

Global Wound Care Market: Analysis By Product (Advanced wound Care, Traditional Wound Care, Wound Therapy Devices, Surgical Wound Care), By Application (Chronic and Acute), By Mode of Purchase (Prescribed and Non-Prescribed), By End User (Hospitals, Specialty Clinics, Home Care Settings and Others), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2029

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Abstracts

Wound care refers to the medical practice of treating and managing wounds to promote healing, prevent complications, and restore the integrity of the skin or tissue. Wounds can be of various types, including cuts, burns, surgical incisions, ulcers, or injuries resulting from trauma. The primary goal of wound care is to support the natural healing process by maintaining a clean, moist environment, protecting the wound from infection, and ensuring proper circulation to the affected area. The global wound care market value in 2023 stood at US\$22.06 billion, and is likely to reach US\$30.01 billion by 2029.

The wound care market has experienced significant growth over the years primarily due to advancements in wound care technologies and treatments, which offer more effective management of complex and chronic wounds. The rise in the global elderly population, increased prevalence of chronic conditions like diabetes, and a greater focus on improving patient outcomes have also driven market expansion. Additionally, growing awareness about wound care and innovations in advanced wound dressings and therapies have further contributed to the sector's growth. Other significant trends including advancements in wound care products, rising demand for home healthcare, telemedicine and remote monitoring, growth of bioactive wound care products, growth in

emerging markets, etc. are expected to drive market growth further. The global wound care market value is projected to grow at a CAGR of 5.26%, during the forecast period of 2024-2029.

Market Segmentation Analysis:

By Product: According to the report, the global wound care market is bifurcated into four segments based on the product: advanced wound care, traditional wound care, wound therapy devices and surgical wound care. Advanced Wound Care segment acquired majority of share in the market in 2023 and is the fastest growing segment as well due to its superior ability to address complex and chronic wounds more effectively than traditional methods. This segment includes innovative products such as advanced dressings, biologics, and skin substitutes that promote faster healing and better outcomes. The increasing prevalence of chronic conditions like diabetes and obesity, which lead to complex wound types, has driven demand for these advanced solutions. Additionally, the segment benefits from ongoing technological advancements and a focus on personalized wound care, contributing to its rapid growth and dominant market position.

By Application: According to the report, the global wound care market is bifurcated into two applications: chronic and acute. Chronic segment acquired majority of share in the market in 2023 and is the fastest growing segment as well due to the increasing prevalence of chronic conditions such as diabetes, venous ulcers, and pressure sores, which require ongoing, specialized care. Chronic wounds present persistent challenges and demand advanced and prolonged treatment solutions, driving significant market growth. The aging population and the prevalence of lifestyle-related diseases have further exacerbated the need for effective chronic wound management. Additionally, the continuous advancements in wound care technologies tailored for chronic wounds contribute to this segment's dominant market position and rapid expansion.

By Mode of Purchase: According to the report, the global wound care market is bifurcated into two modes of purchase: Prescribed and non-prescribed. Prescribed segment acquired majority of share in the market in 2023, and is the fastest growing segment as well due to the increasing reliance on healthcare professionals for wound management. Prescribed wound care products are typically recommended by healthcare providers based on specific patient needs, ensuring more precise and effective treatment. This segment benefits from the growing prevalence of complex and chronic wounds that require specialized and regulated care, as well as from the expansion of healthcare infrastructure and the emphasis on personalized medicine. The

rising demand for high-quality, evidence-based wound care solutions further drives the growth of the prescribed segment, reflecting its critical role in optimal patient outcomes.

By End-user: According to the report, the global wound care market is bifurcated into four end-users: hospitals, specialty clinics, home care settings and others. Hospitals segment acquired majority of share in the market in 2023 due to the high volume of wound care procedures performed in these settings, including complex surgeries and advanced wound management treatments. Hospitals are equipped with specialized facilities and a range of advanced wound care technologies necessary for addressing severe and intricate wounds. The prevalence of acute and chronic wounds among hospitalized patients, coupled with the need for continuous and comprehensive care, drives significant demand for wound care products and services in hospitals. However, the home care settings segment is expected to be the fastest-growing due to a shifting preference towards in-home care driven by factors such as cost-effectiveness, patient comfort, and a desire for personalized care. Advances in wound care technologies have made it feasible for complex wound management to be conducted outside of hospital environments, allowing patients to receive high-quality care in the comfort of their homes. Additionally, the rise in home healthcare services and remote monitoring technologies supports effective management of wounds at home, contributing to the segment's rapid growth.

