

Enzymatic Wound Debridement Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The enzymatic wound debridement market is projected to grow with a CAGR of nearly 5.3% over the forecast period.

The COVID-19 outbreak impacted the enzymatic wound debridement market and the overall healthcare sector during the initial phases, as hospitals and healthcare services were reduced due to social distancing measures taken by governments worldwide. According to an article in September 2021 by the American Journal of Managed Care, during COVID-19, a large number of patients with chronic wounds delayed preventative and urgent wound care due to the lockdown. Such delays profoundly impacted the market's growth. During the pandemic, wound care was prioritized to avoid significant wound complications by reducing hospitalization and surgery. The reduction in the available wound care management services during the COVID-19 pandemic impacted the market growth. However, the sector has been recovering well since restrictions were lifted. An increase in wound care product sales, new product launches, and increasing demand for a faster cure for chronic wounds leading the market recovery over the last two years.

The major factors attributing to the growth of the market include the increase in the incidence of chronic diseases such as diabetes, cancer, and other autoimmune diseases. For instance, according to the IDF Diabetes Atlas 10th edition 2021, an estimated 537 million adults live with diabetes worldwide. This number is predicted to rise to 643 million by 2030 and 783 million by 2045. The risk of foot ulcers increases with uncontrolled diabetes. The rising cases of diabetic people indicate a higher risk for the rising number of chronic wounds such as diabetic foot ulcers, which is augmenting the growth of the market studied. Moreover, as per Mission Regional Medical Center 2022 update, it is estimated that 6.7 million people currently live with chronic wounds, and that number is expected to grow by more than 2% for the next decade. Chronic wounds cost the healthcare system more than USD 50 billion each year. In the United States, more than 29 million people (9.5% of the population) have diabetes, and nearly two million of those people are likely to develop a diabetic foot ulcer or another non-healing wound each year. Hence

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considering the advantages of enzymatic wound debridement, the market is anticipated to witness growth over the forecast period.

Furthermore, product launches, mergers, and acquisitions in the field of enzymatic wound debridement are anticipated to boost market growth over the forecast period. For instance, in August 2022, 3M Health Care's Medical Solutions Division introduced a new 3M Veraflo Cleanse Choice Complete Dressing Kit and a software upgrade for the 3M V.A.C. These new products assisted the doctors employing Veraflo Therapy (negative pressure wound therapy with instillation) in simplifying care delivery processes and making wound dressing changes easier, faster, and less stressful for their patients when compared to previous Veraflo Therapy dressings.

Hence, due to the increase in the incidence of chronic diseases like diabetes, the rise in the number of accidents, and technological advancements in enzymatic wound debridement products, the enzymatic wound debridement market is anticipated to witness growth over the forecast period. However, stringent regulatory policies are likely to restrain the market growth over the forecast period.

Enzymatic Wound Debridement Market Trends

Collagenase-Based Enzymatic Wound Debridement Products are Expected to Witness Rapid Growth in the Market Over the Forecast Period

Collagenase-based enzymatic wound debridement products are predominantly used for healing surgical wounds. Most surgical wounds after cancer surgery are relatively large and deep, which generates exudate that needs regular supervision. Thus, the proper use of these products helps handle large wounds, which substantially reduces the risk of infection. Therefore, the rising incidence of chronic diseases is anticipated to increase the demand for enzymatic wound debridement products, thereby propelling market growth over the forecast period. According to the study titled published in Diabetes Research and Clinical Practice in February 2021, in Germany, the cumulative diabetic foot ulcer recurrence rate was around 70% over a 15-year period, and patients who have had an ulcer before are more likely to experience another one in the future. Thus, an increased recurrence rate of DFU is expected to boost segment growth over the forecast period.

Moreover, several studies have focused on the use of collagenase-based enzymatic wound debridement products in chronic wound healing. For instance, an article titled published in January 2022 by PubMed indicated that the combined action of hyaluronic acid and collagenase ointment demonstrated a reduction in healing time while improving healing quality, with a decrease in pain. Such studies are expected to boost market growth over the forecast period. Furthermore, an increasing number of accidents, such as road accidents, burns, and trauma, across the world is also projected to propel growth. For instance, as per the French Road Safety Observatory 2022 update, the number of injury accidents recorded by police forces was 3,728 in January 2022, higher than last year's result (3,508 accidents). Further, as per the Government of UK 2021 update, 11,194 cases were reported for shallow cuts, lacerations/abrasions in the road casualties that occurred in 2021. As per the same source, 524 cases of severe head injury, 968 cases of deep cuts/lacerations, and 276 cases of severe chest injury were reported. As accidents and injuries are increased the chance of using collagenase-based enzymatic wound debridement products is also raised which is likely to boost the market growth.

Hence, due to the rise in chronic wounds, the number of accidents, and technological advancements in the products, the collagenase-based enzymatic wound debridement product segment is likely to witness growth in the market over the forecast period.

North America is Expected to Grow the Enzymatic Wound Debridement Market Over the Forecast Period

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North America is expected to witness growth in the overall market, throughout the forecast period owing to the factors such as the presence of key players, the high prevalence of chronic diseases and accidents in the region, and the established healthcare infrastructure. For instance, according to the IDF Diabetes Atlas Tenth edition, in 2021, around 32.2 million people in the United States had diabetes, projected to grow to 36.3 million by 2045. The rising number of diabetic cases is expected to increase the number of diabetic ulcer cases and contribute to market growth in the studied region.

Furthermore, as per the data published by BLS in 2021, private industry employers reported 2.6 million nonfatal workplace injuries and illnesses in 2021. Hence, as the number of injury cases increases the demand for enzymatic wound debridement products increases, thereby boosting the market growth over the forecast period. Moreover, product launches, conferences regarding the clinical outcome, acquisitions, and collaborations in the field of enzymatic wound debridement market are likely to boost the market growth over the forecast period. For instance, in April 2022, MediWound Ltd. presented a poster and oral presentation of its EscharEx clinical data at the 35th Symposium on Advanced Wound Care (SAWC) Spring Conference. EscharEx is an innovative enzymatic solution for the debridement of hard-to-heal wounds.

As a result of the increase in chronic wounds, the number of accidents, and technological advances in the products, the enzymatic wound debridement market in North America is expected to grow over the forecast period.

Enzymatic Wound Debridement Market Competitor Analysis

The enzymatic wound debridement market is moderately competitive and consists of several major players. Some of the companies which are currently present in the market are B. Braun Melsungen AG, ConvaTec Inc., Smith & Nephew, Integra LifeSciences Corporation, and Molnlycke Health Care AB among others.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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