

Scar Management Market - A Global and Regional Analysis: Focus on Product, Scar Type, End User, and Country Analysis - Analysis and Forecast, 2023-2030

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Abstracts

The global scar management market was valued at \$1,040.1 million in 2022 and is anticipated to reach \$1,594.4 million by 2030, witnessing a CAGR of 5.53% during the forecast period 2023-2030. The growth in the global scar management market is expected to be driven by the increase in the number of scars caused by surgeries, accidents, and burns, which is driving up the demand for solutions to manage them.

Market Lifecycle Stage

The global scar management market is currently in a progressing phase. Scar management has gained focus on introducing new and improved solutions for managing scars resulting from surgeries, injuries, or skin issues. This growing interest is primarily fuelled by the potential to effectively address various types of scars, including atrophic scars, hypertrophic and keloid scars, contracture scars, and stretch marks.

Furthermore, regulatory advancements, ongoing research, and collaborations between medical experts and industry players are contributing to the market's development. These combined efforts indicate a promising future for the global scar management market as it continues to adapt to the needs of people seeking solutions to enhance the appearance of scars. Moreover, as awareness among consumers continues to increase and technology advances, further growth and transformation are anticipated in the scar management market.

Despite the positive outlook, the global scar management market also faces some challenges. One significant challenge is dealing with different rules and regulations in various regions. Some advanced scar management treatments can be expensive,

which can restrict access for certain demographic groups. Moreover, ensuring affordability and accessibility remains a formidable challenge for the industry.

Furthermore, the market offers substantial opportunities. As awareness of scar management solutions continues to expand, there is a growing customer base seeking effective products and treatments. In addition, advances in technology and ongoing research and development efforts offer the potential for innovative and more efficient solutions to emerge, creating opportunities for companies to differentiate themselves. These advancements can further contribute to the overall growth of the market.

Impact

The impact on the global scar management market would be influenced by several factors, such as the increasing number of burn and trauma injuries, which creates a greater need for effective scar management solutions. Ongoing innovations in scar treatment methods continually drive market expansion. Additionally, the growing healthcare spending around the world enables more people to explore scar management options, particularly driven by a heightened focus on aesthetic appearance. Moreover, the rising number of surgical procedures, including cosmetic surgeries, plays a significant role in boosting the demand for scar management products and treatments. Collectively, these factors emphasize the market's crucial role in addressing both medical necessities and the desires of individuals seeking improved scar management solutions.

Furthermore, there are several hurdles to overcome, including complex regulations, strong competition, and need to educate both patients and healthcare professionals. Affordability and patient adherence are also significant challenges. On the bright side, there are opportunities driven by technological advancements, growing demand, increased consumer awareness, and potential collaborations. Achieving growth in this market requires effectively addressing these challenges while capitalizing on the available opportunities.

Impact of COVID-19

The global scar management market experienced significant repercussions due to the outbreak of the COVID-19 pandemic. This global health crisis brought about a range of trans productions, including disruptions to treatments, modifications in recovery timelines, shifts in treatment availability, and interruptions in supply chains. The impact of the pandemic on methods for managing scars varies depending on factors such as

the location, responses of healthcare systems, and individual circumstances. As the situation remains fluid, healthcare practices are likely to adapt to novel standards by incorporating the lessons learned from the pandemic into strategies for scar management.

The deferment or cancellation of scar revision surgeries and laser treatments likely contributed to a decline in scar management procedures. Individuals with scar-related concerns encountered delays in receiving the treatments they sought, affecting their journey toward recovery and healing. Furthermore, the reduced availability of such procedures during the pandemic could have also influenced the sales of products associated with scar management.

Within this context, cosmetic procedures and scar management interventions may have been deprioritized to address more critical medical needs arising from the pandemic. The necessity to allocate resources, medical personnel, and facilities to COVID-19 care could have led healthcare systems to temporarily shift their focus away from non-essential procedures. Therefore, the demand for scar management products and treatments might have experienced a decrease as attention and resources were directed toward combatting the virus and tending to patients with urgent medical requirements.

Market Segmentation:

Segmentation 1: by Product

Silicon Gel and Spray

Silicon Dressing

Cream and Ointment

Others

Based on product, the others segment dominated the global scar management market in FY2022. This dominance can be attributed to the popularity and effectiveness of laser treatments for scar management, making them a preferred choice among consumers and healthcare professionals.

Segmentation 2: by Scar Type

Atrophic Scars

Hypertrophic and Keloid Scars

Others

Based on scar type, the atrophic scars segment dominated the global scar management market in FY2022. This prominence can be attributed to the prevalence of atrophic scars and the growing demand for effective treatments to address this specific scar type.

Segmentation 3: by End User

Hospitals

Specialty Clinics

Home Healthcare (Over-the-Counter (OTC))

Based on end user, the hospitals segment dominated the global scar management market in FY2022. This dominance can be attributed to hospitals being key healthcare providers, often offering comprehensive scar management solutions and treatments to patients.

Segmentation 4: by Region

North America - U.S., Canada

Europe - Germany, U.K., France, Spain, Italy, Portugal, Netherlands, Ireland, Belgium, Switzerland, Norway, Denmark, Sweden, Finland, Czech Republic, Russian Federation, Poland, Austria, Romania, Slovakia, Greece, Türkiye, and Ukraine

Asia-Pacific - China, Japan, India, Australia, South Korea, Thailand, Malaysia, and Rest-of-Asia-Pacific

Latin America - Brazil, Mexico, Argentina, Chile, Colombia, and Rest-of-Latin America

Rest-of-the-World

China dominated the Asia-Pacific market in 2022 with a share of 37.09%. Moreover, Asia-Pacific is expected to register the highest CAGR of 7.14% during the forecast period 2023-2030. Japan accounted for the second largest share of 26.45% of the Asia-Pacific scar management market. In addition, India is the fastest-growing market in the Asia-Pacific region, registering the highest CAGR of 10.97% during the forecast period 2023-2030.

