

Biosurgery Market by Product (Bone Graft Substitutes, Sealants (Natural (Gelatin, Collagen)), Hemostatic Agents, Soft-tissue Attachments (Synthetic, Biological)), Application (Orthopedic, Urological), End User (Hospitals, ASCs) - Global Forecast to 2030

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Report description:

The global biosurgery market is projected to reach USD 21.59 million by 2030 from USD 15.83 million in 2025, at a CAGR of 6.4% during the forecast period. The biosurgery market is experiencing robust growth, propelled by several key dynamics. A primary driver is the increasing prevalence of chronic conditions that necessitate surgical interventions, alongside a rise in severe traumatic injuries. As these incidents become more common, there is a corresponding uptick in the volume of elective surgical procedures, subsequently fueling the demand for biosurgical products. Moreover, the escalating need for efficient blood loss management and the enhanced availability of advanced biosurgical technologies further support market expansion. However, this growth trajectory faces challenges, including the high cost associated with biosurgery products, a shortage of adequately skilled professionals, and a stringent regulatory environment, all of which are anticipated to hinder the market's progress over the forecast period.

<https://www.marketsandmarkets.com/Images/biosurgery-market-Overview.webp>

The demineralized bone matrix subsegment, by bone graft substitutes, held the largest market share in 2024. Based on product, the biosurgery market is divided into bone-graft substitutes, soft-tissue attachments, hemostatic agents, surgical sealants and adhesives, adhesion barriers, and staple-line reinforcement agents. In 2024, the bone graft substitute market was predominantly led by the demineralized bone matrix (DBM) segment, which is recognized for its dual osteoconductive and osteoinductive properties, thereby facilitating effective bone regeneration. Within the broader category of bone graft

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substitutes-which includes synthetic grafts, bone morphogenetic proteins (BMPs), and other alternatives-DBM has emerged as the most significant player in the biosurgery sector. DBM is extensively employed in various orthopedic procedures, such as spinal fusion and hip & knee replacements, owing to its enhanced clinical efficacy in promoting bone healing. Its versatility is further accentuated by its availability in multiple forms, including pastes, putty, sheets, and flexible fragments, allowing for tailored surgical applications. The process of creating DBM involves the removal of inorganic minerals from allograft bones, which unveils BMPs that actively stimulate osteogenesis. This characteristic positions DBM as a reliable and biologically active substitute for autografts. Furthermore, implementing terminal sterilization techniques, such as gamma irradiation and electron-beam sterilization, ensures the safety and integrity of the product. The sustained preference of surgeons for DBM as a safe, effective, and accessible graft substitute continues to reinforce its leading status within this market segment.

The ambulatory surgical centers of the biosurgery end user market are expected to command the highest CAGR during the study period.

The biosurgery market, based on end users, is divided into ambulatory surgical centers (ASCs), hospitals, clinics, and other end users. The ambulatory surgical centers (ASCs) segment is anticipated to lead growth in the biosurgery market throughout the forecast period. This expansion is underpinned by an increasing demand for cost-effective, efficient, and minimally invasive surgical options. ASCs present an economically viable alternative to traditional hospitals while upholding high standards for surgical safety and clinical outcomes, making them increasingly appealing to patients and healthcare practitioners. These centers are optimally equipped to perform various outpatient procedures, including orthopedic, ophthalmic, cosmetic, and general surgeries. In these settings, biosurgical products such as sealants, hemostats, and adhesion barriers are critical in enhancing surgical precision and promoting patient recovery. Advancements in surgical techniques, anesthesia, and biosurgical technologies accelerate the ongoing transition of surgical volumes from inpatient environments to outpatient facilities. Factors such as rising healthcare expenditures, advantageous reimbursement policies for outpatient procedures, and reduced patient recovery times are further driving the growth of ASCs. As patient preferences increasingly lean toward expedited, same-day procedures with a minimized risk of hospital-acquired infections, the demand for biosurgical solutions in ASCs is projected to escalate, thus propelling rapid growth in this segment.

In 2024, the North America region accounted for the largest share in the biosurgery market.

