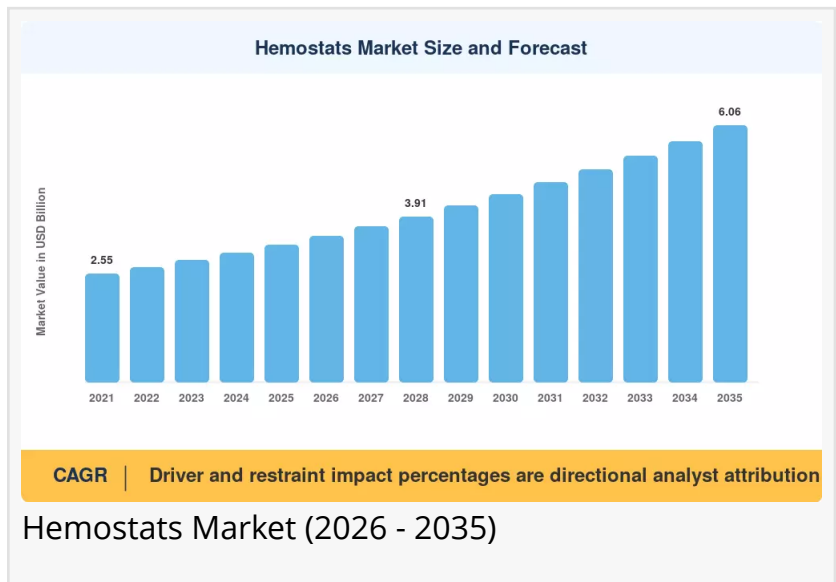


# Hemostats Market to reach USD 6.06 Billion by 2035 at 6.45% CAGR

*Hemostats Market to Surge from USD 3.24 Billion in 2025 to USD 6.06 Billion by 2035—Driven by Surgical Volume Recovery, Aging Populations and Comorbidity Burden*

NY, CA, UNITED STATES, September 9, 2026 /EINPresswire.com/ -- As per Market Research Future, the [global Hemostats Market size](#) is projected to reach USD 6.06 Billion by 2035 from USD 3.24 Billion in 2025, at a CAGR of 6.45% during the forecast period 2026–2035. The market base was estimated at USD 3.24 Billion in 2025, with the first year of the forecast period (2026) valued at USD 3.45 Billion.



The 6.45% CAGR is propelled by three converging forces: surgical volume recovery and growth, with the Australian Institute of Health and Welfare recording 771,600 public-hospital elective surgery admissions in 2023–24 and NHS England's elective recovery initiative committing GBP 8.0 billion between 2022 and 2025; aging populations and comorbidity burden, with WHO estimating 1 in 6 people worldwide will be 60 years of age or older by 2030, and anticoagulant prescriptions increasing by more than 40% in major European markets; and the shift to minimally invasive and robotic procedures, with Intuitive Surgical reporting roughly 2.68 million da Vinci procedures globally in 2024, reshaping product design specifications for laparoscopic delivery.

Global healthcare systems and surgical device leaders are amplifying this momentum. Materials science is rewriting the category from the inside, with biopolymer platforms — alginate, chitosan, and recombinant thrombin composites — engineered for faster clot initiation and predictable resorption. Combined R&D and capacity spending across the top five suppliers exceeded USD 1.1 billion in 2024, much of it aimed at flowable and powder formats that reach irregular bleeding surfaces. North America holds a 39.8% share of the Hemostats Market, anchored by high per-capita surgical intensity and premium reimbursement, while Asia-Pacific grows fastest

at an 8.9% CAGR through 2035, powered by hospital construction in China and India.

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## Key Market Trends & Growth Drivers

### Surgical Volume Recovery and Growth

This category is more directly driven by procedure counts than by price. Australia's public system recorded 771,600 elective admissions in 2023–2024 compared to 735,500 the year before, a 5% increase. NHS England's elective recovery initiative committed GBP 8.0 billion between 2022 and 2025 to increase activity above 2019 levels. Hemostatic products are used in every incremental laparotomy, arthroplasty, or bypass; tender volumes have tracked these recovery programs nearly exactly.

### Demographic Pressure and Anticoagulant Prevalence

Surgical patients who are older bleed differently. According to WHO estimates, 1 in 6 people worldwide will be 60 years of age or older by 2030. This group has disproportionately high rates of direct oral anticoagulant use; between 2019 and 2024, prescriptions for these medications increased by more than 40% in major European markets. Surgeons are forced to use more expensive flowable and combination solutions rather than passive ones because anticoagulated patients need more severe intraoperative bleeding control.

### Minimally Invasive and Robotic Adoption

Laparoscopic and robotic access changes what a hemostat has to do. Working through 8-millimetre ports rules out manual packing and favours products deliverable through narrow applicators. Intuitive Surgical reported roughly 2.68 million da Vinci procedures globally in 2024, up about 17% year over year. That trajectory is reshaping product design specifications faster than any regulatory change, and suppliers without a laparoscopic delivery system are losing formulary position.