Recent Developments in the Global Scar Management Market

In October 2022, Foshan United Medical Technologies Ltd. collaborated with both business and regulatory bodies to develop standardized product norms for silicone scar gel products. The culmination of this effort resulted in the creation of a scientific paper titled 'The Evaluation and its Method on Moisture Retention of Silicone Scar Gel.'

In August 2021, Merz Therapeutics and Acino signed a distribution agreement in Ukraine, CIS, and Mongolia. Acino would be responsible for commercializing Merz Therapeutics' product portfolio, covering areas such as hepatic encephalopathy, Parkinson's disease, scar, and hair treatment.

In September 2021, Sonoma Pharmaceuticals, Inc. launched three innovative products for consumers. These products, namely, Regenacyn advanced scar gel, Ocucyn eyelid, and eyelash cleanser, were made available for purchase without a prescription, making them easily accessible to consumers.

Demand – Drivers, Restraints and Opportunities

Market Demand Drivers:

Rising Incidence of Burn and Trauma Injuries

Innovative Scar Treatment Approaches

Rising Healthcare Expenditure

Presence of Concern Related to Aesthetic Appearances Leads to an Upsurge of Cosmetic-Related Surgeries and Scar Management

Increasing Number of Surgical Procedures

Market Restraints:

High Procedural Costs Associated with Scar Treatments and Management Solutions

Lack of Patient Awareness Regarding Scar Management Solutions

Market Opportunities:

Emergence of Remote Monitoring and Digital Health Solutions

How can this report add value to an organization?

Workflow/Innovation Strategy: The scar management market (by scar type) comprises atrophic scars, hypertrophic and keloid scars, contracture scars, and stretch marks. Moreover, the study provides the reader with a detailed understanding of the various types of scars and associated products tailored to address these scars.

Growth/Marketing Strategy: The scar management market's growth strategy includes innovation, expansion into emerging markets, collaboration with healthcare professionals, and regulatory streamlining. These efforts aim to enhance accessibility and meet the diverse needs of consumers.

Competitive Strategy: Key players in the global scar management market have been analyzed and profiled in the study, including new product launches and strategic collaborations. Moreover, a detailed competitive benchmarking of the players operating in the global scar management market has been done to help the reader understand

how players stack against each other, presenting a clear market landscape. Additionally, comprehensive competitive strategies such as partnerships, agreements, and collaborations will aid the reader in understanding the untapped revenue pockets in the market.

Key Market Players and Competition Synopsis

The global scar management market is experiencing significant growth driven by increasing awareness of scar-related issues, advancements in medical technology, and growing demand for aesthetic treatments. Scar management encompasses a range of products designed to improve the appearance and functionality of scars resulting from injuries, surgeries, burns, or medical conditions, such as silicone sheets, scar gels, creams, and ointments are widely used over-the-counter (OTC) scar management products. These products offer convenience and self-administration options for individuals. This market growth is primarily driven by factors such as the prevalence of burn injuries, increasing numbers of surgical procedures, and traumatic incidents, all contributing to a demand for effective scar management products and professional treatments. The scar management market is divided into distinct segments, including product, scar type, and end user.

The companies that are profiled have been selected based on inputs gathered from primary experts and analyzing company coverage, product portfolio, and market penetration.

Key Companies Profiled:

Advancis Medical

Bayer AG

B. Braun S.E.

Bio Med Sciences, Inc.

Covalon Technologies Ltd.

Derma E

M?Inlycke Health Care AB

Newmedical Technology Inc.

Quantum Health

Smith & Nephew

Sonoma Pharmaceuticals, Inc.

Stratpharma AG

Scar Heal, Inc.

Weigao Group

Winner Medical Co., Ltd.

Contents

1 MARKET

- 1.1 Product Definition
- 1.2 Inclusion Criteria for the Report
- 1.3 Exclusion Criteria for the Report
- 1.4 Key Findings

2 INDUSTRY OUTLOOK

- 2.1 Market Overview
- 2.2 Market Trends
- 2.3 Impact of COVID-19 on Scar Management
- 2.4 Supply Chain Analysis
 - 2.4.1 Key Entities in Supply Chain
- 2.5 Purchasing Channels
- 2.6 Reimbursement Scenario
 - 2.6.1 Reimbursement Scenario in North America
 - 2.6.2 Reimbursement Scenario in Europe

3 MARKET DYNAMICS

- 3.1 Overview
- 3.2 Impact Analysis
- 3.3 Market Drivers
 - 3.3.1 Rising Incidences of Burn and Trauma Injuries
 - 3.3.2 Innovative Scar Treatment Approaches
 - 3.3.3 Rising Healthcare Expenditure
 - 3.3.4 Presence of Concern Related to Aesthetic Appearances Leads to an Upsurge of Cosmetic-Related Surgeries and Scar Management
 - 3.3.5 Increasing Number of Surgical Procedures
- 3.4 Market Restraints
 - 3.4.1 High Procedural Costs Associated with Scar Treatments and Management Solutions
 - 3.4.2 Lack of Patient Awareness Regarding Scar Management Solutions
- 3.5 Market Opportunities
 - 3.5.1 Emergence of Remote Monitoring and Digital Health Solutions

