

Italy Wound Care Management - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Italy Wound Care Management Market size is estimated at USD 561.27 million in 2024, and is expected to reach USD 718.39 million by 2029, growing at a CAGR of 5.06% during the forecast period (2024-2029).

The impact of COVID-19 on the studied market was adverse in the initial phase of the pandemic, owing to the cancellations of elective procedures, including treatment and diagnosis of chronic wounds. However, the market gained traction as elective procedures resumed in the country. Meanwhile, research on wound care and management increased in Italy during the pandemic.

The implementation of telemedicine in wound management also played an important role in the treatment of wounds, ulcers, and other facets of wound management. For instance, according to a study published in February 2021, through the implementation of telemedicine, patients with diabetes who had foot ulcers were able to receive care at home. Various non-critical situations were managed outside of hospitals and clinics by offering patients with care and guidance at home through visiting nurses and doctors, as well as telemedicine. Such initiatives led to a rise in the adoption of telemedicine services for wound management during the pandemic, and the trend continued even after the lockdowns were lifted and the situation stabilized. This is likely to drive the market growth during the forecast period.

Factors such as the increasing incidence of chronic wounds, ulcers, diabetic ulcers, etc., and the rising burden of the geriatric population are fueling the market growth. An increasing geriatric population contributes toward disease burdens. According to the Overpopulation Project, with almost a quarter of its population aged 65 years and above, Italy has become one of the countries with the largest elderly population.

The amount of time it takes for a wound to heal varies greatly due to many reasons. Multiple comorbidities and risk factors that

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increase wound chronicity are common among older adults. Some of these comorbidities include diabetes mellitus, cardiovascular diseases, inadequate nutrition, decreased mobility, and declining cognitive functions. Therefore, the prevalence of wounds among the elderly in Italy is expected to create opportunities for wound care and management, thereby driving the market growth over the forecast period.

Furthermore, according to the IDF, the number of people suffering from diabetes in Italy in 2021 was 4,470.3 thousand and the number is expected to reach 4,699.1 thousand in 2030. Such an expected rise in the diabetic population, who are more prone to diabetic foot ulcers, is likely to drive market growth.

Technological advancements in products, research studies by scientists, and strategic initiatives by market players are projected to boost the market growth. For instance, in October 2021, scientists at the University of Bologna in Italy developed smart bandages that are equipped with sensors and can record the status of wounds. The smart bandage is capable of reading moisture levels, which is then transferred to a dedicated application on a smartphone.

Therefore, the wound care management market in Italy is expanding with the increase in research and the availability of new technologies, and is anticipated to witness growth over the forecast period. However, reimbursement issues for advanced wound care products are expected to restrain the growth of the market.

Italy Wound Care Management Market Trends

Pressure Ulcer Segment is Expected to Witness a Major Share Over the Forecast Period

Pressure ulcers are wounds on the skin and on underlying tissue that are primarily caused due to persistent pressure on the skin. Although they can affect anyone, they typically afflict those who are bedridden or spend a lot of time in a chair or wheelchair. Also, older adults (70 years and above) and obese people are most likely to get affected by pressure ulcers.

Factors such as the growing burden of the geriatric population, the increasing burden of chronic diseases, and serious injuries requiring long-term bed rest are expected to drive the growth of the pressure ulcer segment of the Italian wound care management market over the forecast period.

The growing burden of the geriatric population in the country is expected to contribute to the market segment's growth. For instance, according to the Eurostat database updated in June 2022, nearly 23.5% of the Italian population in 2021 were aged 65 years and above. The database also reported that in 2021, 7.6% of the Italian population was aged 80 years and above. Since older adults commonly have lower mobility and spend a lot of time sitting and resting, they are at an increased risk of pressure ulcers. With such a high geriatric population in the country, the target population for pressure ulcer care products is expected to increase and this may contribute to the growth of the segment.

Wound Care Devices Segment is Expected to Hold a Fastest Growth Rate Over the Forecast Period.

Wound care devices include therapy devices based on negative pressure therapy, pressure relief devices, compression therapy, and hyperbaric oxygen equipment, among others. Factors such as the growing burden of targeted diseases and increasing research studies in the area of wound care devices are propelling the growth of the market segment over the forecast period.

The article titled 'Economic Impact of the Use of Photodynamic Therapy with RLP068 (Based) System' published in February 2021, reported that the use of photodynamic therapy with RLP068 (based) system could be an effective way to manage diabetes foot ulcers and could offer the chance to improve care for DFI patients without compromising the sustainability of the system.

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The approval of products by the centralized regulatory authority is also propelling the growth of the market segment. For instance, in April 2021, Biocomposites received European CE mark's approval to use STIMULAN in infected bone and soft tissue. The STIMULAN Rapid Cure device and STIMULAN Kit can carry an antibiotic directly into the bone and soft tissues. Thus, owing to the abovementioned factors the wound care devices segment is expected to project significant growth over the forecast period.

Italy Wound Care Management Industry Overview

The Italian wound care management market is fragmented in nature due to the presence of many companies operating globally as well as regionally. The competitive landscape includes an analysis of a few international as well as local companies that hold market shares and are well known. Some key players are 3M, B. Braun SE, Coloplast Group, ConvaTec Inc, Integra LifeSciences, Molnlycke Health Care AB, Medtronic, Smith + Nephew, and Paul Hartmann AG, among others.

Additional Benefits:

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

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