

Pressure Ulcers Treatment - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Pressure Ulcers Treatment Market size is estimated at USD 5.65 billion in 2024, and is expected to reach USD 7.47 billion by 2029, growing at a CAGR of 5.75% during the forecast period (2024-2029).

At the beginning of 2020, the outbreak of COVID-19 worldwide impacted the market studied, as wound care services, such as pressure ulcer treatments, were put on hold to prevent the spread of the COVID-19 virus. This situation put tremendous pressure on hospitals and other healthcare centers to provide services to COVID-19 patients. According to the January 2021 research article titled 'Pressure Injury Prevention in COVID-19 Patients With Acute Respiratory Distress Syndrome,' it was found that most of the COVID-19 infected people may have mild symptoms, while older people and people with chronic illnesses may develop acute respiratory distress syndrome (ARDS). Patients with ARDS with worsening hypoxemia require prone positioning to improve the respiratory mechanics and oxygenation. Intubated patients may stay in a prone position for up to 12-16 hours, increasing the risk of pressure injury (PI). Thus, the increasing incidence of pressure ulcers among COVID-19 patients is driving the demand for pressure ulcers treatments. Moreover, in November 2020, a collaborative effort between orebro University, orebro University Hospital and Ghent University issued new global guidelines for preventing pressure ulcers and other complications in patients receiving respiratory support. Though, the market experienced a significant decline during the initial days of the pandemic, later on, the increased incidence of pressure ulcers among COVID-19 patients created a huge demand for pressure ulcers treatment.

Pressure ulcers also are known as bedsores or pressure sores, are injuries caused to skin and tissues primarily caused by prolonged pressure on the skin. Pressure ulcers can range in severity from patches of discolored skin to open wounds that expose the underlying bone or muscle. The geriatric population is more prone to the development of pressure ulcers that are also known as bedsores. The number of people aged 60 years and above has been substantially increasing in recent years in most of the regions, and it is expected to keep growing over the coming years. For instance, according to the Centers for Disease Control and

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Prevention (CDC) in August 2020, around one in 10 seniors with limited mobility developed bedsores. This factor will be contributing to the market growth. Additionally, as per the data published by the United States Department of Health and Human Services in 2020, around 2.5 million people in the United States were affected by pressure ulcers every year. Moreover, the treatments for these ulcers cost more than around USD 9.1-11.6 billion every year in the United States. These alarming expenses are contributing to the rising demand for bed sore management treatment.

Also, the increasing concentration of major players in the market and the active investments of these companies in the research and development activities for the innovation of novel wound care products act as major driving factors for the market. For instance, in January 2020, the company ConvaTec Group PLC announced the launch of ConvaMax, which is the new superabsorber wound dressing extensively used in the management of highly exuding wounds, including leg ulcers, pressure ulcers, diabetic foot ulcers, and dehiscent surgical wounds. Additionally, in November 2021, the company Sanara MedTech Inc. announced the commercial launch of two new innovative extracellular matrix products (FORTIFY TRGTM Tissue Repair Graft & FORTIFY FLOWABLETM Extracellular Matrix) in partnership with Cook Biotech Inc. Thus, the introduction of such technologically advanced devices will increase the demand for wound care products.

Therefore, the technological advancements in wound care therapy and an increase in the geriatric population are the key driving factors in the pressure ulcer treatment market.

Pressure Ulcers Treatment Market Trends

Foam Dressing is Expected to Hold a Major Market Share in the Pressure Ulcers Treatment Market

Foam dressings are semipermeable polyurethane material used in wound care. Foam dressings are adhesive and non-adhesive dressings and they can be used for a skin graft, surgical and infected wounds, burns, abrasions, lacerations, draining peristomal wounds, and leg ulcers.

Foam dressings are considered an effective tool for moist wound healing and are specifically useful in preventing dressing-related trauma, managing exuding wounds, and reducing discomfort and pain. The foam dressings are made from semi-permeable polyurethane, so they are non-adherent and non-linting, making them more suitable for bleeding wounds. This dressing allows water vapor to enter but keeps out bacteria and other contaminants. The outer layer of foam dressing is generally made waterproof or hydrophobic.

