

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

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Abstracts

Intro on Wound Cleanser Market

The global wound cleanser market was valued at \$1,873.4 million in 2022 and is expected to reach \$2,434.3 million by 2030, growing at a CAGR of 3.34% between 2023 and 2030. The key factors driving the growth of the global wound cleanser market include the increase in prevalence of chronic disease leading to increased utilization of wound cleansers, rising number of surgical and trauma cases, rising acceptance and utilization of wound cleanser products, rise in prevalence of wound infections, a growing number of specialties wound care clinics creating a demand for advanced wound care products.

Market Introduction

A wound cleanser is a type of solution or product designed to clean and irrigate wounds. It is used as part of wound care management to promote proper wound healing, prevent infection, and maintain overall wound hygiene. The wound cleanser market refers to products used for cleaning and disinfecting wounds. These products are typically used to clean and prepare wounds for further medical treatment, such as dressing application or suturing. The wound cleanser market includes a variety of products designed to remove debris, bacteria, and other contaminants from wounds to promote healing and reduce the risk of infection.

Impact

The wound cleanser market has made an impact in the following ways:

Improved Wound Care Practices: The introduction of advanced wound cleansers has led to improved wound care practices. These cleansers might offer better solutions for cleaning wounds effectively, reducing the risk of infection, and promoting faster healing.

Reduced Infection Rates: Wound cleansers with antimicrobial properties have contributed to reduced infection rates in various healthcare settings. These products could help prevent the growth of bacteria and other pathogens in wounds, minimizing the risk of complications.

Faster Healing Times: Innovations in wound cleanser formulations lead to faster wound healing times. These products might facilitate the removal of debris and dead tissue, allowing the body to focus on repairing the wound more efficiently.

Increased Patient Comfort: Gentle and effective wound cleansers have improved patient comfort during wound care procedures. Reduced pain and irritation during cleansing would lead to better compliance with treatment regimens.

Lower Healthcare Costs: By preventing complications and promoting faster healing, wound cleansers have contributed to lower healthcare costs. Reduced infection rates and shorter hospital stays would lead to financial savings for both patients and healthcare systems.

Enhanced Accessibility: Advances in wound cleanser technologies have made these products more accessible to a wider range of healthcare facilities, from hospitals to clinics and even home care settings. This increased accessibility would ensure that patients receive appropriate wound care regardless of their location.

Integration of New Technologies: The wound cleanser market may have incorporated new technologies, such as smart wound cleansers that monitor healing progress or offer automated dosing. These innovations could lead to more personalized and effective wound care approaches.

Research and Development: Continued growth in the wound cleanser market has encouraged further research and development in wound care products. This might include exploring novel ingredients, formulations, and delivery methods to continually improve outcomes.

Impact of COVID-19

The COVID-19 pandemic has had a multifaceted impact on the wound cleanser market. Shifting healthcare priorities toward managing the pandemic led to delayed wound care and disruptions in supply chains. Hospitals' strain on resources affected wound care services, while telemedicine gained prominence. The pandemic highlighted infection prevention's importance, potentially increasing demand for wound cleansers. Innovations addressed challenges such as delayed healing in COVID-19 survivors. Regulatory changes were introduced for medical product availability. As the world recovers, the wound cleanser market adapts to the pandemic's influence on healthcare delivery, with potential long-term effects on chronic wound care and strategic adjustments in response.

Market Segmentation:

Segmentation 1: by Product

Commercial Cleanser

Saline

Commercial Cleansers to Occupy the Largest Share in the Global Wound Cleanser Market (by Product)

Commercial Cleanser: Commercial wound cleansers are specially formulated products designed to effectively cleanse wounds and promote a healthy wound-healing environment. These cleansers are available in various formulations and formats, each tailored to address specific wound care needs. They often contain a combination of active ingredients that aid in the removal of debris, bacteria, and contaminants from the wound while supporting the healing process.

Saline: Saline wound cleansers, also known as saline solutions or normal saline, are widely used in wound care for cleansing and irrigating wounds. Saline cleansers consist of a sterile solution of sodium chloride (salt) dissolved in purified water. This isotonic solution closely resembles the body's natural fluids and is commonly used for wound cleansing due to its safety, effectiveness, and gentle nature.