By Region: The report provides insight into the wound care market based on the geographical operations, namely, North America, Europe, Asia Pacific, Latin America and Middle East and Africa. North America wound care market enjoyed the highest market share in 2023 due to the region's advanced healthcare infrastructure, high prevalence of chronic diseases, and significant investment in medical technologies. The presence of leading wound care companies and a well-established network of healthcare providers contribute to the region's dominance. Additionally, North America benefits from a robust healthcare reimbursement system that supports the adoption of advanced wound care solutions. The growing elderly population and increasing awareness about innovative wound care treatments further drive market growth in this region. The combination of these factors positions North America as a leader in the global wound care market.

While, Asia Pacific region has been experiencing the fastest growth in the global wound care market due to several key factors, including rapid economic development, a large and aging population, and increasing healthcare investments. The region's expanding healthcare infrastructure and rising prevalence of chronic diseases such as diabetes and hypertension have driven demand for advanced wound care solutions. Additionally,

growing awareness about wound care and improvements in healthcare access contribute to the market's expansion. The influx of multinational companies investing in the region and local innovations in wound care technologies further accelerate growth, making Asia Pacific a dynamic and rapidly evolving market for wound care products and services.

Global Wound Care Market Dynamics:

Growth Drivers: The surging geriatric population is a significant growth driver of the global wound care market due to the increased prevalence of chronic conditions and wounds associated with aging. As the elderly population grows, there is a higher incidence of age-related health issues such as diabetes, venous ulcers, and pressure sores, which require advanced and ongoing wound care management. Older adults are more prone to wounds that are difficult to heal, necessitating specialized treatments and products. The demand for effective wound care solutions to manage these complex and chronic wounds is rising in tandem with the aging demographic. This trend is driving market growth. Other factors driving the growth of global wound care market include increasing healthcare expenditure, increasing spread of chronic diseases, rise in traumatic injuries, increase in surgical procedures, favorable government initiatives etc.

Challenges: One significant challenge faced by the global wound care market is the high cost of advanced wound care products and technologies, which can limit accessibility and affordability for patients and healthcare systems. The development and manufacturing of cutting-edge wound care solutions, such as advanced dressings, biologics, and wound therapy devices, involve substantial research and production costs. These expenses are often passed on to healthcare providers and patients, leading to financial burdens, particularly in regions with less robust healthcare reimbursement systems. The high cost can hinder the widespread adoption of these innovative treatments, affecting overall market growth and patient outcomes. Other challenge might include complexity of wound care.

Trends: A key trend in the global wound care market is the continuous advancements in wound care products, which significantly enhance the efficacy and efficiency of wound management. Innovations such as advanced wound dressings, biologics, and tissue-engineered products are transforming the treatment landscape by promoting faster healing, reducing infection risks, and improving patient comfort. These advanced products incorporate technologies like antimicrobial agents, moisture management, and bioactive compounds to address complex and chronic wounds more effectively. Additionally, developments in digital health and remote monitoring are enabling better

management and personalized care for patients. As research and technology progress, these advancements drive market growth by offering superior solutions to traditional wound care methods, meeting the increasing demand for more effective and patient-centric treatments. The market is also projected to grow at a fast pace during the forecast period, due to various other latest trends such as rising demand for home healthcare, telemedicine and remote monitoring, growth of bioactive wound care products, growth in emerging markets, etc.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic negatively impacted the wound care market by disrupting supply chains and healthcare services, leading to delays in wound care treatments and a reduction in elective procedures. Additionally, the focus on managing COVID-19 cases diverted resources and attention away from wound care needs. However, in the post-COVID scenario, the wound care market is expected to recover and grow due to the resumption of elective procedures and increased investments in advanced wound care technologies, as well as a renewed focus on improving patient outcomes and managing chronic wounds effectively.

Competitive Landscape and Recent Developments:

The global wound care market is fragmented and competitive catering to domestic and international demand. Players operating in the global wound care market focus on providing high-quality products to fulfill customer demand. These players have a well-established customer base and dominate the market ranking with a high market share in the global wound care market. Key players of global wound care market are:

Smith & Nephew Plc
Baxter International Inc.
Integra LifeSciences Holdings Corporation
Convatec Group Plc
Coloplast Group
M?Inlycke AB
Johnson & Johnson (Ethicon Inc.)
Medtronic plc
Cardinal Health, Inc.
3M Company
Zimmer Biomet Holdings, Inc.
PAUL HARTMANN AG

MiMedx Group, Inc.
Medline Industries, LP
DeRoyal Industries, Inc.