The technological advancements in foam dressing fuel the segment's growth. For instance, according to the article published in the Mathematical Problems in Engineering in April 2021, titled 'IOT Medical Device-Assisted Foam Dressing in the Prevention of Pressure Sore during Operation,' foam dressings can minimize the prevalence of pressure sores and the likelihood of pressure ulcers by up to 30%. When compared to an unused pressure sore, the Internet of Things (IoT) can improve the efficacy of foam dressings and lower the likelihood of pressure sore by roughly 7%. Thus, the efficiency of foam dressing in the treatment of pressure ulcers is expected to rise the demand for it. The availability and accessibility of the advanced foam dressing are expected to boost the segment.

Foam dressings are extensively used for treating pressure ulcers, which is likely to drive the market. As per the February 2020 research article published in the Journal of Wound Care, it was demonstrated that the foam dressing intervention is likely to be a cost-effective strategy compared with standard prevention alone for the treatment of hospital-acquired pressure ulcers (PU). Additionally, according to an October 2020 clinical study titled 'Effects of Multilayer Silicone Foam Dressings for the Prevention of Pressure Ulcers in High-Risk Patients: A Randomized Clinical Trial', it was reported that multilayer silicone foam dressings can prevent pressure ulcers of the sacrum and coccyx in patients with persistent severe diarrhea and/or fragile skin.

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Moreover, market players are frequently launching new foam dressing, which is further driving the market growth. In November 2020, Advanced Medical Solutions (AMS), a surgical and advanced wound care specialist company, received CE mark approval and USFDA approval for its Silicone PHMB Foam Dressing to treat various wounds such as pressure ulcers and diabetic foot ulcers, among others.

Thus, owing to the increased usage of foam dressings along with the frequent product launches, the market is expected to grow significantly during the forecast period.

North America is Expected to Hold a Significant Share in the Market and Expected to do Same in the Forecast Period

North America is expected to hold a major market share in the global pressure ulcer treatment market due to the rising geriatric population, increasing the number of cases of pressure ulcers among the geriatric population, and surge in demand for dressings, devices, and sealants in this region. Moreover, the rise in the adoption of advanced technologies in wound care therapy and the presence of well-established healthcare facilities is fueling the growth of the overall regional market to a large extent.

According to the World Ageing 2019 report, in 2019, there were about 53.340 million (16.2%) in the population aged 65 years or over in the United States. This number is projected to reach 70.842 million (20.3%) in 2030. Furthermore, people over 65 are particularly vulnerable to pressure ulcers due to factors such as reduced aging of the skin, blood supply, and a higher rate of mobility problems.

According to the study 'Prevalence, incidence, length of stay and cost of healthcare-acquired pressure ulcers in pediatric populations: A systematic review and meta-analysis' published in March 2021, the overall prevalence of pressure ulcers ranged from 0.47% to 31.2%. The study also suggests that hospital-acquired pressure ulcers frequently occur in pediatric populations with a great variation across different age groups. Thus, the high incidences of pressure ulcers will drive the demand for its therapeutics, thus driving the market. Moreover, according to Joint Commission Center for Transforming Healthcare 2020, every year, an estimated 2.5 million patients in the US acute-care facilities suffer from pressure ulcers, and around 60,000 die from their complications. Pressure ulcers have been recognized as a public health issue in the United States that contributes greatly to national health care expenditures.

The pressure ulcer treatment market in North America is projected to expand at a significant CAGR during the forecast period due to technological advancements and developing health care infrastructure.

Pressure Ulcers Treatment Industry Overview

The pressure ulcers treatment market is fragmented competitive and consists of several major players. In terms of market share, a few of the major players are currently dominating the market. Some of the market players are Smith & Nephew PLC, Integra Life Sciences, Hill-Rom Holdings Inc., Molnlycke Health Care AB, Cardinal Health, Essity Aktiebolag, 3M Company, B. Braun Melsungen AG, Acelity LP Inc., and Coloplast Group.

Additional Benefits:

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

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