

## **Wound Care Market Report and Forecast 2025-2034**

Market Report | 2025-06-20 | 400 pages | EMR Inc.

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### **Report description:**

The wound care market was valued at USD 24.26 Billion in 2024, driven by the increasing prevalence of chronic wounds across the globe. The market is anticipated to grow at a CAGR of 5.20% during the forecast period of 2025-2034 to achieve a value of USD 40.28 Billion by 2034.

#### Market Dynamics

#### Market Driver

##### Rising Cases of Chronic and Acute Wounds Driving Demand for Advanced Therapies

The rising prevalence of chronic and acute wounds, driven by aging populations, diabetes, and lifestyle diseases, is increasing the demand for advanced wound care solutions. Globally, chronic wounds affect approximately 1.51 to 2.21 per 1,000 people. According to the Institute for Health Metrics and Evaluation, over 500 million people currently live with diabetes, a number projected to reach 1.3 billion within the next 30 years.

Advancements in wound care technology have led to the development of innovative antimicrobial dressings that enhance healing and pain management. For instance, in November 2024, the FDA granted 510(k) clearance to Imbed Biosciences for Microlyte Ag/Lidocaine, an antimicrobial wound dressing incorporating lidocaine to manage painful skin wounds. This innovation addressed a critical market need by providing pain relief while suppressing 99.99% of microbial growth and promoting cellular regeneration. Designed for ulcers, burns, surgical wounds, and abrasions, the dressing contains 40 mg of lidocaine per 100 cm<sup>2</sup> to enhance patient comfort. As cases of chronic wounds continue to rise due to diabetes, pressure ulcers, and surgical procedures, demand for effective, pain-relieving solutions has surged. Imbed Biosciences plans to officially launch the product at the Symposium for Advanced Wound Care in May 2025.

#### Market Restraints

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## High Costs and Lengthy Recovery Times Limiting Wound Care Accessibility

Despite technological advancements, the wound care industry faces challenges due to the high costs of treatment. Advanced wound care products, including bioengineered dressings and negative pressure therapy, are expensive, limiting their adoption in low-income regions. Many healthcare systems struggle with affordability and reimbursement complexities, making it difficult for patients to access these treatments. Additionally, traditional wound management remains prevalent in cost-sensitive markets, slowing the shift toward modern, innovative therapies.

Extended recovery periods for chronic wounds further impact market expansion. Patients with diabetic ulcers, pressure injuries, and post-surgical wounds require prolonged treatment, increasing healthcare expenditure. Limited awareness, especially in developing regions, delays timely intervention, exacerbating wound severity. While reimbursement policies in developed markets are improving access, disparities in coverage persist. Addressing these barriers through cost-effective innovations and expanded reimbursement frameworks is essential to drive wider adoption of wound care solutions.

## Market Opportunities

### Regulatory Approvals and Strong Product Pipeline Driving Market Expansion

The wound care market is experiencing significant growth due to continuous innovation and regulatory support. Market players are focusing on developing advanced wound care products that offer enhanced healing and infection prevention. Regulatory authorities, such as the US FDA, are accelerating approvals for novel solutions, enabling faster adoption in clinical and retail settings. The availability of cost-effective and efficient products is expected to strengthen market growth, particularly in developed economies where demand for superior wound management solutions is increasing. Expanding product portfolios and investments in research and development are further shaping the industry's future.

For instance, in April 2024, Vomarix launched PowerHeal, a bioelectric bandage approved by the FDA for over-the-counter (OTC) wound management. The product, available in multiple sizes, is designed for minor cuts, scrapes, irritations, abrasions, and blisters. Its FDA approval, backed by positive randomised controlled trials (RCTs), enhances its credibility, supporting wider adoption in retail and clinical settings.

Such innovations highlight the market's strong pipeline, with emerging technologies improving wound care accessibility. Future advancements, including bioengineered dressings and AI-powered wound monitoring systems, are expected to further fuel market expansion.

## Market Challenges

### Limited Accessibility in Low-Income Regions Restricting Market Growth

Despite significant advancements, accessibility to wound care products remains a challenge in low-income regions. The high cost of advanced wound care products limits their availability, leading to reliance on traditional treatments. Many healthcare facilities in underdeveloped areas lack the infrastructure and funding required to adopt modern therapies, resulting in delayed treatment for chronic wounds. Government funding and non-profit initiatives are essential to bridge this gap and expand accessibility to cost-effective solutions.