The key players are constantly investing in strategic initiatives, such as adoption of new technologies, introducing their products to emerging markets and more, to maintain a competitive edge in this market. For instance, in September 2023, MiMedx Group, Inc. launched EPIEFFECT, an advanced wound care solution, to expand its product portfolio. Also, in May 2023, Smith & Nephew received an innovative technology contract from Vizient, Inc. for its PICO Single Use Negative Pressure Wound Therapy Systems.

Contents

1. EXECUTIVE SUMMARY

2. INTRODUCTION

2.1 Wound Care: An Overview

2.1.1 Definition of Wound Care

2.1.2 Key Components of Wound Care

2.2 Wound Care Segmentation: An Overview

2.2.1 Wound Care Segmentation

3. GLOBAL MARKET ANALYSIS

3.1 Global Wound Care Market: An Analysis

3.1.1 Global Wound Care Market: An Overview

3.1.2 Global Wound Care Market by Value

3.1.3 Global Wound Care Market by Product (Advanced wound Care, Traditional Wound Care, Wound Therapy Devices, Surgical Wound Care)

3.1.4 Global Wound Care Market by Application (Chronic and Acute)

3.1.5 Global Wound Care Market by Mode of Purchase (Prescribed and Non-Prescribed)

3.1.6 Global Wound Care Market by End Use (Hospitals, Specialty Clinics, Home Care Settings and Others)

3.1.7 Global Wound Care Market by Region (North America, Europe, Asia Pacific, Latin America and Middle East & Africa)

3.2 Global Wound Care Market: Product Analysis

3.2.1 Global Wound Care Market: Product Overview

3.2.2 Global Advanced Wound Care Market by Value

3.2.3 Global Traditional Wound Care Market by Value

3.2.4 Global Wound Care Therapy Devices Market by Value

3.2.5 Global Surgical Wound Care Market by Value

3.3 Global Wound Care Market: Application Analysis

3.3.1 Global Wound Care Market by Application: An Overview

3.3.2 Global Chronic Wound Care Market by Value

3.3.3 Global Acute Wound Care Market by Value

3.4 Global Wound Care Market: Mode of Purchase Analysis

3.4.1 Global Wound Care Market: Mode of Purchase Overview

3.4.2 Global Prescribed Wound Care Market by Value

- 3.4.3 Global Non-Prescribed (OTCs) Wound Care Market by Value
- 3.5 Global Wound Care Market: End Use Analysis
 - 3.5.1 Global Wound Care Market: End Use Overview
 - 3.5.2 Global Hospitals Wound Care Market by Value
 - 3.5.3 Global Specialty Clinics Wound Care Market by Value
 - 3.5.4 Global Home Care Settings Wound Care Market by Value
 - 3.5.5 Global Others Wound Care Market by Value

4. REGIONAL MARKET ANALYSIS

- 4.1 North America Wound Care Market: An Analysis
 - 4.1.1 North America Wound Care Market: An Overview
 - 4.1.2 North America Wound Care Market by Value
 - 4.1.3 North America Wound Care Market by Region (The US, Canada, Mexico)
 - 4.1.4 The US Wound Care Market by Value
 - 4.1.5 The US Wound Care Market by Product (Advanced wound Care, Traditional Wound Care, Wound Therapy Devices, Surgical Wound Care)
 - 4.1.6 The US Wound Care Market Product by Value
 - 4.1.7 Canada Wound Care Market by Value
 - 4.1.8 Mexico Wound Care Market by Value
- 4.2 Europe Wound Care Market: An Analysis
 - 4.2.1 Europe Wound Care Market: An Overview
 - 4.2.2 Europe Wound Care Market by Value
 - 4.2.3 Europe Wound Care Market by Region (Germany, UK, France, Italy, Spain and Rest of Europe)
 - 4.2.4 Germany Wound Care Market by Value
 - 4.2.5 UK Wound Care Market by Value
 - 4.2.6 France Wound Care Market by Value
 - 4.2.7 Italy Wound Care Market by Value
 - 4.2.8 Spain Wound Care Market by Value
 - 4.2.9 Rest of Europe Wound Care Market by Value
- 4.3 Asia Pacific Wound Care Market: An Analysis
 - 4.3.1 Asia Pacific Wound Care Market: An Overview
 - 4.3.2 Asia Pacific Wound Care Market by Value
 - 4.3.3 Asia Pacific Wound Care Market by Region (China, Japan, India and Rest of Asia Pacific)
 - 4.3.4 China Wound Care Market by Value
 - 4.3.5 Japan Wound Care Market by Value
 - 4.3.6 India Wound Care Market by Value