### Ambulatory Surgical Center Migration

Cost pressure is moving cases out of inpatient theatres. The US Centers for Medicare & Medicaid Services has added hundreds of procedures to the ASC covered list since 2020, including a substantial tranche of musculoskeletal codes. ASCs buy differently—smaller pack sizes, tighter unit-cost discipline, shorter shelf-space tolerance. Suppliers that reconfigure SKUs for this channel capture volume that would otherwise default to low-cost gauze alternatives.

Ask for Customization:

## Market Segment Insights

### BY TYPE

**Absorbable Hemostats:** Dominant segment with 76.5% share in 2025 , reflecting surgeon preference for materials that need no retrieval step. Absorbable products eliminate a surgical step and a retained-object risk, with oxidized regenerated cellulose, gelatin sponges, and collagen matrices resorbing within weeks.

**Non-Absorbable Hemostats:** Fastest-growing segment at 7.0% CAGR (2026–2035) , sustained by trauma and military field-care demand. Retain a defensible niche where the material is removed anyway—external trauma dressings, military field kits, and certain dental and ENT applications.

### BY FORMULATION

**Matrix and Gel:** Largest segment at USD 1.11 Billion in 2025, driven by conformity to irregular anatomy. Combine mechanical tamponade with active clotting chemistry, commanding several times the per-unit price of a plain sponge.

**Powder:** Fastest-growing formulation, driven by diffuse oozing on parenchymal organs. Sprayable powders reach diffuse oozing across liver, spleen, and vertebral surfaces that sheets cannot conform to.

**Sheets and Pads:** Significant segment with 26.8% share in 2025 , driven by broad-surface coverage and ease of handling.

**Sponges:** Growing at 5.8% CAGR (2026–2035) , driven by low cost and established clinical familiarity.

### BY APPLICATION

**General Surgery:** Largest segment with 31.4% share in 2025 , driven by the largest absolute procedure pool.

**Cardiovascular Surgery:** Highest value-per-case segment at USD 0.73 Billion in 2025, driven by high bleeding risk and anticoagulated patients. Average hemostat spend per cardiac case runs several multiples of a general laparoscopic procedure.

**Orthopedic Surgery:** Fastest-growing application at 7.3% CAGR (2026–2035) , driven by arthroplasty volume growth and ASC migration.

Neurological Surgery: Significant segment with 13.2% share in 2025 , driven by zero-tolerance bleeding environment.

## BY END USER

Hospitals & Clinics: Largest segment with 68.4% share in 2025 , driven by complex and emergency case concentration.

Ambulatory Surgical Centers: Fastest-growing end user at 8.4% CAGR (2026–2035) , driven by payer-driven site-of-service shift. ASCs buy on unit economics with limited storage, rewarding suppliers who offer smaller pack counts and consignment terms.

Read Detailed Insights:

<https://www.marketresearchfuture.com/reports/hemostats-market-6413>

## Regional Outlook

North America — Dominant Market (~39.8% Share, 2025)

United States: Generates approximately 84.0% of North American revenue , driven by high surgical intensity and favourable device reimbursement. CMS ASC payment policy has steadily widened the list of covered surgical codes.

Canada: Contributes USD 0.12 Billion in 2025, driven by provincial elective backlog funding.

Mexico: Fastest-growing in the region at 7.6% CAGR (2026–2035) , driven by IMSS procurement modernization.

Europe — Second Largest (USD 0.89 Billion, 2025)

Germany: Holds 22.8% of regional share , driven by the highest inpatient surgical volume in the bloc.

United Kingdom: Contributes USD 0.15 Billion in 2025, driven by elective recovery programme funding.

France: Fastest-growing in the region at 6.0% CAGR (2026–2035) , driven by cardiovascular procedure growth.

Italy: Holds 11.6% of regional share , driven by regional tender consolidation.

Spain: Contributes USD 0.08 Billion in 2025, driven by public hospital modernization.

Nordic Countries: Growing at 5.9% CAGR (2026–2035) , driven by patient blood management adoption.

Russia: Holds 6.2% of regional share , driven by domestic substitution policy.

Asia-Pacific — Fastest-Growing Region (8.9% CAGR, 2026–2035)

China: Holds 31.5% of regional share , driven by hospital tier upgrading and domestic manufacturing scale. Provincial procurement alliances have driven consumable prices down by more than half in categories already tendered.

India: Fastest-growing in the region at 10.4% CAGR (2026–2035) , driven by Ayushman Bharat facility expansion. Public capital spending on hospital infrastructure continues to expand facility count, creating genuinely new demand.

Japan: Holds 19.4% of regional share , driven by elderly surgical population.