A lack of awareness about wound care further restricts market penetration. Many patients in low-income regions do not seek timely medical intervention, worsening wound conditions. Insufficient healthcare training also limits proper wound management,

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increasing the risk of complications such as infections and amputations. Educational initiatives targeting healthcare professionals and patients can help mitigate these challenges.

Despite efforts to enhance affordability, inconsistent reimbursement policies still hinder access to advanced therapies. Bridging these gaps is essential for sustained market growth, ensuring equitable treatment availability and supporting innovation in healthcare solutions for a more accessible and effective medical landscape.

#### Shortage of Skilled Professionals and Regulatory Barriers Impacting Industry Expansion

The wound care market faces challenges due to a shortage of skilled professionals trained in advanced wound management. Many developing regions lack specialists, resulting in suboptimal patient care. Continuous medical education is essential for better treatment outcomes. Additionally, strict regulations and delayed approvals hinder market entry. Streamlining regulatory pathways can enhance access to innovative solutions, support industry growth and enable smaller companies to compete effectively.

#### Global Wound Care Market Trends

Several trends and developments are being observed in the market to enhance the current situation. Some of the noteworthy trends are as follows:

##### Growing Adoption of Bioactive Therapies for Advanced Wound Healing

The rising prevalence of chronic wounds has significantly increased the demand for bioactive therapies and regenerative wound care products. Innovations such as bioengineered dressings, growth factors, and stem cell-based solutions are transforming wound care, especially for late-stage wounds that are challenging to treat. These advanced therapies promote tissue regeneration, reduce infection risks, and enhance healing outcomes. As a result, healthcare providers are incorporating bioactive wound care products into treatment protocols more frequently. This growing adoption is driving market expansion, positioning bioactive solutions as a crucial component of modern wound management strategies.

The increasing demand for bioactive therapies is driving innovation in advanced wound healing. For instance, in January 2025, Fesarius Therapeutics Inc. received 510(k) clearance from the FDA for its DermiSphere hydrogel Dermal Regeneration Template (DermiSphere hDRT), a novel collagen-based dermal matrix. This breakthrough product enhances tissue integration, revascularization, and wound healing, marking a significant advancement in regenerative medicine and reconstructive surgery. As healthcare providers seek effective, minimally invasive wound care solutions, the adoption of bioactive therapies continues to rise. These innovations accelerate healing, reduce complications, and improve patient outcomes. The regulatory approval of such products highlights the growing shift towards biologically active wound dressings and regenerative therapies, shaping the future of the advanced wound care market.

#### IMPACT OF COVID-19

The COVID-19 pandemic disrupted healthcare systems worldwide, delaying elective procedures and non-urgent treatments, including wound care. Many hospitals prioritised critical care, leading to reduced patient visits for chronic wounds and post-surgical wound management. This resulted in a temporary decline in demand for advanced wound care products. However, at-home wound care solutions saw increased adoption as patients sought alternatives to in-clinic treatments.

Despite early challenges, the market recovered with an increased emphasis on infection control and advanced wound management. The pandemic highlighted the urgency for effective, home-based wound care solutions, driving innovations like telemedicine consultations, remote patient monitoring, and self-application wound dressings. These advancements improved

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accessibility, reduced hospital visits, and enhanced patient outcomes. As a result, the industry continues evolving post-pandemic, integrating digital health solutions and personalised treatment approaches to optimise wound care delivery and efficiency.

## Segmentation Analysis

### By Product Type

#### Advanced Wound Dressings to Lead Market Growth Due to Rising Demand for Specialised Care

The advanced wound dressings segment is expected to dominate the wound care market, driven by the increasing prevalence of chronic wounds such as diabetic foot ulcers, pressure ulcers, and venous leg ulcers. These dressings offer moisture retention, infection control, and faster healing, making them essential in modern wound management. Foam dressings, hydrocolloid dressings, film dressings, alginate dressings, and collagen dressings are widely used in hospitals and homecare settings. The demand for customised wound care solutions has further fuelled innovation in this segment.

In January 2024, Coloplast launched Biatain Silicone Fit, an advanced foam dressing designed to cater to both the advanced and traditional wound care markets. This product addresses the need for better conformability and patient comfort, offering improved absorption and retention capabilities. The introduction of next-generation dressings like Biatain Silicone Fit highlighted the growing focus on personalised wound care solutions, contributing to overall market expansion.