- 4.3.7 Rest of Asia Pacific Wound Care Market by Value
- 4.4 Latin America Wound Care Market: An Analysis
 - 4.4.1 Latin America Wound Care Market: An Overview
 - 4.4.2 Latin America Wound Care Market by Value
- 4.5 Middle East and Africa Wound Care Market: An Analysis
 - 4.5.1 Middle East and Africa Wound Care Market: An Overview
 - 4.5.2 Middle East and Africa Wound Care Market by Value

5. IMPACT OF COVID-19

- 5.1 Impact of COVID-19 on Global Wound Care Market
- 5.2 Post COVID-19 Impact on Global Wound Care Market

6. MARKET DYNAMICS

- 6.1 Growth Drivers
 - 6.1.1 Surging Geriatric Population
 - 6.1.2 Rising Healthcare Expenditure
 - 6.1.3 Increasing Spread of Chronic Diseases
 - 6.1.4 Rise in Traumatic Injuries
 - 6.1.5 Increase in Surgical Procedures
 - 6.1.6 Favorable Government Initiatives
- 6.2 Challenges
 - 6.2.1 High Costs
 - 6.2.2 Complexity of Wound Care
- 6.3 Market Trends
 - 6.3.1 Advancements in Wound Care Products
 - 6.3.2 Rising Demand for Home Healthcare
 - 6.3.3 Telemedicine and Remote Monitoring
 - 6.3.4 Growth of Bioactive Wound Care Products
 - 6.3.5 Growth in Emerging Markets

7. COMPETITIVE LANDSCAPE

- 7.1 Global Wound Care Market: Competitive Landscape
- 7.2 Global Wound Care Market Players: Recent Developments

8. COMPANY PROFILES

- 8.1 Smith & Nephew Plc
 - 8.1.1 Business Overview
 - 8.1.2 Operating Segments
 - 8.1.3 Business Strategies
- 8.2 Baxter International Inc.
 - 8.2.1 Business Overview
 - 8.2.2 Operating Segments
 - 8.2.3 Business Strategies
- 8.3 Integra LifeSciences Holdings Corporation
 - 8.3.1 Business Overview
 - 8.3.2 Operating Segments
 - 8.3.3 Business Strategy
- 8.4 Convatec Group Plc
 - 8.4.1 Business Overview
 - 8.4.2 Revenue by Category
 - 8.4.3 Business Strategy
- 8.5 Coloplast Group
 - 8.5.1 Business Overview
 - 8.5.2 Operating Segments
 - 8.5.3 Business Strategy
- 8.6 M?Inlycke AB
 - 8.6.1 Business Overview
 - 8.6.2 Operating Segments
 - 8.6.3 Business Strategy
- 8.7 Johnson & Johnson (Ethicon Inc.)
 - 8.7.1 Business Overview
 - 8.7.2 Operating Segments
 - 8.7.3 Business Strategies
- 8.8 Medtronic plc
 - 8.8.1 Business Overview
 - 8.8.2 Operating Segments
 - 8.8.3 Business Strategies
- 8.9 Cardinal Health, Inc.
 - 8.9.1 Business Overview
 - 8.9.2 Operating Segments
 - 8.9.3 Business Strategy
- 8.10 3M Company
 - 8.10.1 Business Overview
 - 8.10.2 Operating Segments

- 8.10.3 Business Strategies
- 8.11 Zimmer Biomet Holdings, Inc.
 - 8.11.1 Business Overview
 - 8.11.2 Operating Segments
 - 8.11.3 Business Overview
- 8.12 PAUL HARTMANN AG
 - 8.12.1 Business Overview
 - 8.12.2 Operating Segments
- 8.13 MiMedx Group, Inc.
 - 8.13.1 Business Overview
 - 8.13.2 Business Strategy
- 8.14 Medline Industries, LP
 - 8.14.1 Business Overview
 - 8.14.2 Business Strategies
- 8.15 DeRoyal Industries, Inc.
 - 8.15.1 Business Overview