4 GLOBAL SCAR MANAGEMENT MARKET, BY PRODUCT

- 4.1 Overview
- 4.2 Product Benchmarking
- 4.3 Silicon Gel and Spray
- 4.4 Silicon Dressing
- 4.5 Cream and Ointment
- 4.6 Others

5 GLOBAL SCAR MANAGEMENT MARKET, BY SCAR TYPE

- 5.1 Overview
- 5.2 Atrophic Scars
- 5.3 Hypertrophic and Keloid Scars
- 5.4 Others

6 GLOBAL SCAR MANAGEMENT MARKET, BY END USER

- 6.1 Overview
- 6.2 Hospitals
- 6.3 Specialty Clinics
- 6.4 Home Healthcare (Over-the-Counter (OTC))

7 GLOBAL SCAR MANAGEMENT MARKET, BY REGION

- 7.1 Overview
- 7.2 North America
 - 7.2.1 Legal Framework and Regulatory Requirement
 - 7.2.2 Market Dynamics
 - 7.2.3 Market Size and Forecast
 - 7.2.3.1 North America Scar Management Market (by Product)
 - 7.2.3.2 North America Scar Management Market (by Scar Type)
 - 7.2.3.3 North America Scar Management Market (by End User)
 - 7.2.3.4 North America Scar Management Market, (by Country)
 - 7.2.3.4.1 U.S.
 - 7.2.3.4.1.1 Market Dynamics
 - 7.2.3.4.1.2 Market Sizing and Forecast
 - 7.2.3.4.1.2.1 U.S. Scar Management Market (by Product)
 - 7.2.3.4.2 Canada

7.2.3.4.2.1 Market Dynamics

7.2.3.4.2.2 Market Sizing and Forecast

7.2.3.4.2.2.1 Canada Scar Management Market (by Product)

7.3 Europe

7.3.1 Legal Framework and Regulatory Requirement

7.3.2 Market Dynamics

7.3.3 Market Sizing and Forecast

7.3.3.1 Europe Scar Management Market (by Product)

7.3.3.2 Europe Scar Management Market (by Scar Type)

7.3.3.3 Europe Scar Management Market (by End User)

7.3.3.4 Europe Scar Management Market, (by Country)

7.3.3.4.1 Germany

7.3.3.4.1.1 Market Dynamics

7.3.3.4.1.2 Market Sizing and Forecast

7.3.3.4.1.2.1 Germany Scar Management Market (by Product)

7.3.3.4.2 France

7.3.3.4.2.1 Market Dynamics

7.3.3.4.2.2 Market Sizing and Forecast

7.3.3.4.2.2.1 France Scar Management Market (by Product)

7.3.3.4.3 U.K.

7.3.3.4.3.1 Market Dynamics

7.3.3.4.3.2 Market Sizing and Forecast

7.3.3.4.3.2.1 U.K. Scar Management Market (by Product)

7.3.3.4.4 Italy

7.3.3.4.4.1 Market Dynamics

7.3.3.4.4.2 Market Sizing and Forecast

7.3.3.4.4.2.1 Italy Scar Management Market (by Product)

7.3.3.4.5 Spain

7.3.3.4.5.1 Market Dynamics

7.3.3.4.5.2 Market Sizing and Forecast

7.3.3.4.5.2.1 Spain Scar Management Market (by Product)

7.3.3.4.6 Portugal

7.3.3.4.6.1 Market Dynamics

7.3.3.4.6.2 Market Sizing and Forecast

7.3.3.4.6.2.1 Portugal Scar Management Market (by Product)

7.3.3.4.7 Netherlands

7.3.3.4.7.1 Market Dynamics

7.3.3.4.7.2 Market Sizing and Forecast

7.3.3.4.7.2.1 Netherland Scar Management Market (by Product)

- 7.3.3.4.8 Ireland
 - 7.3.3.4.8.1 Market Dynamics
 - 7.3.3.4.8.2 Market Sizing and Forecast
 - 7.3.3.4.8.2.1 Ireland Scar Management Market (by Product)
- 7.3.3.4.9 Belgium
 - 7.3.3.4.9.1 Market Dynamics
 - 7.3.3.4.9.2 Market Sizing and Forecast
 - 7.3.3.4.9.2.1 Belgium Scar Management Market (by Product)
- 7.3.3.4.10 Switzerland
 - 7.3.3.4.10.1 Market Dynamics
 - 7.3.3.4.10.2 Market Sizing and Forecast
 - 7.3.3.4.10.2.1 Switzerland Scar Management Market (by Product)
- 7.3.3.4.11 Norway
 - 7.3.3.4.11.1 Market Dynamics
 - 7.3.3.4.11.2 Market Sizing and Forecast
 - 7.3.3.4.11.2.1 Norway Scar Management Market (by Product)
- 7.3.3.4.12 Denmark
 - 7.3.3.4.12.1 Market Dynamics
 - 7.3.3.4.12.2 Market Sizing and Forecast
 - 7.3.3.4.12.2.1 Denmark Scar Management Market (by Product)
- 7.3.3.4.13 Sweden
 - 7.3.3.4.13.1 Market Dynamics
 - 7.3.3.4.13.2 Market Sizing and Forecast
 - 7.3.3.4.13.2.1 Sweden Scar Management Market (by Product)
- 7.3.3.4.14 Finland
 - 7.3.3.4.14.1 Market Dynamics
 - 7.3.3.4.14.2 Market Sizing and Forecast
 - 7.3.3.4.14.2.1 Finland Scar Management Market (by Product)
- 7.3.3.4.15 Czech Republic
 - 7.3.3.4.15.1 Market Dynamics
 - 7.3.3.4.15.2 Market Size and Forecast
 - 7.3.3.4.15.2.1 Czech Republic Scar Management Market (by Product)
- 7.3.3.4.16 Russian Federation
 - 7.3.3.4.16.1 Market Dynamics
 - 7.3.3.4.16.2 Market Size and Forecast
 - 7.3.3.4.16.2.1 Russia Federation Scar Management Market (by Product)
- 7.3.3.4.17 Poland
 - 7.3.3.4.17.1 Market Dynamics
 - 7.3.3.4.17.2 Market Size and Forecast

