

Wound Debridement - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Wound Debridement Market size is estimated at USD 4.95 billion in 2024, and is expected to reach USD 6.61 billion by 2029, growing at a CAGR of 5.97% during the forecast period (2024-2029).

This COVID-19 pandemic adversely affected the market worldwide due to the cancellation of many treatment procedures, including surgeries. For instance, according to the 2021 annual report published by Convatec, the advanced wound care segment, which included debridement products, declined revenue of 4.0% or 3.8% on a constant currency basis principally driven by the negative COVID-19 impact of reduced elective surgeries and restricted access to the healthcare setting. However, as per the same source mentioned above, the studied market is expected to witness substantial growth over the forecast period due to the return of elective operations in the post-pandemic period.

The major growth factor for the wound debridement market is the incidence of diabetes and associated wounds, as diabetic people are at higher risk of developing wounds requiring debridement. Thus, an increase in the diabetic population is expected to significantly impact the market. For instance, according to the report published by the Indiana University School of Medicine in November 2022, diabetes-related skin injuries, known as diabetic wounds, are particularly challenging to treat and frequently result in amputations or other consequences due to infections. Thus, wound debridement removes nonviable tissue, facilitates wound healing, and helps prevent these serious outcomes. So, the increasing prevalence of diabetes worldwide is expected to be a significant growth driver for the studied market.

Moreover, with the increase in the diabetic population, wound incidence is expected to increase, leading to an increase in the demand for wound debridement, which is expected to grow over the forecast period. For instance, according to the report published by the International Diabetes Federation (IDF) in November 2021, about 537 million adults in the age group 20-79 years

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are living with diabetes in 2021 globally, and this number is projected to increase to 643 million by 2030, and 783 million by 2045. Further, as per the same source, about 541 million adults were at risk of developing type-2 diabetes. This shows the increasing burden of diabetes, which increases the risk of wounds that may propel the market growth over the forecast period.

However, the high treatment cost associated with wound debridement of different types of wounds is expected to impede the study market over the forecast period.

Wound Debridement Market Trends

Gels in Product Segment is Expected to Have a Significant Share in the Market Over the Forecast Period

The gels segment is expected to have a significant share in the market as a product because it maintains a moist wound environment and has certain benefits as compared to other products, such as no inflammation, less bleeding, filling the dead space, and removal of necrotic tissues safely, without causing infection. In addition, gels are easily available and easy to use, which is why they are preferred by most of the population, especially the geriatric population, which is expected to boost the growth of the wound debridement market.

The increasing research funding for wound healing in developing countries like the United States and new product developments in the segment increase the widespread applications of products and the usage of these products, which is expected to boost market growth. For instance, as per the study report published by Wounds UK in March 2023, ChloroSolv Wound Debridement Gel showed much higher activity in more difficult in vitro biofilm testing as compared to other debridement methods/products, which increases the usage of this product due to higher activity of debridement and is expected to boost the market over the forecast period.

In addition, with the growing demand for effective wound debridement solutions, the companies are improving their offering with the launch of more advanced, and effective products. This is further expected to augment the segment growth. For instance, as per the NHS Trust in October 2022, the NHS Supply Chain launched an innovative gel that facilitated the removal of damaged tissue using chemical debridement as an alternative to sharp debridement. The product is cost-effective as compared to the standard care alone and provide additional benefits to the patient's quality of life, which is expected to have significant growth in the market over the forecast period.

Therefore, due to the abovementioned factors, the gels segment is expected to have a significant share in the wound debridement market during the forecast period.

North America is Expected to Occupy a Significant Share in the Market Over the Forecast Period

North American region is expected to hold a significant share in the wound debridement market owing to the increasing prevalence and incidence of diabetes and diabetic foot ulcers, a high number of surgeries owing to chronic diseases, and a growing aging population.

In the North American region, the United States is expected to have a major share in the wound debridement market due to factors such as the high incidence of wounds due to various reasons like infections, the growing geriatric population, and an increasing number of surgeries. For instance, as per the American Podiatric Medical Association factsheet released in September 2021, 75% of Americans at some point in their lives encounter foot health issues of varied severity, with an annual average of 1.4-foot issues affecting about 19% of United States citizens. It also reported that about 5% of the United States population has foot infections such as athlete's foot, other fungal infections, and warts each year. Hence, there is an increasing need for debridement for the high burden of foot infections, which is expected to boost the market growth in the region.

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Furthermore, the increasing strategies of market players like acquisitions and product agreements increase the widespread distribution of wound debridement services and likely propel the market growth. For instance, in December 2021, Essity Aktiebolag acquired a company based in the United States called Hydrofera, which offers technology and products within advanced wound care, including debridement products.

Similarly, in November 2022, Sanara MedTech Inc. and InfuSystem Holdings, Inc. established a partnership, SI Wound Care, LLC, which focused on delivering a complete wound care solution targeted at improving patient outcomes, lowering the cost of care, and increasing patient and provider satisfaction. The partnership is expected to enable InfuSystem to offer new customers to Sanara's advanced wound care product line, including necrotic tissue debridement and associated services.

Therefore, owing to the abovementioned factors, the North American region is expected to occupy a significant market share during the study's forecast period.

Wound Debridement Industry Overview

The wound debridement market is competitive, with many global players operating and offering innovative products in the studied market. The market is expected to become more competitive with the business expansion strategies employed by the companies to gain more market share, such as product launches, mergers and acquisitions, collaborations, and other activities. Some of the key players in the market are B. Braun SE, Smith+Nephew, Lohmann & Rauscher, Histologics, LLC, and Medaxis, among others.

Additional Benefits:

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

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