

Wound Skin Substitutes Market - A Global and Regional Analysis: Focus on Region, Country-Level Analysis, and Competitive Landscape - Analysis and Forecast, 2023-2030

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Abstracts

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Introduction of Wound Skin Substitutes

The global wound skin substitutes market, valued at \$1,181.0 million in 2022, is on a robust growth trajectory and is anticipated to reach \$2,062.6 million by 2030. This market is expected to expand at a compound annual growth rate (CAGR) of 7.35% between 2023 and 2030. Driven by the increasing prevalence of chronic wounds such as diabetic foot ulcers, pressure ulcers, and venous leg ulcers, the market is witnessing a surge in demand for innovative and effective wound healing solutions.

Market Introduction

Technological advancements in biomaterials and the development of more efficient skin substitute products are further fueling this growth. Moreover, the rising geriatric population, which is more prone to chronic conditions, and the expanding capabilities of healthcare infrastructures globally are significant contributors to the market's expansion. This growth has also been supported by a growing focus on improving patient outcomes and reducing the overall healthcare costs associated with chronic wounds.

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 global wound skin substitutes market has been dominated by North America, which held a 78.12% share in 2022. This significant share can be attributed to several factors, including an aging population, the steep rise in the prevalence of obesity that is heavily correlated to diabetes, and the late effects of radiation therapies. These factors have further boosted the adoption of wound skin substitutes among patients, thereby boosting revenue growth. Asia-Pacific, Europe, and Latin America regions are expected to witness significant growth in the wound skin substitutes market due to a surge in the incidence rate of chronic wounds, technological advancements leading to the development of innovative products, and increasing healthcare expenditure.

Recent Developments in the Wound Skin Substitutes Market

In July 2023, Coloplast announced an agreement to acquire Kerecis for up to \$1.3 billion. Kerecis has pioneered patented technology for treating wounds and burns by utilizing unaltered fish skin.

In April 2023, Coloplast (Kerecis) announced MariGen Shield, which integrates the company's proven fish-skin graft with a silicone contact layer for treating chronic and complex wounds.

In January 2023, Coloplast (Kerecis) announced the release of two new products for the burn market, GraftGuide Mano and GraftGuide Micro. This latest innovation is a specialized fish skin product tailored for treating burns specifically on the hand.

In January 2022, Researchers from the University of Birmingham and the University of Huddersfield, UK, developed a new 3D bioprinting technique that could be used to treat chronic wounds.

In October 2021, Coloplast (Kerecis) received authorization from the FDA to market Kerecis Omega3 SurgiBind. This implant is a fish-skin graft that can be implanted for plastic and reconstructive surgical procedures.

How can this report add value to an organization?

Product/Innovation Strategy: By understanding specific regional needs and preferences highlighted in the report, a company can tailor its product development to address local market demands effectively. This might include innovation in skin substitute materials that cater to prevalent wound types in a particular region.

Growth/Marketing Strategy: With detailed regional data, companies can craft precise marketing strategies that resonate with local healthcare providers and patients. This includes choosing the right channels and messages that appeal to the specific demographic and economic conditions of the region.

Competitive Strategy: The report provides an analysis of key competitors in the region, allowing companies to benchmark their products and strategies. Knowing the competitive landscape helps in positioning their offerings more effectively to capture market share.

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 wound skin substitutes.

The market contribution of wound skin substitutes 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 wound skin substitute solutions. 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 wound skin substitutes, 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 competitive landscape of the wound skin substitutes market has been characterized by the presence of several key players, each offering a range of specialized products. Coloplast, for instance, has made significant strides with products such as MariGen Shield, GraftGuide Mano, and GraftGuide Micro, which are tailored to address various aspects of wound care, particularly burns and complex wounds. The companies are not only innovating in product development but also expanding their market reach and setting industry standards in the treatment of complex wounds. This dynamic competitive environment underscores the continuous evolution and technological advancement within the wound care industry.

Some prominent names established in this market are:

Coloplast

Smith & Nephew

MTF Biologics

MiMedx Group, Inc

AlloSource

Organogenesis Inc.

RTI Surgical

LifeNet Health

Molecular Biologicals, Inc

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