, and others. On the basis of end user, it is divided into hospitals, ambulatory surgical centers, and others. On the basis of country, it is segmented into Germany, France, U.K, Italy, Spain, South Africa, Saudi Arabia, and Rest of EMEA.

By Dosage Form

The liquid segment dominated the market share in 2023. This is attributed to its ease of application, versatility in various surgical procedures, and rapid action in achieving hemostasis. Its adaptability for both open and minimally invasive surgeries made it the preferred choice among surgeons, driving its market dominance.

However, the patch segment is expected to register the highest CAGR during the forecast period owing to its ease of use, ability to provide targeted application, and effectiveness in reducing bleeding and fluid leakage. In addition, patches offer enhanced stability and adherence in challenging surgical environments, driving their increasing adoption.

By Application

The general surgery segment dominated the market share in 2023, owing to high volume of procedures such as abdominal, gastrointestinal, and cancer surgeries, where fibrin sealants play a vital role in controlling bleeding and sealing tissues. The growing adoption of minimally invasive techniques and rise in demand for effective hemostasis products further bolstered the segment's strong market position.

However, the others segment is expected to register the highest CAGR during the forecast period owing to increase in demand for advanced surgical techniques and cosmetic procedures. Fibrin sealants are rapidly being adopted in these areas because they enhance wound healing, improve aesthetic outcomes, and provide precise control of bleeding, fueling their growth.

By End User

The hospitals segment dominated the market share in 2023, owing to their high volume of surgical procedures, advanced infrastructure, and expertise in complex operations. Hospitals frequently require fibrin sealants for effective hemostasis and tissue sealing, making them major consumers. Their capacity to integrate cutting-edge medical technologies and manage large patient volumes further reinforces their leading position.

However, the ambulatory surgical centers segment is expected to register the highest CAGR during the forecast period owing to the increasing demand for cost-effective, efficient, and minimally invasive procedures. ASCs provide faster recovery times, shorter hospital stays, and lower overall costs, contributing to their rapid growth and rising popularity.

By Country

Germany dominated the market share in 2023, owing to high volume of complex surgical procedures, advanced healthcare infrastructure, and significant investment in medical technologies, including fibrin sealants, which are widely used to improve surgical outcomes and patient care. However, the South Africa is expected to register the highest CAGR during the forecast period owing to increase in healthcare investments, rise in awareness of advanced surgical techniques, and growing incidence of chronic diseases requiring surgical interventions.

Competition Analysis

Competitive analysis and profiles of the major players in the EMEA fibrin sealant market include Baxter International Inc., Johnson and Johnson, CSL, Corza Medical, Vivostat A/S, Grifols S.A., Kuros Biosciences, Reliance Life Sciences, ICHOR, and Astflick Group Limited. These companies have adopted various strategies such as agreement, acquisition, clinical trial, and merger to expand their product portfolio.[]

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Recent Developments in EMEA fibrin sealant Industry

In April 2023, Corza Medical announced that it has entered into a definitive agreement with a subsidiary of Takeda Pharmaceuticals Company to acquire the TachoSil manufacturing operations in Linz, Austria. Corza Medical had previously acquired the commercial product rights for TachoSil, a best-in-class surgical patch trusted by medical professionals worldwide, in January 2021. Corza Medical shares Takeda's commitment to patient care and has the experience and resources to continue investing in TachoSil for the benefit of patients.

In July 2024, Corza Medical successfully closed its previously announced acquisition of the TachoSil manufacturing operations in Linz, Austria, part of Takeda's global production network. TachoSil is a best-in-class surgical patch trusted by medical professionals across the globe.

In April 2022, Grifols announced the completion of the acquisition of 100% of the share capital of Tiancheng (Germany) Pharmaceutical Holdings AG, a German company that holds 89.88% of the ordinary shares and 1.08% of the preferred shares of Biotest AG, a European healthcare company specialized in innovative hematology and clinical immunology. The Biotest acquisition strengthened global plasma capacity, expanding product portfolio to benefit more patients, complementing innovation efforts.

Table of Contents:

Chapter 1: Introduction..	29
1.1. Report description.	29
1.2. Key market segments.	31
1.2.1. Key market players profiled in the report	33
1.3. Key benefits for stakeholders.	34
1.4. Research methodology.	34
1.4.1. Secondary research..	36
1.4.2. Primary research..	37
1.4.3. Analyst tools and models.	38
Chapter 2: Executive summary.	39
2.1. Key findings of the study.	42
2.2. CXO perspective.	44
Chapter 3: Market overview...	45
3.1. Market definition and scope.	45
3.2. Key findings.	47
3.2.1. Top investment pockets.	47
3.3. Porter's five forces analysis.	49
3.3.1. Bargaining power of suppliers.	49
3.3.2. Bargaining power of buyers.	50
3.3.3. Threat of substitution..	51
3.3.4. Threat of new entrants.	52
3.3.5. Intensity of competitive rivalry.	53
3.4. Market dynamics.	54
3.4.1. Drivers.	54
3.4.1.1. Rise in number of surgical procedures.	54
3.4.1.2. Growing initiative taken by key player	55
3.4.1.3. Rise in adoption of minimally invasive surgeries.	56
3.4.2. Restraint	57
3.4.2.1. High cost of fibrin sealant	57
3.4.3. Opportunity.	57
3.4.3.1. Product Expansion in Emerging Markets.	57
3.4.4. Impact Analysis.	59

