

Netherlands Wound Care Management Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

Netherlands Wound Care Management Devices Market Analysis

The Netherlands wound care management devices market is valued at USD 220.46 million in 2025 and is projected to reach USD 280.69 million by 2030, expanding at a 4.95% CAGR over the forecast period. Demand growth is fueled by a rising elderly population, wider use of negative-pressure and sensor-enabled therapies, and the national Fast-Track protocol that has compressed specialist referral times and redirected resources toward higher-value technologies. Hospitals are moving from volume-based purchasing to outcome-focused procurement, prompting manufacturers to emphasize total cost-of-care propositions rather than product features. Retail channels are gaining traction as self-management products and e-commerce platforms make professional-grade dressings accessible to patients. Sustainability mandates, especially restrictions on single-use plastics, are accelerating innovation in bio-based materials and encouraging circular business models for devices and packaging.

Netherlands Wound Care Management Devices Market Trends and Insights

Growing incidence of chronic wounds & diabetic ulcers

Lower diabetic-foot-ulcer incidence of 0.34% among Dutch diabetes patients coexists with a growing elderly population whose frailty pushes chronic wound numbers upward. Pressure ulcers affect 4.2% of nursing-home residents, with more than one-fifth infected, sustaining demand for antimicrobial dressings. Multidisciplinary centers achieve 69% closure rates for recurrent diabetic ulcers within 75 days, extending ulcer-free periods beyond 350 days through reconstructive surgery. Frailty assessments show

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83% prevalence among elderly leg-ulcer patients, underscoring technology needs that address complex comorbidities. Advanced monitoring solutions that adapt to individual healing trajectories are therefore gaining clinical traction.

Rising surgical procedure volumes

Higher surgical throughput has multiplied demand for both prophylactic and therapeutic wound solutions. Closed-incision negative-pressure therapy cut infection rates to 24% from 51% in complex abdominal repairs. In femoral endarterectomy, single-use NPWT lowered complication incidence from 50.8% to 8% while reducing average costs per patient by EUR 588. Burns in patients over 85 years carry a 23.8% mortality rate, pushing hospitals to adopt specialized dressings that accelerate re-epithelialization. As value-based reimbursement gains ground, hospitals increasingly view surgical-wound performance as a determinant of financial health.

High total treatment cost for advanced modalities

Although NPWT accelerates closure, its initial device cost of EUR 2,035 per patient exceeds the EUR 1,919 outlay for conventional care, pressuring hospital budgets. Dutch basic-insurance reimbursement demands rigorous cost-effectiveness evidence before new modalities are listed, slowing adoption for premium innovations. Rising monthly insurance premiums have heightened public scrutiny of medical-device expenditures, leading payers to prioritize solutions with proven economic returns. Outpatient wound-clinic studies indicating EUR 2,621 annual savings per patient therefore focus on care-setting optimization rather than higher-priced technology upgrades.

Other drivers and restraints analyzed in the detailed report include:

Rapidly expanding ageing population / Uptake of negative-pressure & smart-sensor wound-therapy devices / Stringent reimbursement approval in Dutch basic-insurance system /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Wound care devices retained 67.44% share of the Netherlands wound care management devices market in 2024, led by foam dressings, hydrofibers, and negative-pressure platforms that provide superior exudate management and infection control. Smith+Nephew's NPWT line contributed to 3.8% underlying revenue growth in its Advanced Wound Management division during Q1 2025. Clinical studies that position advanced dressings as cost-neutral over an episode of care are sustaining hospital demand even amid reimbursement scrutiny. Wound closure products account for smaller revenue but are expanding at 5.32% CAGR as staplers, sealants, and bioabsorbable clips gain favor in minimally invasive surgery. Sensor-integrated dressings that transmit temperature or pH data to clinicians are blurring category boundaries, enabling hybrid products that both close and monitor wounds.

The Netherlands wound care management devices market size for wound closure solutions is set to climb as procedure volumes rise and surgeons seek devices that limit operative time while improving cosmetic results. Incorporation of antimicrobial coatings into sutures is lowering post-operative infection risk, aligning with hospital quality metrics. Biodegradable adhesives promise avoidance of removal procedures, adding patient convenience. In parallel, developers are embedding microelectronics into adhesives to create intelligent closures capable of reporting tension or moisture in real time, a capability valued by surgical teams pursuing enhanced recovery protocols.

Chronic wounds captured 61.02% of Netherlands wound care management devices market share in 2024, reflecting the

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cumulative effects of aging, vascular disease, and diabetes. Prevalence of pressure ulcers in institutionalized elderly patients drives perpetual consumption of foam and antimicrobial dressings, while NPWT shortens closure timelines for recalcitrant diabetic ulcers. Frailty assessments reveal higher-than-expected care complexity, necessitating technologies that simplify dressing changes and enable caregivers with limited wound expertise. The Netherlands wound care management devices market size for chronic wounds is projected to grow steadily as the population aged 65 + rises and comorbid conditions accumulate.

Acute wounds are forecast to expand faster at 5.76% CAGR, riding on surgical volume growth and improved trauma survival rates. Prophylactic NPWT has demonstrated infection reductions of more than 50% in complex abdominal procedures, encouraging routine use in high-risk surgeries. Burns treatment for older adults remains resource-intensive, reinforcing demand for dressings that speed re-epithelialization while minimizing pain. The Netherlands wound care management devices industry increasingly couples acute-wound therapies with digital monitoring, allowing early intervention when complications emerge.

The Netherlands Wound Care Management Devices Market is Segmented by Product (Wound Care [Dressings, Wound-Care Devices, and More] and Wound Closure [Sutures, Surgical Staplers, and More]), Wound Type (Chronic Wounds and Acute Wounds), End User (Hospitals & Specialty Wound Clinics and More), and Mode of Purchase (Institutional Procurement and Retail / OTC Channel). The Market and Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Solventum / Smiths Group / Molnlycke Health Care / B. Braun / ConvaTec Group plc / Johnson & Johnson / Medtronic / Lohmann & Rauscher GmbH / Hollister / Integra LifeSciences / Hartmann Group / Coloplast / Cardinal Health / Urgo Medical / Medela / Essity (BSN medical) / Organogenesis / Stryker / DermaRite Industries / MiMedx Group / DeRoyal Industries / Bioventus / Kerecis Ehf. /

Additional Benefits:

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

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6.3.7 Medtronic plc

6.3.8 Lohmann & Rauscher GmbH

6.3.9 Hollister Incorporated

6.3.10 Integra LifeSciences

6.3.11 Paul Hartmann AG

6.3.12 Coloplast A/S

6.3.13 Cardinal Health

6.3.14 Urgo Medical

6.3.15 Medela AG

6.3.16 Essity (BSN medical)

6.3.17 Organogenesis Inc.

6.3.18 Stryker Corporation

6.3.19 DermaRite Industries

6.3.20 MiMedx Group

6.3.21 DeRoyal Industries

6.3.22 Bioventus LLC

6.3.23 Kerecis Ehf.

7 Market Opportunities & Future Outlook

7.1 White-space & Unmet-need Assessment

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