

Non-Silver Antimicrobial Dressings Market - A Global and Regional Analysis: Focus on Region, Country-Level Analysis, and Competitive Landscape - Analysis and Forecast, 2023-2030

<https://marketpublishers.com/r/N538ABC1241DEN.html>

Date: June 2024

Pages: 0

Price: US\$ 2,499.00 (Single User License)

ID: N538ABC1241DEN

Abstracts

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Introduction of Non-Silver Antimicrobial Dressings

The global non-silver antimicrobial dressings market, valued at \$420.9 million in 2022, is on a robust growth trajectory and is anticipated to reach \$565.8 million by 2030. This market is expected to expand at a compound annual growth rate (CAGR) of 3.75% between 2023 and 2030. Non-silver antimicrobial dressings have emerged as pivotal tools in advanced woundcare, offering effective solutions in managing chronic wounds and preventing infections.

Market Introduction

With the rising incidence of chronic diseases, coupled with growing awareness of infection control measures, the demand for these dressings continues to surge globally. This introduction provides a glimpse into the dynamic landscape of the non-silver antimicrobial dressings market, poised for significant expansion in the coming years.

Regional Segmentation:

North America

U.S.

Canada

Europe

U.K.

Germany

France

Italy

Spain

Netherlands

Switzerland

Russian Federation

Turkey

Poland

Belgium

Sweden

Ireland

Norway

Austria

Denmark

Finland

Portugal

Czech Republic

Romania

Greece

Slovakia

Ukraine

Asia-Pacific

Japan

China

India

South Korea

Australia

Malaysia

Thailand

Latin America

Brazil

Mexico

Colombia

Argentina

Chile

Rest-of-the-World

The regional analysis of the non-silver antimicrobial dressing market reveals a diversified landscape, with North America leading in market share, followed by Europe, Asia-Pacific, Latin America, and the Rest-of-the-World. North America, with a market value of \$206.8 million in 2022, is anticipated to maintain its dominance throughout the forecast period, driven by factors such as advanced healthcare infrastructure, high adoption of advanced wound care products, and increasing prevalence of chronic wounds. Europe, with a market value of \$104.6 million in 2022, is expected to witness steady growth propelled by rising healthcare expenditure and a growing aging population. Asia-Pacific is expected to emerge as the fastest-growing region with a CAGR of 4.57% from 2022 to 2030, fueled by expanding healthcare facilities, rising awareness of wound care management, and the presence of key market players investing in the region. Latin America and the Rest-of-the-World regions are also expected to show promising growth opportunities, driven by improving healthcare infrastructure and a rising focus on wound care management. This regional analysis underscores the global scope and potential of the non-silver antimicrobial dressing market, with each region contributing uniquely to its overall growth trajectory.

Recent Developments in the Non-Silver Antimicrobial Dressings Market

In November 2023, Kane Biotech Inc., together with ProgenaCare Global LLP ("ProgenaCare"), announced the introduction of the newly rebranded Revyve Antimicrobial Wound Gel, previously known as Coactiv+ Antimicrobial Wound Gel.

In May 2023, Kane Biotech Inc. received 510(k) clearance from the U.S. Food and Drug Administration (FDA) for its coactiv+ Antimicrobial Wound Gel. This clearance permits the use of the gel for managing various wounds in adults, including ulcers (such as diabetic foot and leg and pressure ulcers), first and second-degree burns, partial and full-thickness wounds, large surface area wounds, and surgical incisions.

In February 2022, Argentum Medical, a leader in medical devices backed by Shore Capital and a pioneer in silver-plated nylon technology, announced its acquisition of Anacapa Technologies' product lines, including antimicrobial wound cleansers, gels, and irrigation solutions. Anacapa Technologies has been

recognized as a market leader and innovator in developing antimicrobial wound care products.

In June 2021, at RMIT University, Australia, researchers created advanced wound dressings equipped with embedded nanosensors that emit a glow to notify patients of improper healing. These multifunctional, antimicrobial dressings have been designed with fluorescent sensors that light up under UV light when an infection is present, allowing for monitoring of the healing process.

How can this Report add value to an Organization?

Product/Innovation Strategy: The market analysis provides insights into specific customer needs, enabling organizations to develop customized non-silver antimicrobial dressings that address unique regional requirements, such as climate conditions or prevalent wound types.

Growth/Marketing Strategy: The market analysis allows organizations to implement targeted marketing campaigns tailored to the preferences and behaviors of consumers in that specific region, leading to more effective customer engagement and higher conversion rates.

Competitive Strategy: Organizations can differentiate their non-silver antimicrobial dressings by highlighting features or benefits that are particularly valued by customers in the regional market, such as affordability, ease of use, or compatibility with local wound care protocols.

Methodology

Key Considerations and Assumptions in Market Engineering and Validation

The base year considered for the calculation of the market size is 2022. A historical year analysis has been done for the period FY2019-FY2021. The market size has been estimated for FY2022 and projected for the period FY2023-FY2030.

The scope of this report has been carefully derived based on interactions with experts in different companies worldwide. This report provides a market study of upstream and downstream products of non-silver antimicrobial dressings.

The market contribution of non-silver antimicrobial dressings anticipated to be launched in the future has been calculated based on the historical analysis of the solutions.

Revenues of the companies have been referenced from their annual reports for FY2022 and FY2023. For private companies, revenues have been estimated based on factors such as inputs obtained from primary research, funding history, market collaborations, and operational history.

The market has been mapped based on the available non-silver antimicrobial dressings. This report has considered and profiled all the key companies with significant offerings in this field.

Primary Research:

The primary sources involve industry experts in non-silver antimicrobial dressings, including the market players offering products and services. Resources such as CEOs, vice presidents, marketing directors, and salespersons have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

The key data points taken from the primary sources include:

- Validation and triangulation of all the numbers and graphs

- Validation of the report's segmentation and key qualitative findings

- Understanding the competitive landscape and business model

- Current and proposed production values of a product by market players

- Percentage split of individual markets for regional analysis

Secondary Research:

Open Sources

Certified publications, articles from recognized authors, white papers, directories, and major databases, among others

Annual reports, SEC filings, and investor presentations of the leading market players

Company websites and detailed study of their product portfolio

Gold standard magazines, journals, white papers, press releases, and news articles

Paid databases

The key data points taken from the secondary sources include:

Segmentations and percentage shares

Data for market value

Key industry trends of the top players of the market

Qualitative insights into various aspects of the market, key trends, and emerging areas of innovation

Quantitative data for mathematical and statistical calculations

Key Market Players and Competition Synopsis

The non-silver antimicrobial dressings market has been witnessing intensified competition as key players strive to capitalize on growing demand fueled by the rising incidence of chronic wounds and infections globally. Market leaders are leveraging advanced technologies and strategic collaborations to enhance product efficacy and expand their geographical reach. Innovations in biomaterials and antimicrobial agents are driving product differentiation, while stringent regulatory requirements pose a barrier to entry for new entrants. Moreover, the market has been characterized by a shift toward sustainable and biocompatible materials, driving companies to invest in research and development to gain a competitive edge.

Some prominent names established in this market are:

Cardinal Health

Essity

Winner Medical Co., Ltd.

Medline Industries

DeRoyal Industries, Inc.

Smith & Nephew

Advanced Medical Solutions Limited

L&R Group

Organogenesis Inc.

ConvaTec

Kane Biotech Inc.

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