Segmentation 2: by Wound

Chronic Wound

Acute Wound

Acute Wounds to Dominate the Global Wound Cleanser Market (by Wound Type)

Chronic Wound: Chronic wounds are complex, physiochemically compromised injuries resulting from disruptions in the normal wound-healing process, including cellular interventions. They often arise as complications of chronic diseases such as diabetes, where around 15-25% of individuals with diabetes are at risk of developing chronic wounds such as pressure ulcers or diabetic foot ulcers. Unlike acute wounds that heal predictably, chronic wounds resist healing or lack a predetermined healing timeline. Common examples include contaminated or infected surgical wounds, pressure ulcers, diabetic foot ulcers, venous leg ulcers, and ischemic ulcers.

Acute Wound: An acute wound is a sudden injury to the skin that heals predictably and within an expected timeframe, typically 4-6 weeks, following the normal wound healing process. These wounds are a result of external forces or objects causing a puncture or break in the skin layers. Acute wounds, which occur during the initial phase of healing, have a well-defined healing trajectory. The global incidence of acute wounds is on the rise, with over 60% of cases reported in developed regions.

Segmentation 3: by End User

Hospitals

Specialty Clinics

Home Healthcare (Over the Counter (OTC))

Hospitals to Dominate the Global Wound Cleanser Market (by End User)

Based on end users, the hospital segment is expected to register the highest growth among all the end users, which can be attributed to the rise in the geriatric population, increase in public funding, and cost-effectiveness, among others.

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, Turkey, and Ukraine

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

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

Rest-of-the-World

China dominated the Asia-Pacific wound cleanser market in 2022 with a share of 33.15%. The factors fueling this growth include the increasing demand for wound recovery products, the rising incidence of chronic wounds, and the escalating number of surgical procedures across the region. The prevalence of diabetes in China is a significant characteristic, leading to an increased necessity for the wound cleanser market to address the risk of delayed healing in diabetic patients. Diabetic patients often experience foot ulcers, a common and disabling complication that can result in leg amputation. In 2021, the International Diabetes Federation (IDF) reported that China had 140.9 million cases of diabetes, accounting for 10.6% of the population. This number is projected to rise by 164.06 million by 2030, with an estimated 72.83 million cases going undiagnosed in 2021. This high incidence of diabetes translates into a significant demand for diabetic foot care management due to the associated rise in diabetic foot ulcers.

Recent Developments in the Wound Cleanser Market

In April 2023, Sanara MedTech Inc. announced the receipt of 510(k) clearance for Biasurge advanced surgical solution, which is a patented composition utilizing its Biakos technology. Biasurge has been designed for mechanical cleansing and removal of debris, including microorganisms, from wounds.

In January 2023, Sonoma Pharmaceuticals, Inc. announced the distribution and pricing agreement for its Microcyn Rx products, which has been officially granted by the Defense Logistics Agency. This marks a significant milestone as it allows for the distribution of Microcyn Rx products through the DLA's network.

In November 2021, Sonoma Pharmaceuticals, Inc. and Dyamed Biotech Pte Ltd. announced an expanded long-term partnership focused on Singapore, Malaysia, Indonesia, and Thailand. This collaboration aims to leverage Sonoma's Microcyn technology, benefiting patients and healthcare providers alike.

In March 2021, Sonoma Pharmaceuticals, Inc. announced an agreement with EMC Pharma, LLC, to oversee, promote, and distribute Sonoma's prescription dermatology and eye care products based on HOCl within the U.S. This partnership will be in effect for an initial term of five years, with the possibility of an extension beyond that period.

In November 2022, InfuSystem Holdings, Inc. and Sanara MedTech Inc. established a partnership for SI Wound Care, LLC, 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 innovative products, including Cork Medical LLC's negative pressure wound therapy devices and supplies and Sanara's advanced wound care product line to new customers through the jointly controlled entity.

In June 2023, the VeriCyn Wound Wash medical device by Armis Biopharma received 510(k) clearance from the FDA for use in cleansing wounds of debris.

In April 2023, Convatec acquired technology from the U.K.-based firm 30 Technology, giving rise to conjecture about the timing and method of its integration into Convatec's existing product line.

In February 2023, Shore Capital Partners sold Argentum Medical to BioDerm.

In May 2023, NovaBay Pharmaceuticals, Inc. reported that China Pioneer Pharma Holdings, Limited had initiated a purchase of NovaBay's NeutroPhase Skin and Wound Cleanser, amounting to \$1 million. NovaBay has effectively completed the fulfillment of this order and anticipates recognizing the associated revenue during the second quarter of 2023.