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3.5. EMEA Brand Wise Fibrin Sealant Sales, 2023 (\$ Million)	60
3.6. Global Hemostats Market, 2023-2035 (USD Million)	61
3.6.1. Global Hemostats Market, by Type, 2023-2035 (\$ Million)	61
3.6.2. Global Hemostats Market, by Formulation, 2023-2035 (\$ Million)	62
3.6.3. Global Hemostats Market, by Application, 2023-2035 (\$ Million)	63
3.6.4. Global Hemostats Market, by Region, 2023-2035 (\$ Million)	64
Chapter 4: EMEA fibrin sealant, BY Dosage Form..	65
4.1. Overview..	65
4.1.1. Market size and forecast, Value.	67
4.2. Liquid.	68
4.2.1. Key market trends and growth factors.	68
4.2.1.1. Market size and forecast, by liquid fibrin sealant, by type.	69
4.2.1.2. Frozen fibrin sealants.	70
4.2.1.3. Freeze-dried fibrin sealants.	70
4.2.2. Market size and forecast, by region..	71
4.2.3. Market share analysis, by country.	72
4.3. Patch.	73
4.3.1. Key market trends, growth factors, and opportunities.	73
4.3.2. Market size and forecast, by region..	74
4.3.3. Market share analysis, by country.	75
4.4. Powder.	76
4.4.1. Key market trends, growth factors, and opportunities.	76
4.4.2. Market size and forecast, by region..	76
4.4.3. Market share analysis, by country.	77
Chapter 5: EMEA fibrin sealant, BY Application..	78
5.1. Overview..	78
5.1.1. Market size and forecast	80
5.2. General surgery.	81
5.2.1. Key market trends, growth factors, and opportunities.	81
5.2.2. Market size and forecast, by region..	82
5.2.3. Market share analysis, by country.	83
5.3. Cardiovascular surgery.	84
5.3.1. Key market trends, growth factors, and opportunities.	84
5.3.2. Market size and forecast, by region..	85
5.3.3. Market share analysis, by country.	86
5.4. Wound management	87
5.4.1. Key market trends, growth factors, and opportunities.	87
5.4.2. Market size and forecast, by region..	88
5.4.3. Market share analysis, by country.	89
5.5. Orthopedic surgery.	90
5.5.1. Key market trends, growth factors, and opportunities.	90
5.5.2. Market size and forecast, by region..	91
5.5.3. Market share analysis, by country.	92
5.6. Urological surgeries.	93
5.6.1. Key market trends, growth factors, and opportunities.	93
5.6.2. Market size and forecast, by region..	94
5.6.3. Market share analysis, by country.	95

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5.7. Ophthalmic Surgeries.	96
5.7.1. Key market trends, growth factors, and opportunities.	96
5.7.2. Market size and forecast, by region..	97
5.7.3. Market share analysis, by country.	98
5.8. Others.	99
5.8.1. Key market trends, growth factors, and opportunities.	99
5.8.2. Market size and forecast, by region..	100
5.8.3. Market share analysis, by country.	101
Chapter 6: EMEA fibrin sealant, BY end user.	102
6.1. Overview..	102
6.1.1. Market size and forecast	104
6.2. Hospitals.	105
6.2.1. Key market trends, growth factors, and opportunities.	105
6.2.2. Market size and forecast, by region..	106
6.2.3. Market share analysis, by country.	107
6.3. Ambulatory surgical center.	108
6.3.1. Key market trends, growth factors, and opportunities.	108
6.3.2. Market size and forecast, by region..	109
6.3.3. Market share analysis, by country.	110
6.4. Clinics.	111
6.4.1. Key market trends, growth factors, and opportunities.	111
6.4.2. Market size and forecast, by region..	111
6.4.3. Market share analysis, by country.	112
Chapter 7: EMEA fibrin sealant market, BY region..	113
7.1. Overview..	113
7.1.1. Market size and forecast	114
7.2. EMEA..	115
7.2.1. Key market trends, growth factors, and opportunities.	115
7.2.2. Market size and forecast, by dosage Form...	117
7.2.3. Market size and forecast, by application..	118
7.2.4. Market size and forecast, by end user.	119
7.2.5. Market size and forecast, by country.	120
7.2.5.1. Germany.	121
7.2.5.1.1. Market size and forecast, by dosage Form...	121
7.2.5.1.2. Market size and forecast, by application.	122
7.2.5.1.3. Market size and forecast, by end user	123
7.2.5.2. France.	124
7.2.5.2.1. Market size and forecast, by dosage Form...	124
7.2.5.2.2. Market size and forecast, by application.	125
7.2.5.2.3. Market size and forecast, by end user	126
7.2.5.3. UK.	127
7.2.5.3.1. Market size and forecast, by dosage Form...	127
7.2.5.3.2. Market size and forecast, by application.	128
7.2.5.3.3. Market size and forecast, by end user	129
7.2.5.4. Italy.	130
7.2.5.4.1. Market size and forecast, by dosage Form...	130
7.2.5.4.2. Market size and forecast, by application.	131

