

Markets for Advanced Wound Management Technologies

Market Research Report | 2023-06-09 | 248 pages | BCC Research

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Report description:

Description

Report Scope:

This report aims to provide a comprehensive study of the global market for AWM products and technologies. It describes the different types of AWM products (advanced nonbiological wound dressings, wound biologics/bioactives, external wound healing devices, anti-adhesion products and other advanced consumable technologies and wound closure sealants and glues) and their current and historical market revenues. Advanced nonbiological wound dressings are categorized in foam, hydrogel, film, alginate and gelling fiber, hydrocolloid, superabsorbent, contact layer, and other advanced nonbiological wound dressings. Wound biologics/bioactives are divided into cellular and tissue-based products (CTPs)/skin substitutes and other biologic therapies. External wound healing devices are segmented into negative pressure wound therapy systems, oxygen therapy devices and other external wound healing devices. The market for anti-adhesion products and other advanced consumable technologies is divided into anti-adhesion products and advanced debriding and cleansing agents.

This report also studies applications for advanced wound management products: acute wounds and chronic wounds. The AWM market for acute wounds includes surgical and traumatic wounds and burns. The AWM market for chronic wounds includes diabetic foot ulcers, pressure ulcers, and venous leg and other ulcers. An in-depth analysis of the global AWM market includes historical data and market projection on sales by product type, application, end user, region, and country-specific market segmentation.

For a more in-depth understanding of the market, the report provides profiles of the competitive landscape, key competitors and their respective market shares. However, this report does not cover support/complementary products that are used to enhance wound healing outcomes, such as compression systems, skin protectants, cover dressings, tapes and wound assessment tools.

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Report Includes:

- 169 data tables and 75 additional tables
- An up-to-date review and analysis of the global market for advanced wound management (AWM) products and technologies
- Analyses of the global market trends, with historical market revenue data (sales figures) for 2020 and 2021, estimates for 2022, forecasts for 2023, and projections of compound annual growth rates (CAGRs) through 2028
- Discussion of industry growth driving factors and major technology issues and challenges affecting the global market for AWM technologies as a basis for projecting demand in the next few years (2023-2028)
- Estimation of the actual market size and revenue forecast for the global advanced wound management market in USD million values, and corresponding market share analysis based on product type, application, end user, and region
- Analysis of the market opportunities and future prospects with relate to advanced wound management, applications and business considerations of AWM products and technologies with emphasis on the relevant market forces and macroeconomic factors
- Review of selected new AWM products in development and emerging technologies, clinical trial applications, and potential markets for future developments
- Insight into the recent industry structure, competitive aspects of each product segment, increasing investment on R&D activities, market development strategies, and company value share analysis
- Identification of major stakeholders and analysis of the company competitive landscape based on their recent developments, financial performance, segmental revenues, and operational integration
- Company profiles of major players within the industry, including 3M, AbbVie Inc., B. Braun Melsungen AG, Cardinal Health, and Smith & Nephew Plc

Executive Summary

Summary:

It is estimated that nearly REDACTED million people suffer from hard-to-heal wounds globally, including nearly REDACTED million people in the U.S in 2021. The global prevalence of chronic wounds is estimated at REDACTED to REDACTED per REDACTED population, and the incidence is expected to rise with ageing populations worldwide in 2022.

Wound treatment is complex and varies across a broad continuum of care. Non-healing wounds significantly deteriorate the patients' quality of life and can cause serious medical events such as limb amputations or premature death. There are two types of wound management technologies: traditional and advanced. A significant percentage of hard-to-heal wounds often requires solutions such as advanced dressings, wound bioactives/biologics and other advanced wound care products. Advanced wound management (AWM) products provide optimal conditions for the natural reparative processes of the wound. These products are favorable to healthcare providers and patients alike, as they promise

shorter treatment times and higher cost savings. AWM products are used for the treatment of acute wounds, caused by burns, trauma and surgery; chronic wounds, including diabetic foot ulcers and venous leg ulcers; and prevention of pressure ulcers.

AWM is a significant and growing market. The incidence, chronicity and complexity of wounds is strongly influenced by age and lifestyle factors, including smoking, weight, alcohol consumption, a lack of exercise and unhealthy diet. Demographic health trends such as an aging population, and the sharp rise in the incidence of diabetes, obesity and other chronic diseases, are resulting in the increased prevalence of systemic comorbidities, leading to growing prevalence of hard-to-heal wounds. Moreover, a large middle class accessing higher levels of care, and increasing understanding of the economic benefits of using AWM products early in the wound-healing process, are also fueling the growth of the market.

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Due to the huge costs associated with delayed wound healing, a growing number of patients worldwide are receiving advanced treatment of wounds. The adoption of AWM products is expected to continue growing at a rapid rate due to increasing awareness of clinical and economic benefits of using these products among healthcare professionals as well as the growing number of patients demanding more effective treatment solutions. However, the high cost of AWM products, inadequate reimbursement and pricing pressures are the key restraining factors in the market.

The competition in the AWM market is intense, and the market is witnessing rapid advances in technologies and an increasing emphasis on intellectual property.

The global market for AWM products was worth \$REDACTED billion in 2022. The market is expected to increase to \$REDACTED billion by 2028 at a CAGR of REDACTED% during the forecast period of 2023 till 2027.

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Asia-Pacific
China
Japan

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Rest of Asia-Pacific
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3M

ABBVIE INC.

ADVANCED MEDICAL SOLUTIONS GROUP PLC

BIOTISSUE INC.

B. BRAUN MELSUNGEN AG

CARDINAL HEALTH

COLOPLAST A/S

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MOLNLYCKE HEALTH CARE AB.
ORGANOGENESIS HOLDINGS INC.
PAUL HARTMANN AG
SMITH & NEPHEW PLC
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