- 7.3.3.4.17.2.1 Poland Scar Management Market (by Product)
- 7.3.3.4.18 Austria
 - 7.3.3.4.18.1 Market Dynamics
 - 7.3.3.4.18.2 Market Size and Forecast
 - 7.3.3.4.18.2.1 Austria Scar Management Market (by Product)
- 7.3.3.4.19 Romania
 - 7.3.3.4.19.1 Market Dynamics
 - 7.3.3.4.19.2 Market Size and Forecast
 - 7.3.3.4.19.2.1 Romania Scar Management Market (by Product)
- 7.3.3.4.20 Slovakia
 - 7.3.3.4.20.1 Market Dynamics
 - 7.3.3.4.20.2 Market Size and Forecast
 - 7.3.3.4.20.2.1 Slovakia Scar Management Market (by Product)
- 7.3.3.4.21 Greece
 - 7.3.3.4.21.1 Market Dynamics
 - 7.3.3.4.21.2 Market Size and Forecast
 - 7.3.3.4.21.2.1 Greece Scar Management Market (by Product)
- 7.3.3.4.22 Türkiye
 - 7.3.3.4.22.1 Market Dynamics
 - 7.3.3.4.22.2 Market Size and Forecast
 - 7.3.3.4.22.2.1 Türkiye Scar Management Market (by Product)
- 7.3.3.4.23 Ukraine
 - 7.3.3.4.23.1 Market Dynamics
 - 7.3.3.4.23.2 Market Size and Forecast
 - 7.3.3.4.23.2.1 Ukraine Scar Management Market (by Product)
- 7.4 Asia-Pacific
 - 7.4.1 Legal Framework and Regulatory Requirement
 - 7.4.2 Market Dynamics
 - 7.4.3 Market Sizing and Forecast
 - 7.4.3.1 Asia-Pacific Scar Management Market (by Product)
 - 7.4.3.2 Asia-Pacific Scar Management Market (by Scar Type)
 - 7.4.3.3 Asia-Pacific Scar Management Market (by End User)
 - 7.4.3.4 Asia-Pacific Scar Management Market, (by Country)
 - 7.4.3.4.1 China
 - 7.4.3.4.1.1 Market Dynamics
 - 7.4.3.4.1.2 Market Size and Forecast
 - 7.4.3.4.1.2.1 China Scar Management Market (by Product)
 - 7.4.3.4.2 Japan
 - 7.4.3.4.2.1 Market Dynamics

- 7.4.3.4.2.2 Market Size and Forecast
 - 7.4.3.4.2.2.1 Japan Scar Management Market (by Product)
- 7.4.3.4.3 Malaysia
 - 7.4.3.4.3.1 Market Dynamics
 - 7.4.3.4.3.2 Market Sizing and Forecast
 - 7.4.3.4.3.2.1 Malaysia Scar Management Market (by Product)
- 7.4.3.4.4 India
 - 7.4.3.4.4.1 Market Dynamics
 - 7.4.3.4.4.2 Market Size and Forecast
 - 7.4.3.4.4.2.1 India Scar Management Market (by Product)
- 7.4.3.4.5 Australia
 - 7.4.3.4.5.1 Market Dynamics
 - 7.4.3.4.5.2 Market Sizing and Forecast
 - 7.4.3.4.5.2.1 Australia Scar Management Market (by Product)
- 7.4.3.5 Thailand
 - 7.4.3.5.1 Market Dynamics
 - 7.4.3.5.2 Market Size and Forecast
 - 7.4.3.5.2.1 Thailand Scar Management Market (by Product)
- 7.4.3.6 South Korea
 - 7.4.3.6.1 Market Dynamics
 - 7.4.3.6.2 Market Sizing and Forecast
 - 7.4.3.6.2.1 South Korea Scar Management Market (by Product)
- 7.4.3.7 Rest-of-Asia-Pacific
 - 7.4.3.7.1 Market Sizing and Forecast
 - 7.4.3.7.1.1 Rest of Asia-Pacific Scar Management Market (by Product)
- 7.5 Latin America
 - 7.5.1 Legal Framework and Regulatory Requirement
 - 7.5.2 Market Dynamics
 - 7.5.3 Market Size and Forecast
 - 7.5.3.1 Latin America Scar Management Market (by Product)
 - 7.5.3.2 Latin America Scar Management Market (by Scar Type)
 - 7.5.3.3 Latin America Scar Management Market (by End User)
 - 7.5.3.4 Latin America Scar Management Market (by Country)
 - 7.5.3.4.1 Mexico
 - 7.5.3.4.1.1 Market Dynamics
 - 7.5.3.4.1.2 Market Size and Forecast
 - 7.5.3.4.1.2.1 Mexico Scar Management Market (by Product)
 - 7.5.3.4.2 Argentina
 - 7.5.3.4.2.1 Market Dynamics