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7.2.5.4.3. Market size and forecast, by end user	132
7.2.5.5. Spain.	133
7.2.5.5.1. Market size and forecast, by dosage Form...	133
7.2.5.5.2. Market size and forecast, by application.	134
7.2.5.5.3. Market size and forecast, by end user	135
7.2.5.6. South Africa.	136
7.2.5.6.1. Market size and forecast, by dosage Form...	136
7.2.5.6.2. Market size and forecast, by application.	137
7.2.5.6.3. Market size and forecast, by end user	138
7.2.5.7. Saudi Arabia.	139
7.2.5.7.1. Market size and forecast, by dosage Form...	139
7.2.5.7.2. Market size and forecast, by application.	140
7.2.5.7.3. Market size and forecast, by end user	141
7.2.5.8. Rest of EMEA..	142
7.2.5.8.1. Market size and forecast, by dosage Form...	142
7.2.5.8.2. Market size and forecast, by application.	143
7.2.5.8.3. Market size and forecast, by end user	144
Chapter 8: COMPETITIVE LANDSCAPE.	145
8.1. Introduction.	145
8.2. Top winning strategies.	145
8.2.1. Top winning strategies, by year, 2021-2024*.	146
8.2.2. Top winning strategies, by development, 2021-2024*(%)	147
8.2.3. Top winning strategies, by company, 2021-2024*.	148
8.3. Product mapping of top 10 player.	149
8.4. Competitive dashboard.	150
8.5. Competitive heatmap.	151
8.6. Top player positioning.	152
Chapter 9: COMPANY PROFILES.	153
9.1. BAXTER INTERNATIONAL INC.	153
9.1.1. Company overview..	153
9.1.2. Key executives.	154
9.1.3. Company snapshot	154
9.1.4. Operating business segments.	155
9.1.5. Product portfolio..	155
9.1.6. Business Performance.	156
9.2. JOHNSON AND JOHNSON..	158
9.2.1. Company overview..	158
9.2.2. Key executives.	158
9.2.3. Company snapshot	159
9.2.4. Operating business segments.	159
9.2.5. Product portfolio..	160
9.2.6. Business Performance.	161
9.3. CSL.	163
9.3.1. Company overview..	163
9.3.2. Key executives.	163
9.3.3. Company snapshot	164
9.3.4. Operating business segments.	164

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9.3.5. Product portfolio..	165
9.3.6. Business Performance.	166
9.4. CORZA MEDICAL.	168
9.4.1. Company overview..	168
9.4.2. Key executives.	168
9.4.3. Company snapshot	169
9.4.4. Operating business segment	169
9.4.5. Product portfolio..	169
9.4.6. Key strategic moves and developments.	170
9.5. VIVOSTAT A/S.	171
9.5.1. Company overview..	171
9.5.2. Key executives.	171
9.5.3. Company snapshot	172
9.5.4. Operating business segment	172
9.5.5. Product portfolio..	172
9.5.6. Key strategic moves and developments.	173
9.6. GRIFOLS, S.A.	174
9.6.1. Company overview..	174
9.6.2. Key executives.	174
9.6.3. Company snapshot	175
9.6.4. Operating business segments.	175
9.6.5. Product portfolio..	176
9.6.6. Business Performance.	177
9.6.7. Key strategic moves and developments.	179
9.7. KUROS BIOSCIENCES.	180
9.7.1. Company overview..	180
9.7.2. Key executives.	181
9.7.3. Company snapshot	181
9.7.4. Operating business segments.	182
9.7.5. Product portfolio..	182
9.7.6. Business Performance.	183
9.7.7. Key strategic moves and developments.	185
9.8. RELIANCE LIFE SCIENCES.	186
9.8.1. Company overview..	186
9.8.2. Key executives.	187
9.8.3. Company snapshot	187
9.8.4. Operating business segment	187
9.8.5. Product portfolio..	188
9.9. ICHOR.	189
9.9.1. Company overview..	189
9.9.2. Key executives.	190
9.9.3. Company snapshot	190
9.9.4. Operating business segment	190
9.9.5. Product portfolio..	191
9.10. ASTFLICK GROUP LIMITED..	192
9.10.1. Company overview..	192
9.10.2. Key executives.	192

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9.10.3. Company snapshot	193
9.10.4. Operating business segments.	193
9.10.5. Product portfolio..	194

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