South Korea: Contributes USD 0.07 Billion in 2025, driven by robotic surgery density.

ASEAN: Growing at 9.1% CAGR (2026–2035) , driven by medical tourism infrastructure.

South America — Growing Presence (USD 0.18 Billion, 2025)

Brazil: Anchors the region with 52.4% of revenue , driven by SUS surgical capacity investment.

Argentina: Contributes USD 0.03 Billion in 2025, driven by private hospital network growth.

Middle East & Africa — Emerging Opportunity (7.1% CAGR, 2026–2035)

Saudi Arabia: Holds 27.3% of regional share , driven by Vision 2030 health sector transformation.

UAE: Contributes USD 0.03 Billion in 2025, driven by medical tourism and specialty surgery.

South Africa: Holds 21.4% of regional share , driven by private hospital group procurement.

Egypt: Fastest-growing in the region at 8.0% CAGR (2026–2035) , driven by universal health insurance rollout.

## Competitive Landscape and Recent Developments

Concentration is high, with the top five suppliers holding an estimated 61–66% of global revenue. Regional challengers in China and India compete effectively on price in commodity formats while

remaining largely absent from cardiovascular and neurosurgical tenders.

## KEY COMPANIES AND RECENT MILESTONES

Baxter International: Broadest active-agent portfolio with Floseal, Tisseel, Hemopatch, and Surgiflo. Strong cardiovascular franchise. Estimated ~16–20% revenue share.

Johnson & Johnson (Ethicon): Category-defining brand equity in oxidized cellulose with Surgicel family, Evarrest, and Evicel. Estimated ~14–18% revenue share.

Becton Dickinson: Plant-derived and microfibrillar collagen strength with Avitene and Arista AH. Estimated ~7–10% revenue share.

Integra LifeSciences: Neurosurgical and specialty collagen focus with Helitene, Instat, and Collastat. Estimated ~5–8% revenue share.

Braun Melsungen: European hospital channel depth with Gelita-Spon and Lyostypt. Estimated ~4–7% revenue share.

Teleflex: Leadership in trauma and prehospital segment with QuikClot family. Announced plans to separate into two independent public companies in February 2025. Estimated ~4–6% revenue share.

Advanced Medical Solutions Group (May 2024): Completed the acquisition of Peters Surgical for approximately EUR 105 million, adding surgical sealant and specialty suture lines. Estimated ~3–5% revenue share.

Artivion: Aortic and cardiac niche specialization with BioGlue surgical adhesive. Estimated ~3–5% revenue share.

Stryker: Bone-hemostasis and neuro-adjacent products bundled with capital equipment relationships. Estimated ~2–4% revenue share.

Pfizer (Hospital): Legacy brands with entrenched formulary presence including Gelfoam and Thrombin-JMI. Estimated ~2–4% revenue share.

## Recent Industry Developments:

European Commission (March 2023): Adopted Regulation (EU) 2023/607 extending MDR transition deadlines to December 2027 for higher-risk devices.

China National Healthcare Security Administration (2024): Expanded provincial volume-based procurement alliances into additional surgical consumable categories.

Artivion (October 2024): Disclosed and remediated a cybersecurity incident affecting corporate operations, with surgical sealant manufacturing maintained throughout.

## Future Outlook: 2026–2035

The Hemostats Market is projected to reach USD 6.06 Billion by 2035, growing at a CAGR of 6.45%, driven by surgical volume recovery, aging populations, and the shift to minimally invasive procedures.

New opportunities lie in:

**Powder and Flowable Formats for Irregular Surfaces:** Sprayable powders reach diffuse oozing across liver, spleen, and vertebral surfaces that sheets cannot conform to, capturing premium pricing in the fastest-growing access modality.

**Emerging-Market Hospital Buildout:** India's Ayushman Bharat programme has funded thousands of new secondary-care surgical facilities, with first-mover suppliers establishing clinical training relationships that persist for a decade.

**Trauma and Prehospital Care Channels:** Military and civilian emergency medical services represent a distinct buying centre with different specifications—shelf stability, extreme-temperature tolerance, single-hand application.

**Outcome-Linked Contracting and Data Services:** Suppliers able to demonstrate reduced transfusion rates and shorter operating time can structure risk-share agreements that bundle product with analytics.

**Plant-Derived and Synthetic Substitutes:** Religious, dietary, and prion-risk objections to animal-derived materials create demand for alginate, cellulose, and synthetic peptide alternatives.

**Bioengineered Materials Reach Cost Parity:** Recombinant thrombin and engineered polysaccharide matrices currently carry a cost premium over plasma-derived equivalents, but fermentation scale-up economics suggest the gap closes materially before 2032.

By 2035, the Hemostats Market is expected to demonstrate robust growth, reflecting the continued expansion of surgical volumes, technological innovation in bleeding control, and the shift toward outpatient and minimally invasive procedures.

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