- 7.5.3.4.2.2 Market Size and Forecast
 - 7.5.3.4.2.2.1 Argentina Scar Management Market (by Product)
- 7.5.3.4.3 Brazil
 - 7.5.3.4.3.1 Market Dynamics
 - 7.5.3.4.3.2 Market Size and Forecast
 - 7.5.3.4.3.2.1 Brazil Scar Management Market (by Product)
- 7.5.3.4.4 Chile
 - 7.5.3.4.4.1 Market Dynamics
 - 7.5.3.4.4.2 Market Size and Forecast
 - 7.5.3.4.4.2.1 Chile Scar Management Market (by Product)
- 7.5.3.4.5 Colombia
 - 7.5.3.4.5.1 Market Dynamics
 - 7.5.3.4.5.2 Market Sizing and Forecast
 - 7.5.3.4.5.2.1 Colombia Scar Management Market (by Product)
- 7.5.3.4.6 Rest-of-Latin America
 - 7.5.3.4.6.1 Market Sizing and Forecast
 - 7.5.3.4.6.1.1 Rest of Latin America Scar Management Market (by Product)
- 7.6 Rest-of-the-World
 - 7.6.1 Market Dynamics
 - 7.6.2 Market Sizing and Forecast
 - 7.6.2.1 Rest-of-the-World Scar Management Market (by Product)
 - 7.6.2.2 Rest-of-the-World Scar Management Market (by Scar Type)
 - 7.6.2.3 Rest-of-the-World Scar Management Market (by End User)

8 MARKETS - COMPETITIVE BENCHMARKING & COMPANY PROFILES

- 8.1 Competitive Landscape
 - 8.1.1 Overview
 - 8.1.2 Business Strategies
 - 8.1.2.1 Product Launches/Approvals
- 8.2 Scar Management Ecosystem Active Players
- 8.3 Company Profiles
 - 8.3.1 Advancis Medical
 - 8.3.1.1 Company Overview
 - 8.3.1.2 Role of Advancis Medical in the Global Scar Management Market
 - 8.3.1.3 Analyst Perspectives
 - 8.3.2 Bayer AG
 - 8.3.2.1 Company Overview
 - 8.3.2.2 Role of Bayer AG in the Global Scar Management Market

- 8.3.2.3 Financials
- 8.3.2.4 Target Customers
- 8.3.2.5 Analyst Perspectives
- 8.3.3 B. Braun S.E.
 - 8.3.3.1 Company Overview
 - 8.3.3.2 Role of B. Braun S.E. in the Global Scar Management Market
 - 8.3.3.3 Financials
 - 8.3.3.4 Target Customers
 - 8.3.3.5 Analyst Perspectives
- 8.3.4 Bio Med Sciences, Inc.
 - 8.3.4.1 Company Overview
 - 8.3.4.2 Role of Bio Med Sciences, Inc. in the Global Scar Management Market
 - 8.3.4.3 Target Customers
 - 8.3.4.4 Analyst Perspectives
- 8.3.5 Covalon Technologies Ltd.
 - 8.3.5.1 Company Overview
 - 8.3.5.2 Role of Covalon Technologies Ltd. in the Global Scar Management Market
 - 8.3.5.3 Financials
 - 8.3.5.4 Target Customers
 - 8.3.5.5 Analyst Perspectives
- 8.3.6 Derma E
 - 8.3.6.1 Company Overview
 - 8.3.6.2 Role of Derma E in the Global Scar Management Market
 - 8.3.6.3 Target Customers
 - 8.3.6.4 Analyst Perspectives
- 8.3.7 M?Inlycke Health Care AB
 - 8.3.7.1 Company Overview
 - 8.3.7.2 Role of M?Inlycke Health Care AB in the Global Scar Management Market
 - 8.3.7.3 Financials
 - 8.3.7.4 Target Customers
 - 8.3.7.5 Analyst Perspectives
- 8.3.8 Newmedical Technology Inc.
 - 8.3.8.1 Company Overview
 - 8.3.8.2 Role of Newmedical Technology Inc. in the Global Scar Management Market
 - 8.3.8.3 Target Customers
 - 8.3.8.4 Analyst Perspectives
- 8.3.9 Quantum Health
 - 8.3.9.1 Company Overview
 - 8.3.9.2 Role of Quantum Health in the Global Scar Management Market

- 8.3.9.3 Target Customers
- 8.3.9.4 Analyst Perspectives
- 8.3.10 Smith & Nephew
 - 8.3.10.1 Company Overview
 - 8.3.10.2 Role of Smith & Nephew in the Global Scar Management Market
 - 8.3.10.3 Financials
 - 8.3.10.4 Target Customers
 - 8.3.10.5 Analyst Perspectives
- 8.3.11 Sonoma Pharmaceuticals, Inc.
 - 8.3.11.1 Company Overview
 - 8.3.11.2 Role of Sonoma Pharmaceuticals, Inc. in the Global Scar Management Market
 - 8.3.11.3 Financials
 - 8.3.11.4 Target Customers
 - 8.3.11.5 Analyst Perspectives
- 8.3.12 Stratpharma AG
 - 8.3.12.1 Company Overview
 - 8.3.12.2 Role of Stratpharma AG in the Global Scar Management Market
 - 8.3.12.3 Target Customers
 - 8.3.12.4 Analyst Perspectives
- 8.3.13 Scar Heal, Inc.
 - 8.3.13.1 Company Overview
 - 8.3.13.2 Role of Scar Heal, Inc. in the Global Scar Management Market
 - 8.3.13.3 Target Customers
 - 8.3.13.4 Analyst Perspectives
- 8.3.14 Weigao Group
 - 8.3.14.1 Company Overview
 - 8.3.14.2 Role of Weigao Group in the Global Scar Management Market
 - 8.3.14.3 Financials
 - 8.3.14.4 Target Customers
 - 8.3.14.5 Analyst Perspectives
- 8.3.15 Winner Medical Co., Ltd.
 - 8.3.15.1 Company Overview
 - 8.3.15.2 Role of Winner Medical Co., Ltd. in the Global Scar Management Market
 - 8.3.15.3 Target Customers
 - 8.3.15.4 Analyst Perspectives