#### Surgical Wound Care Segment to Expand with Rising Postoperative Procedures

The surgical wound care segment is gaining traction due to the rising number of surgeries and trauma cases globally. Sutures, staples, tissue adhesives, and sealants are essential in managing surgical wounds efficiently. Additionally, anti-infective dressings play a crucial role in preventing postoperative infections, ensuring better healing outcomes. The increasing adoption of minimally invasive surgical techniques has also contributed to segment growth, driving the need for advanced closure products.

#### Traditional Wound Care Products Remain Crucial for Basic Wound Management

Despite advancements in wound care technologies, traditional wound care products such as bandages, gauzes, cotton, and medical tapes continue to hold a significant share of the market. These products remain essential for primary wound care, first aid, and minor injuries. Traditional wound care solutions are widely used in low-income regions where access to advanced treatments is limited. Additionally, they serve as complementary products in combination therapies, ensuring cost-effective wound management.

#### Wound Care Devices Witness Growing Adoption for Complex Wound Treatment

The wound care devices segment, including negative pressure wound therapy (NPWT), electric stimulation devices, oxygen therapy equipment, and wound closure devices, is witnessing significant growth. These devices are primarily used in chronic and complex wound management, where conventional treatments are insufficient. The rising preference for technologically advanced solutions, coupled with increasing investments in healthcare infrastructure, is driving the adoption of wound care devices.

### By Wound Type

#### Chronic Wound Segment to Grow with Rising Cases of Diabetic Foot Ulcers and Pressure Ulcers

The chronic wounds segment dominates the market due to the increasing prevalence of diabetic foot ulcers, pressure ulcers, and

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venous leg ulcers. With the rising global incidence of diabetes and obesity, the demand for specialised wound care products has surged. Innovations such as bioengineered skin substitutes and growth factor therapies have significantly improved treatment outcomes for chronic wounds, driving market expansion.

The acute wounds segment includes injuries caused by trauma, accidents, and burns. The rising number of road accidents, industrial injuries, and domestic wounds has increased the demand for immediate and effective wound care solutions. The availability of quick-healing dressings, tissue adhesives, and emergency wound care kits has further contributed to the growth of this segment.

The surgical and traumatic wounds segment is expected to witness steady growth due to the rising number of elective and emergency surgeries. Postoperative wound management is critical in reducing infections and improving patient recovery rates. The increasing adoption of minimally invasive procedures has also contributed to the demand for innovative closure products such as staples, sutures, and sealants.

The burn care segment is growing due to the rising number of thermal, chemical, and electrical burns. Burn injuries require specialised dressings and skin grafts, with a growing focus on biologic wound dressings and regenerative therapies. Increasing investments in burn care research and the availability of advanced wound dressings are expected to boost this segment.

#### By End-User

##### Hospitals to Lead Due to Dedicated Wound Care Facilities and Specialised Treatments

Hospitals remain the largest end-users of wound care products, driven by the availability of specialised treatment facilities and skilled healthcare professionals. The presence of dedicated wound care units, advanced diagnostic tools, and post-surgical care infrastructure ensures better patient outcomes. Hospitals also utilise a wide range of wound care products, including negative pressure wound therapy (NPWT) and surgical wound dressings, reinforcing their dominant market share.

Ambulatory surgical centres (ASCs) are gaining popularity due to their cost-effective and efficient wound care services. These facilities provide same-day surgical procedures, reducing hospital stays and associated costs. The increasing adoption of minimally invasive procedures and wound closure solutions has strengthened the role of ASCs in the market.

The homecare segment is expanding due to the growing elderly population and the increasing demand for home-based wound care solutions. Patients with chronic wounds, post-surgical recovery needs, and mobility limitations prefer home-based treatments. The availability of self-application wound dressings, portable NPWT devices, and telemedicine consultations has further driven the adoption of homecare wound management solutions.

#### Wound Care Market Regional Outlook

##### North America

North America holds the largest share driven by the high prevalence of chronic wounds, increasing healthcare spending, and advanced treatment options. The presence of key market players, well-established healthcare infrastructure, and a strong reimbursement framework further support market expansion.

