Clarivate™

Market insights summary

Global biosurgical agent market

What's trending and new

01. High adoption of combination ORC-based products is supporting growth in the global surgical hemostats market

- Combination and oxidized regenerated cellulose (ORC)-based surgical hemostats hold a large share of global use due to strong familiarity, wide availability, and routine use in hospital settings, with compatibility with standard surgical workflows driving high per-procedure usage and repeat purchasing.
- In addition, ease of use, cost-effectiveness, and growing physician familiarity with ORC-based hemostats are strengthening hospital preference, supporting steady demand and continued growth in the global surgical hemostat market.

02. Expanded awareness and new indications drive adhesion barrier use

- Awareness of the clinical impact of postoperative adhesions is increasing globally, leading to greater use of adhesion barriers in high-risk procedures. In parallel, approvals and use in expanded indications—especially orthopedic, spinal, and soft-tissue procedures—are increasing adoption and supporting demand growth for adhesion barriers across regions.

03. Use in orthopedics is the biggest contributor to biosurgical agent sales

- Orthopedic procedures exhibit the highest penetration of biosurgical agents, driven largely by the increasing adoption of minimally invasive surgical techniques. In 2024, orthopedics represented the largest share of total biosurgical agent unit sales, with this trend expected to continue over the forecast period.

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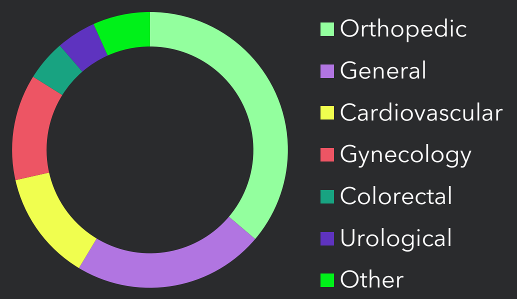
2024 global market snapshot

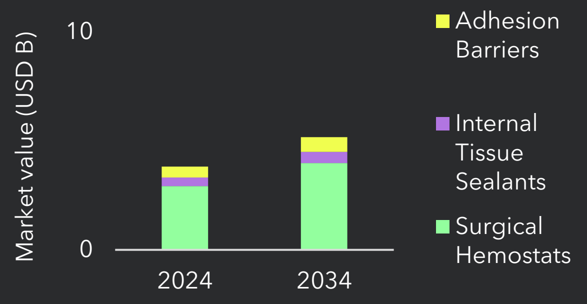
$4.4B
Market revenue

2.8%
CAGR ('19–'34)

Global biosurgical agent revenues by specialty



Global biosurgical agent market by product type



Top global biosurgical agent competitors in 2024

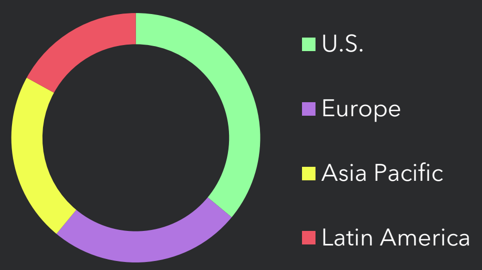
Johnson & Johnson MedTech

- The company was the leading competitor in the biosurgical agent market, owing to its broad product portfolio across multiple segments and its strong presence in the surgical hemostat segment with SURGICEL and SURGIFLO.

Baxter

- Baxter was the second-leading competitor in the biosurgical agent market, leveraging a strong presence across all segments. It holds a leading position in the gelatin-thrombin combination hemostat segment, driven by the success of its FLOSEAL and RECOTHROM products.

Global biosurgical agent revenues by region



Note: Europe coverage includes France, Germany, Italy, Spain and UK. Asia Pacific coverage includes Australia, China, India, Japan and South Korea. Latin America coverage includes Argentina, Brazil, Chile, Colombia, and Mexico.