List Of Figures

LIST OF FIGURES

- Figure 1: Global Scar Management Market, \$Billion, 2021-2030
- Figure 2: Global Scar Management Market, Product Benchmarking
- Figure 3: Global Scar Management Market (by Product), % Share, 2022 and 2030
- Figure 4: Global Scar Management Market (by Scar Type), % Share, 2022 and 2030
- Figure 5: Global Scar Management Market (by End User), % Share, 2022 and 2030
- Figure 6: Global Scar Management Market (by Region), \$Billion, 2022 and 2030
- Figure 7: Global Scar Management Market Segmentation
- Figure 8: Global Scar Management Market: Research Methodology
- Figure 9: Primary Research Methodology
- Figure 10: Bottom-Up Approach (Segment-Wise Analysis)
- Figure 11: Top-Down Approach (Segment-Wise Analysis)
- Figure 12: Algorithm of Scar Management
- Figure 13: Impact of COVID-19 on Scar Management
- Figure 14: Supply Chain Analysis
- Figure 15: Purchasing Channels for Scar Management Products
- Figure 16: Global Scar Management Market: Market Dynamics
- Figure 17: Global Incidence Cases of Burn, 1990 and 2019
- Figure 18: Approaches for Scar Treatment
- Figure 19: Percentage of Healthcare Expenditure on GDP, 2018, 2019, and 2020
- Figure 20: Enhancing Scar Management in Several Ways
- Figure 21: Global Scar Management Market (by Product)
- Figure 22: Global Scar Management Market (by Product), % Share, 2022 and 2030
- Figure 23: Global Scar Management Market, Product Benchmarking
- Figure 24: Global Scar Management Market (Silicon Gel and Spray), \$Million, 2021-2030
- Figure 25: Global Scar Management Market (Silicon Dressing), \$Million, 2021-2030
- Figure 26: Global Scar Management Market (Cream and Ointment), \$Million, 2021-2030
- Figure 27: Global Scar Management Market (Others), \$Million, 2021-2030
- Figure 28: Global Scar Management Market (by Scar Type)
- Figure 29: Global Scar Management Market (by Scar Type), % Share, 2022 and 2030
- Figure 30: Global Scar Management Market (Atrophic Scars), \$Million, 2021-2030
- Figure 31: Global Scar Management Market (Hypertrophic and Keloid Scars), \$Million, 2021-2030
- Figure 32: Global Scar Management Market (Others), \$Million, 2021-2030
- Figure 33: Global Scar Management Market (by End User)

- Figure 34: Global Scar Management Market (by End User), % Share, 2022 and 2030
- Figure 35: Global Scar Management Market (Hospitals), \$Million, 2021-2030
- Figure 36: Global Scar Management Market (Specialty Clinics), \$Million, 2021-2030
- Figure 37: Global Scar Management Market (Home Healthcare (Over-the-Counter (OTC))), \$Million, 2021-2030
- Figure 38: Global Scar Management Market (by Region), Snapshot
- Figure 39: North America Scar Management Market, \$Million, 2021-2030
- Figure 40: North America Scar Management Market (by Product), \$Million, 2021-2030
- Figure 41: North America Scar Management Market (by Scar Type), \$Million, 2021-2030
- Figure 42: North America Scar Management Market (by End User), \$Million, 2021-2030
- Figure 43: North America Scar Management Market (by Country), \$Million, 2021-2030
- Figure 44: U.S. Scar Management Market, \$Million, 2021-2030
- Figure 45: U.S. Scar Management Market (by Product), \$Million, 2021-2030
- Figure 46: Canada Scar Management Market, \$Million, 2021-2030
- Figure 47: Canada Scar Management Market (by Product), \$Million, 2021-2030
- Figure 48: Europe Scar Management Market, \$Million, 2021-2030
- Figure 49: Europe Scar Management Market (by Product), \$Million, 2021-2030
- Figure 50: Europe Scar Management Market (by Scar Type), \$Million, 2021-2030
- Figure 51: Europe Scar Management Market (by End User), \$Million, 2021-2030
- Figure 52: Europe Scar Management Market (by Country), \$Million, 2022 and 2030
- Figure 53: Germany Scar Management Market, \$Million, 2021-2030
- Figure 54: Germany Scar Management Market (by Product), \$Million, 2021-2030
- Figure 55: France Scar Management Market, \$Million, 2021-2030
- Figure 56: France Scar Management Market (by Product), \$Million, 2021-2030
- Figure 57: U.K. Scar Management Market, \$Million, 2021-2030
- Figure 58: U.K. Scar Management Market (by Product), \$Million, 2021-2030
- Figure 59: Italy Scar Management Market, \$Million, 2021-2030
- Figure 60: Italy Scar Management Market (by Product), \$Million, 2021-2030
- Figure 61: Spain Scar Management Market, \$Million, 2021-2030
- Figure 62: Spain Scar Management Market (by Product), \$Million, 2021-2030
- Figure 63: Portugal Scar Management Market, \$Million, 2021-2030
- Figure 64: Portugal Scar Management Market (by Product), \$Million, 2021-2030
- Figure 65: Netherlands Scar Management Market, \$Million, 2021-2030
- Figure 66: Netherland Scar Management Market (by Product), \$Million, 2021-2030
- Figure 67: Ireland Scar Management Market, \$Million, 2021-2030
- Figure 68: Ireland Scar Management Market (by Product), \$Million, 2021-2030
- Figure 69: Belgium Scar Management Market, \$Million, 2021-2030
- Figure 70: Belgium Scar Management Market (by Product), \$Million, 2021-2030