List Of Figures

LIST OF FIGURES

Figure 1: Key Components of Wound Care

Figure 2: Wound Care Segmentation

Figure 3: Global Wound Care Market by Value; 2020-2023 (US\$ Billion)

Figure 4: Global Wound Care Market by Value; 2024-2029 (US\$ Billion)

Figure 5: Global Wound Care Market by Product; 2023 (Percentage, %)

Figure 6: Global Wound Care Market by Application; 2023 (Percentage, %)

Figure 7: Global Wound Care Market by Mode of Purchase; 2023 (Percentage, %)

Figure 8: Global Wound Care Market by End Use; 2023 (Percentage, %)

Figure 9: Global Wound Care Market by Region; 2023 (Percentage, %)

Figure 10: Global Advanced Wound Care Market by Value; 2020-2023 (US\$ Billion)

Figure 11: Global Advanced Wound Care Market by Value; 2024-2029 (US\$ Billion)

Figure 12: Global Traditional Wound Care Market by Value; 2020-2023 (US\$ Billion)

Figure 13: Global Traditional Wound Care Market by Value; 2024-2029 (US\$ Billion)

Figure 14: Global Wound Care Therapy Devices Market by Value; 2020-2023 (US\$ Billion)

Figure 15: Global Wound Care Therapy Devices Market by Value; 2024-2029 (US\$ Billion)

Figure 16: Global Surgical Wound Care Market by Value; 2020-2023 (US\$ Billion)

Figure 17: Global Surgical Wound Care Market by Value; 2024-2029 (US\$ Billion)

Figure 18: Global Chronic Wound Care Market by Value; 2020-2023 (US\$ Billion)

Figure 19: Global Chronic Wound Care Market by Value; 2024-2029 (US\$ Billion)

Figure 20: Global Acute Wound Care Market by Value; 2020-2023 (US\$ Billion)

Figure 21: Global Acute Wound Care Market by Value; 2024-2029 (US\$ Billion)

Figure 22: Global Prescribed Wound Care Market by Value; 2020-2023 (US\$ Billion)

Figure 23: Global Prescribed Wound Care Market by Value; 2024-2029 (US\$ Billion)

Figure 24: Global non-prescribed (OTCs) Wound Care Market by Value; 2020-2023 (US\$ Billion)

Figure 25: Global non-prescribed (OTCs) Wound Care Market by Value; 2024-2029 (US\$ Billion)

Figure 26: Global Hospitals Wound Care Market by Value; 2020-2023 (US\$ Billion)

Figure 27: Global Hospitals Wound Care Market by Value; 2024-2029 (US\$ Billion)

Figure 28: Global Specialty Clinics Wound Care Market by Value; 2020-2023 (US\$ Billion)

Figure 29: Global Specialty Clinics Wound Care Market by Value; 2024-2029 (US\$ Billion)

Figure 30: Global Home Care Settings Wound Care Market by Value; 2020-2023 (US\$ Billion)

Figure 31: Global Home Care Settings Wound Care Market by Value; 2024-2029 (US\$ Billion)

Figure 32: Global Others Wound Care Market by Value; 2020-2023 (US\$ Billion)

Figure 33: Global Others Wound Care Market by Value; 2024-2029 (US\$ Billion)

Figure 34: North America Wound Care Market by Value; 2020-2023 (US\$ Billion)

Figure 35: North America Wound Care Market by Value; 2024-2029 (US\$ Billion)

Figure 36: North America Wound Care Market by Region; 2023 (Percentage, %)

Figure 37: The US Wound Care Market by Value; 2020-2023 (US\$ Billion)

Figure 38: The US Wound Care Market by Value; 2024-2029 (US\$ Billion)

Figure 39: The US Wound Care Market by Product; 2023 (Percentage, %)

Figure 40: The US Wound Care Market Product by Value; 2020-2023 (US\$ Billion)

Figure 41: The US Wound Care Market Product by Value; 2024-2029 (US\$ Billion)

Figure 42: Canada Wound Care Market by Value; 2020-2023 (US\$ Million)

Figure 43: Canada Wound Care Market by Value; 2024-2029 (US\$ Billion)

Figure 44: Mexico Wound Care Market by Value; 2020-2023 (US\$ Million)