The global biosurgery market is segmented into five major regions: North America, Europe, the Asia Pacific, Latin America, and the Middle East & Africa. In 2024, the North American region is projected to maintain the largest share of the global biosurgery market, attributable to its sophisticated healthcare infrastructure, elevated surgical rates, and the concentration of prominent industry players. This region has experienced notable increases in cosmetic and reconstructive surgeries and a marked rise in orthopedic procedures. According to Discovery ABA, approximately 26.2 million surgical and minimally invasive cosmetic and reconstructive procedures were performed in the United States in 2022, reflecting a 19% increase in cosmetic surgeries compared to 2019. Furthermore, the 2022 data from the American Joint Replacement Registry (AJRR) highlights over 2.8 million hip and knee procedures conducted across all 50 states and the District of Columbia, underscoring the significant demand for biosurgery products in joint replacement and orthopedic applications. Key drivers for this market expansion include a growing geriatric population, a high incidence of chronic diseases, and an increasing volume of surgical interventions necessitating advanced hemostatic agents, sealants, and materials for soft tissue repair. Coupled with favorable reimbursement frameworks, heightened patient awareness, and substantial R&D investments from leading companies such as Johnson & Johnson, Baxter, and Stryker, North America is solidifying its position as the most dominant and mature biosurgery market globally.

A breakdown of the primary participants referred to for this report is provided below:

-□By Company Type: Tier 1- 40%, Tier 2- 30%, and Tier 3- 30%

-□By Designation: C-level- 50%, Director level- 30%, and Others- 20%

-□By Region: North America- 30%, Europe- 25%, Asia Pacific- 20%, Latin America- 15%, and Middle East & Africa- 10%.

Note 1: Companies are classified into tiers based on their total revenue. As of 2024, Tier 1 = >USD 10.0 billion, Tier 2 = USD 1.0 billion to USD 10.0 billion, and Tier 3 = <USD 1.0 billion.

Note 2: C-level primaries include CEOs, CFOs, COOs, and VPs.

Note 3: Others include sales managers, marketing managers, business development managers, product managers, distributors, and suppliers.

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The players operating in the biosurgery market include Johnson & Johnson Services, Inc. (US), Baxter (US), Medtronic (Ireland), Becton, Dickinson and Company (BD) (US), B. Braun Melsungen AG (Germany), Stryker (US), Integra Lifesciences Holdings Corporation (US), CSL Ltd. (Australia), Hemostasis LLC. (US), Pfizer Inc. (US), Artivion Inc. (US), Zimmer Biomet (US), Kuros Biosciences AG (Switzerland), Orthofix Medical Inc. (US), Smiths & Nephew PLC (UK), Tissue Regenix (UK), Betatech Medical (Turkey), Meril Lifesciences Pvt. Ltd. (India), RTI Surgical (US), Samyang Holdings Corp. (South Korea), Aroa Biosurgery Ltd. (New Zealand), Meyer-Haake GmbH (Germany), Advanced Medical Solutions Group PLC (UK), BioCer Entwicklungs-GmbH (Germany), and Hannox International Corp. (Taiwan)

Research Coverage

This report studies the biosurgery market based on product, application, end user, and region. The report also studies factors (such as drivers, restraints, opportunities, and challenges) affecting market growth and provides details of the competitive landscape for market leaders. Furthermore, the report analyzes micro markets concerning their growth trends. It forecasts the revenue of the market segments concerning five major regions (and the respective countries in these regions).

Reasons to Buy the Report

The report will enable established and entrants/smaller firms to gauge the market's pulse, which, in turn, would help them gain a larger market share. Firms purchasing the report could use one or a combination of the below-mentioned strategies to strengthen their market presence.

This report provides insights on the following pointers:

- Analysis of key drivers (increasing volume of surgeries and growing prevalence of severe trauma injuries, strong focus on R&D leading to launch of technologically advanced products, and rising need for effective blood loss management in patients), restraints (high price of biosurgery products and rising cost of surgical procedures), opportunities (increasing use of combination materials for enhancing product efficacy, rising adoption of advanced biosurgery products in emerging markets, and growing adoption of adhesive dentistry procedures), challenges (stringent regulatory framework and requirement of skilled personnel for the effective use of biosurgery products)
- Market Penetration: Complete knowledge of the spectrum of products presented by the major companies in the biosurgery market
- Product Development/Innovation: Comprehensive understanding of the forthcoming trends, R&D initiatives, and product launches within the biosurgery market
- Market Development: Complete knowledge about profitable developing regions
- Market Diversification: Exhaustive knowledge of new goods, expanding geographies, and current changes in the biosurgery industry help to diversify the market
- Competitive Assessment: In-depth assessment of market shares, growth strategies, and product offerings of leading players such as Johnson & Johnson Services, Inc. (US), Baxter (US), Medtronic (Ireland), Becton Dickinson and Company (BD) (US), B. Braun SE (Germany), Stryker (US), Integra LifeSciences Holdings Corporation (US), CSL Ltd. (Australia), Hemostasis LLC. (US), Pfizer Inc. (US), Artivion Inc. (US), and others.

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