- Figure 71: Switzerland Scar Management Market, \$Million, 2021-2030
- Figure 72: Switzerland Scar Management Market (by Product), \$Million, 2021-2030
- Figure 73: Norway Scar Management Market, \$Million, 2021-2030
- Figure 74: Norway Scar Management Market (by Product), \$Million, 2021-2030
- Figure 75: Denmark Scar Management Market, \$Million, 2021-2030
- Figure 76: Denmark Scar Management Market (by Product), \$Million, 2021-2030
- Figure 77: Sweden Scar Management Market, \$Million, 2021-2030
- Figure 78: Sweden Scar Management Market (by Product), \$Million, 2021-2030
- Figure 79: Finland Scar Management Market, \$Million, 2021-2030
- Figure 80: Finland Scar Management Market (by Product), \$Million, 2021-2030
- Figure 81: Czech Republic Scar Management Market, \$Million, 2021-2030
- Figure 82: Czech Republic Scar Management Market (by Product), \$Million, 2021-2030
- Figure 83: Russian Federation Scar Management Market, \$Million, 2021-2030
- Figure 84: Russia Federation Scar Management Market (by Product), \$Million, 2021-2030
- Figure 85: Poland Scar Management Market, \$Million, 2021-2030
- Figure 86: Poland Scar Management Market (by Product), \$Million, 2021-2030
- Figure 87: Austria Scar Management Market, \$Million, 2021-2030
- Figure 88: Austria Scar Management Market (by Product), \$Million, 2021-2030
- Figure 89: Romania Scar Management Market, \$Million, 2021-2030
- Figure 90: Romania Scar Management Market (by Product), \$Million, 2021-2030
- Figure 91: Slovakia Scar Management Market, \$Million, 2021-2030
- Figure 92: Slovakia Scar Management Market (by Product), \$Million, 2021-2030
- Figure 93: Greece Scar Management Market, \$Million, 2021-2030
- Figure 94: Greece Scar Management Market (by Product), \$Million, 2021-2030
- Figure 95: Türkiye Scar Management Market, \$Million, 2021-2030
- Figure 96: Türkiye Scar Management Market (by Product), \$Million, 2021-2030
- Figure 97: Ukraine Scar Management Market, \$Million, 2021-2030
- Figure 98: Ukraine Scar Management Market (by Product), \$Million, 2021-2030
- Figure 99: Asia-Pacific Scar Management Market, \$Million, 2021-2030
- Figure 100: Asia-Pacific Scar Management Market (by Product), \$Million, 2021-2030
- Figure 101: Asia-Pacific Scar Management Market (by Scar Type), \$Million, 2021-2030
- Figure 102: Asia-Pacific Scar Management Market (by End User), \$Million, 2021-2030
- Figure 103: Asia-Pacific Scar Management Market (by Country), \$Million, 2021-2030
- Figure 104: China Scar Management Market, \$Million, 2021-2030
- Figure 105: China Scar Management Market (by Product), \$Million, 2021-2030
- Figure 106: Japan Scar Management Market, \$Million, 2021-2030
- Figure 107: Japan Scar Management Market (by Product), \$Million, 2021-2030
- Figure 108: Malaysia Scar Management Market, \$Million, 2021-2030

- Figure 109: Malaysia Scar Management Market (by Product), \$Million, 2021-2030
- Figure 110: India Scar Management Market, \$Million, 2021-2030
- Figure 111: India Scar Management Market (by Product), \$Million, 2021-2030
- Figure 112: Australia Scar Management Market, \$Million, 2021-2030
- Figure 113: Australia Scar Management Market (by Product), \$Million, 2021-2030
- Figure 114: Thailand Scar Management Market, \$Million, 2021-2030
- Figure 115: Thailand Scar Management Market (by Product), \$Million, 2021-2030
- Figure 116: South Korea Scar Management Market, \$Million, 2021-2030
- Figure 117: South Korea Scar Management Market (by Product), \$Million, 2021-2030
- Figure 118: Rest-of-Asia-Pacific Scar Management Market, \$Million, 2021-2030
- Figure 119: Rest of Asia-Pacific Scar Management Market (by Product), \$Million, 2021-2030
- Figure 120: Latin America Scar Management Market, \$Million, 2021-2030
- Figure 121: Latin America Scar Management Market (by Product), \$Million, 2021-2030
- Figure 122: Latin America Scar Management Market (by Scar Type), \$Million, 2021-2030
- Figure 123: Latin America Scar Management Market (by End User), \$Million, 2021-2030
- Figure 124: Latin America Scar Management Market (by Country), \$Million, 2021-2030
- Figure 125: Mexico Scar Management Market, \$Million, 2021-2030
- Figure 126: Mexico Scar Management Market (by Product), \$Million, 2021-2030
- Figure 127: Argentina Scar Management Market, \$Million, 2021-2030
- Figure 128: Argentina Scar Management Market (by Product), \$Million, 2021-2030
- Figure 129: Brazil Scar Management Market, \$Million, 2021-2030
- Figure 130: Brazil Scar Management Market (by Product), \$Million, 2021-2030
- Figure 131: Chile Scar Management Market, \$Million, 2021-2030
- Figure 132: Chile Scar Management Market (by Product), \$Million, 2021-2030
- Figure 133: Colombia Scar Management Market, \$Million, 2021-2030
- Figure 134: Colombia Scar Management Market (by Product), \$Million, 2021-2030
- Figure 135: Rest-of-Latin America Scar Management Market, \$Million, 2021-2030
- Figure 136: Rest of Latin America Scar Management Market (by Product), \$Million, 2021-2030
- Figure 137: Rest-of-the-World Scar Management Market, \$Million, 2021-2030
- Figure 138: Rest-of-the-World Scar Management Market (by Product), \$Million, 2021-2030
- Figure 139: Rest-of-the-World Scar Management Market (by Scar Type), \$Million, 2021-2030
- Figure 140: Rest-of-the-World Scar Management Market (by End User), \$Million, 2021-2030
- Figure 141: Share of Key Developments, January 2018-July 2023