The rising incidence of diabetes and obesity, leading to diabetic foot ulcers and pressure ulcers, has increased demand for advanced wound care products. Additionally, government initiatives, research funding, and continuous technological advancements, such as bioengineered skin substitutes and antimicrobial dressings, contribute to market growth. Regulatory approvals for innovative wound care products further drive market expansion. For instance, in April 2023, 3M and Veraflo

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Therapy received FDA approval, supporting infection control and granulation tissue formation. Such developments reinforce North America's dominance in the wound care industry.

## Europe

Europe is a significant wound care market, supported by favourable healthcare policies, growing elderly population, and increasing cases of diabetic foot ulcers and pressure ulcers. Countries such as Germany, the UK, and France are at the forefront due to strong reimbursement frameworks and high adoption of advanced therapies.

The rising number of surgical procedures and trauma cases, along with a higher awareness of wound management solutions, has fuelled demand for specialised dressings, negative pressure wound therapy (NPWT), and bioactive wound care solutions. Additionally, collaborations between MedTech companies and healthcare institutions are driving innovation in regenerative medicine and smart dressings.

## Asia Pacific

The Asia Pacific wound care market is experiencing rapid growth due to increasing healthcare investments, a growing diabetic population, and rising awareness about advanced wound care solutions. Countries like China, India, and Japan are witnessing significant demand for cost-effective and innovative wound healing therapies. Government initiatives to improve healthcare accessibility, along with rising medical tourism, are boosting demand for modern wound management solutions. The launch of affordable and effective wound care products, particularly in emerging economies, is expected to support market expansion.

## Latin America

Latin America is expected to show steady growth in the wound care industry, driven by improvements in healthcare infrastructure, increasing awareness about wound management, and a rising prevalence of chronic conditions such as diabetes and vascular diseases. Governments are making efforts to enhance healthcare accessibility, while multinational wound care companies are expanding their presence in countries such as Brazil and Mexico. The demand for cost-effective wound dressings and negative pressure wound therapy (NPWT) devices is expected to increase, supporting market growth.

## Middle East & Africa

The Middle East & Africa wound care market is expected to grow due to rising healthcare investments, increasing awareness of chronic wound management, and the development of advanced medical infrastructure. Countries like Saudi Arabia, the UAE, and South Africa are experiencing higher adoption of modern wound healing techniques. Despite challenges such as limited accessibility to advanced treatments in some areas, government initiatives and collaborations with international wound care providers are improving patient outcomes. The growing focus on diabetes care and post-surgical wound management is expected to drive further growth.

## Competitive Landscape

The key features of the market report comprise patent analysis, grants analysis, funding and investment analysis, and strategic initiatives by the leading players. The major companies in the market are as follows:

### 3M Company

3M is a leading player in the wound care market, offering advanced wound dressings, negative pressure wound therapy (NPWT), and antimicrobial solutions. The company is focused on expanding its healthcare segment. For instance, in March 2024, 3M

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announced the approval of its planned spin-off healthcare business, Solventum Corporation, which is likely to enhance its specialisation in wound care and medical solutions. This strategic move is expected to strengthen its market presence and drive innovation.

#### Smith & Nephew plc

Smith & Nephew is a key competitor in the wound care industry, known for its comprehensive portfolio of wound dressings, NPWT systems, and skin substitutes. The company focuses on innovation in regenerative wound healing and smart dressing technology. Its global distribution network and strong R&D investments contribute to its leading market position. Smith & Nephew's strategic acquisitions and collaborations further drive its competitive advantage.

#### Integra LifeSciences Holdings Corporation

Integra LifeSciences is a pioneer in regenerative medicine and bioengineered wound care products. The company specialises in skin substitutes and collagen-based dressings for chronic and surgical wounds. Integra's focus on biologic wound healing solutions positions it as a leader in advanced wound care therapies. Continuous product development and strategic partnerships support its expansion in global markets.

#### Molnlycke Health Care AB

Molnlycke Health Care is renowned for its advanced wound dressings, surgical solutions, and foam dressings. The company prioritises sustainability and innovation in wound healing technologies. With a strong presence in Europe and North America, Molnlycke's focus on high-performance wound dressings and infection prevention solutions enhances its market competitiveness.

Other companies in the market include ConvaTec Group plc., Coloplast A/S, Medtronic plc, Johnson and Johnson Services, Inc., B. Braun Melsungen AG, Paul Hartmann AG and Cardinal Health.

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