In May 2019, Smith & Nephew acquired Osiris Therapeutics, Inc. Osiris Therapeutics, Inc. specializes in the development and promotion of regenerative medicines products for wound care, orthopedics, and sports medicine.

In April 2023, Sanara MedTech Inc. received the FDA 510(k) clearance for the advanced surgical solution known as BiaSurges.

Demand – Drivers and Limitations

Market Demand Drivers:

Increase in Prevalence of Chronic Disease Leading to Increase Utilization of Wound Cleansers: An increase in the prevalence of chronic diseases contributes to an increase in wound infections. Chronic diseases have seen a swift rise on a global scale and are accountable for 63% of all worldwide deaths. These diseases impact around 133 million people in the U.S. alone, which is over 40% of the entire population. The projections for 2020 are even more significant, with an expected increase to around 157 million individuals affected, and a substantial portion of them having multiple conditions.

Rising Number of Surgical and Trauma Cases: There is substantial anticipation of a surge in surgical procedures due to improved healthcare accessibility and the expanding elderly demographic. Approximately 313 million surgical procedures are conducted worldwide on an annual basis. There is substantial anticipation of a surge in surgical procedures due to improved healthcare accessibility and the expanding elderly demographic.

Rising Acceptance and Utilization of Wound Cleanser Products: Due to a growing focus on personal health and cleanliness, there's been a huge increase in people wanting products for cleaning wounds. People are more aware of their health and are taking action to stay healthy, even consulting doctors earlier. Taking care of both quick-healing and long-lasting wounds early is important for getting better and faster healing. As more people learn to read and understand health information, they're finding out about ways to handle small injuries at home.

Rise in Prevalence of Wound Infections: Wound infections pose a significant safety risk for both healthcare professionals and patients. Infections arise when wounds are not treated promptly. The initial step in wound care is cleansing the infected area, which

significantly aids the healing process. Due to the increasing global patient numbers and population, the demand for wound cleansers is consistently rising. Burn wound infections contribute largely to overall wound infections.

Growing Number of Specialty Wound Care Clinics Creating a Demand for Advanced Wound Care Products: The increasing prevalence of specialty wound care clinics is generating a higher demand for advanced wound care products. These clinics, dedicated to addressing complex and chronic wounds, require specialized products that go beyond traditional wound care solutions. The demand for advanced wound care products is fuelled by the unique needs of these clinics, which often treat patients with hard-to-heal wounds, diabetic ulcers, pressure ulcers, and other challenging conditions.

Market Restraints:

Lack of Medical Education and Awareness: In terms of the financial burden on health and social care providers as well as the effect on patient quality of life (QoL), the presence of a wound is a significant burden. European Wound Management Association advises that people involved in their care and treatment have the necessary knowledge and abilities because the management of chronic wounds is complex and can have a negative impact on patient outcomes.

Lack of Adequate Reimbursement Policies: The lack of adequate reimbursement policies for wound cleansers in healthcare systems can impede patient access, increase costs for individuals, strain healthcare facilities, limit provider choices, stifle innovation, and exacerbate healthcare disparities.

Market Opportunities:

Expansion into Emerging Economies: The expanding wound cleanser market presents significant opportunities in developing nations such as China, India, Brazil, Saudi Arabia, and Singapore. These countries possess substantial potential due to factors such as population growth, unmet medical demands, and increased healthcare expenditure. The rising healthcare spending in the Middle East further enhances the prospects for wound cleanser manufacturers. Additionally, the growth of per capita disposable income is anticipated to contribute to the expansion of the wound cleanser market in these regions.

How Can This Report Add Value to an Organization?

Product/Innovation Strategy: The global wound cleanser market has been extensively segmented based on various categories, such as products, types, wound types, end users, and regions. This can help readers get a clear overview of which segments account for the largest share and which ones are well-positioned to grow in the coming years.

Key Market Players and Competition Synopsis

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:

3M

ACTO GmbH

Argentum Medical, LLC

B. Braun S.E.

Bactiguard AB

Coloplast Group

Cardinal Health, Inc.

Gentell, Inc.

Hollister Incorporated

Medline Industries, LP

M?Inlycke Health Care AB

Sch?lke & Mayr GmbH

Smith & Nephew

Sonoma Pharmaceuticals, Inc.

Sanara Medtech, Inc.

Urgo Medical

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