Figure 142: Number of Product Launches/Approvals (by Company), June 2018-July 2023

Figure 143: Global Scar Management Market, Total Number of Companies Profiled

Figure 144: Advancis Medical: Product Portfolio

Figure 145: Bayer AG: Product Portfolio

Figure 146: Bayer AG: Overall Financials, 2020-2022

Figure 147: Bayer AG: Net Revenue (by Business Segment), \$Million, 2020-2022

Figure 148: Bayer AG: Net Revenue (by Business Sub-Segment), \$Million, 2020-2022

Figure 149: Bayer AG: Net Revenue (by Region), \$Million, 2020-2022

Figure 150: Bayer AG: Net Revenue (by Country), \$Million, 2020-2022

Figure 151: B. Braun S.E.: Product Portfolio

Figure 152: B. Braun S.E.: Overall Financials, 2020-2022

Figure 153: Bio Med Sciences, Inc.: Product Portfolio

Figure 154: Covalon Technologies Ltd.: Product Portfolio

Figure 155: Covalon Technologies Ltd.: Overall Financials, 2020-2022

Figure 156: Covalon Technologies Ltd.: Net Revenue (by Geography), \$Million, 2021-2023

Figure 157: Derma E: Product Portfolio

Figure 158: M?Inlycke Health Care AB: Product Portfolio

Figure 159: M?Inlycke Health Care AB: Overall Financials, 2020-2022

Figure 160: M?Inlycke Health Care AB: Net Revenue (by Segment), \$Million, 2020-2022

Figure 161: M?Inlycke Health Care AB: Net Revenue (by Geography), \$Million, 2020-2022

Figure 162: M?Inlycke Health Care AB: Net Revenue (by Channel), \$Million, 2020-2022

Figure 163: Newmedical Technology Inc.: Product Portfolio

Figure 164: Quantum Health: Product Portfolio

Figure 165: Smith & Nephew: Product Portfolio

Figure 166: Smith & Nephew: Overall Financials, 2020-2022

Figure 167: Smith & Nephew: Net Revenue (by Business Segment), \$Million, 2020-2022

Figure 168: Smith & Nephew: Net Revenue (Advanced Wound Management, by Product), \$Million, 2020-2022

Figure 169: Smith & Nephew: Net Revenue (by Country), \$Million, 2020-2022

Figure 170: Sonoma Pharmaceuticals, Inc.: Product Portfolio

Figure 171: Sonoma Pharmaceuticals, Inc.: Overall Financials, 2021-2023

Figure 172: Sonoma Pharmaceuticals, Inc.: Net Revenue (by Business Segment), \$Million, 2021-2023

Figure 173: Sonoma Pharmaceuticals, Inc.: Net Revenue (by Geography), \$Million, 2021-2023

Figure 174: Stratpharma AG: Product Portfolio

Figure 175: Scar Heal, Inc.: Product Portfolio

Figure 176: Weigao Group: Product Portfolio

Figure 177: Weigao Group: Overall Financials, 2020-2022

Figure 178: Weigao Group.: Net Revenue (by Business Segment), \$Million, 2021-2023

Figure 179: Weigao Group: Net Revenue (by Geography), \$Million, 2020-2022

Figure 180: Winner Medical Co., Ltd.: Product Portfolio

List Of Tables

LIST OF TABLES

Table 1: Key Questions Answered in the Report

Table 2: Some Examples of Codes Related to Scar Management

Table 3: Impact Analysis, Market Drivers, and Restraints

Table 4: Number of Surgical Procedures Performed in Hospitals, 2010 and 2020

Table 5: Clinical Cost for Scar Treatment

Table 6: North America Scar Management Market, Regulatory Landscape

Table 7: North America Scar Management Market, Market Dynamics, Impact Analysis

Table 8: Europe Scar Management Market, Regulatory Landscape

Table 9: Europe Scar Management Market, Market Dynamics, Impact Analysis

Table 10: Asia-Pacific Scar Management Market, Regulatory Landscape

Table 11: Asia-Pacific Scar Management Market, Market Dynamics, Impact Analysis

Table 12: Latin America Scar Management Market, Regulatory Landscape

Table 13: Latin America Scar Management Market, Market Dynamics, Impact Analysis

Table 14: Rest-of-the-World Scar Management Market, Market Dynamics, Impact Analysis

Table 15: Global Scar Management Market, Key Active Players

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