Figure 45: Mexico Wound Care Market by Value; 2024-2029 (US\$ Million)

Figure 46: Europe Wound Care Market by Value; 2020-2023 (US\$ Billion)

Figure 47: Europe Wound Care Market by Value; 2024-2029 (US\$ Billion)

Figure 48: Europe Wound Care Market by Region; 2023 (Percentage, %)

Figure 49: Germany Wound Care Market by Value; 2020-2023 (US\$ Billion)

Figure 50: Germany Wound Care Market by Value; 2024-2029 (US\$ Billion)

Figure 51: UK Wound Care Market by Value; 2020-2023 (US\$ Million)

Figure 52: UK Wound Care Market by Value; 2024-2029 (US\$ Billion)

Figure 53: France Wound Care Market by Value; 2020-2023 (US\$ Million)

Figure 54: France Wound Care Market by Value; 2024-2029 (US\$ Million)

Figure 55: Italy Wound Care Market by Value; 2020-2023 (US\$ Million)

Figure 56: Italy Wound Care Market by Value; 2024-2029 (US\$ Million)

Figure 57: Spain Wound Care Market by Value; 2020-2023 (US\$ Million)

Figure 58: Spain Wound Care Market by Value; 2024-2029 (US\$ Million)

Figure 59: Rest of Europe Wound Care Market by Value; 2020-2023 (US\$ Billion)

Figure 60: Rest of Europe Wound Care Market by Value; 2024-2029 (US\$ Billion)

Figure 61: Asia Pacific Wound Care Market by Value; 2020-2023 (US\$ Billion)

Figure 62: Asia Pacific Wound Care Market by Value; 2024-2029 (US\$ Billion)

Figure 63: Asia Pacific Wound Care Market by Region; 2023 (Percentage, %)

Figure 64: China Wound Care Market by Value; 2020-2023 (US\$ Billion)

Figure 65: China Wound Care Market by Value; 2024-2029 (US\$ Billion)

Figure 66: Japan Wound Care Market by Value; 2020-2023 (US\$ Billion)

Figure 67: Japan Wound Care Market by Value; 2024-2029 (US\$ Billion)

Figure 68: India Wound Care Market by Value; 2020-2023 (US\$ Million)

Figure 69: India Wound Care Market by Value; 2024-2029 (US\$ Billion)

Figure 70: Rest of Asia Pacific Wound Care Market by Value; 2020-2023 (US\$ Billion)

Figure 71: Rest of Asia Pacific Wound Care Market by Value; 2024-2029 (US\$ Billion)

Figure 72: Latin America Wound Care Market by Value; 2020-2023 (US\$ Billion)

Figure 73: Latin America Wound Care Market by Value; 2024-2029 (US\$ Billion)

Figure 74: Middle East and Africa Wound Care Market by Value; 2020-2023 (US\$ Billion)

Figure 75: Middle East and Africa Wound Care Market by Value; 2024-2029 (US\$ Billion)

Figure 76: Global Percentage of Population Aged 65 Years or Over; 2022, 2030 & 2050 (Percentage, %)

Figure 77: Health Expenditure per capita by Countries; 2021 and 2022 (US\$ per capita)

Figure 78: Global Number of People with Diabetes (20-79 years); 2000-2045 (Million)

Figure 79: Smith & Nephew plc Revenue by Segment; 2023 (Percentage, %)

Figure 80: Baxter International Inc. Net Sales by Segments; 2023 (Percentage, %)

Figure 81: Integra LifeSciences Holdings Corporation Net Sales by Segment; 2023 (Percentage, %)

Figure 82: Convatec Group Plc, Revenue by Category; 2023 (Percentage, %)

Figure 83: Coloplast Group, Revenue by Segment; 2023 (Percentage, %)

Figure 84: M?Inlycke AB, Revenue by Segment; 2023 (Percentage, %)

Figure 85: Johnson & Johnson Sales by Business Segment; 2023 (Percentage, %)

Figure 86: Medtronic plc Net Sales by Segment: 2023 (Percentage, %)

Figure 87: Cardinal Health, Inc. Revenue by Segments; 2023 (Percentage, %)

Figure 88: 3M Sales by Segments; 2023 (Percentage, %)

Figure 89: Zimmer Biomet Holdings, Inc., Net Sales by Segment; 2023 (Percentage, %)

Figure 90: PAUL HARTMANN AG, Net Sales by Segment; 2023 (Percentage, %)

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