

# **Negative Pressure Wound Therapy Market Report by Device (Conventional NPWT Devices, Single-Use NPWT Devices, Accessories), Component (Canisters and Dressings, Pumps), Wound Type (Chronic Wounds, Acute Wounds), Indication (Surgical and Traumatic Wounds, Pressure Ulcers, Venous Ulcers, Diabetic Foot Ulcers, Burns, and Others), End-User (Hospitals and Clinics, Ambulatory Surgical Centers, Home Care Settings, and Others), and Region 2024-2032**

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## **Abstracts**

The global negative pressure wound therapy market size reached US\$ 2,791.0 Million in 2023. Looking forward, IMARC Group expects the market to reach US\$ 4,147.7 Million by 2032, exhibiting a growth rate (CAGR) of 4.4% during 2024-2032. The rising prevalence of chronic wounds and diabetes among the masses, the growing awareness among healthcare providers about the efficacy of NPWT in treating chronic and complicated wounds, and continuous technological advancements are among the key factors driving the market growth.

Negative pressure wound therapy (NPWT) is a medical treatment used to enhance the healing process of wounds. It involves the application of a vacuum pump, a foam dressing, and an adhesive film to draw out fluid and promote tissue growth. This technology serves as an effective option for treating various types of wounds including surgical incisions, pressure ulcers, and diabetic wounds. By creating a closed, suction environment around the wound, NPWT aids in reducing bacteria, maintaining a moist

setting, and drawing wound edges together. These conditions are conducive to faster healing and reduced infection risk. The vacuum pump is usually portable, allowing patients to continue daily activities with minimal inconvenience. Furthermore, it has become a standard approach in wound care management, offering a more efficient way to promote healing, reduce complications, and improve patients' quality of life.

The market is majorly driven by the increasing prevalence of chronic wounds and diabetes globally. Additionally, chronic conditions, such as diabetic foot ulcers, venous leg ulcers, and pressure ulcers often require prolonged treatment and specialized wound care, creating a sustained demand for effective therapies. Along with this, the growing awareness among healthcare providers about the efficacy of NPWT in treating chronic and complicated wounds is further driving the adoption of this technology, making it an essential component in wound care management protocols. In addition, the rising concern over hospital-acquired infections (HAIs) is another key driver for the growth of the negative pressure wound therapy (NPWT) market. Wounds treated in a hospital setting are susceptible to bacterial infections, which can prolong healing time and increase healthcare costs. Apart from this, the widespread adoption of NPWT as it can be adapted for various medical conditions that require accelerated healing and reduced risk of infection is providing a boost to the market. Moreover, the growing awareness of advanced wound care therapies is creating a positive market outlook.

#### Negative Pressure Wound Therapy Market Trends/Drivers:

##### Increasing Adoption in Homecare Settings

The NPWT industry is further propelled by its increasing adoption in homecare settings. With an aging population and a rising focus on reducing healthcare costs, home-based care has become a pivotal aspect of modern healthcare. NPWT devices have evolved to be more compact and user-friendly, making it feasible for patients to use them at home. This shift has the dual benefit of alleviating the burden on healthcare facilities while also providing patients with more comfortable and convenient treatment options. Home-based NPWT can be particularly beneficial for patients who live in remote locations and have limited access to specialized healthcare services. As the demand for home healthcare solutions continues to rise, the market for home-based NPWT systems is growing proportionally, contributing significantly to the overall market expansion.

##### Favorable Reimbursement Policies

Reimbursement policies also play a crucial role in driving the NPWT market. In many developed countries, NPWT is covered under medical insurance schemes, which

encourages healthcare providers to adopt this effective wound care management approach. This financial incentive is particularly vital for expensive treatments involving chronic conditions where the costs can quickly escalate. In addition, hospitals and healthcare providers are more inclined to opt for evidence-based treatments, including NPWT when reimbursement is guaranteed, as it assures that they can offer top-tier medical care without the associated financial constraints. As more countries adopt favorable reimbursement policies for advanced wound care technologies, the demand for NPWT is expected to increase, making it a mainstream treatment option in wound care management.

### Advancements in Technology and Product Innovation

Technological advancements and product innovations in the field of wound care have also been significant market drivers for NPWT. The industry has witnessed a rise in research and development activities aimed at enhancing the features, efficiency, and user-friendliness of NPWT devices. Additionally, newer versions of NPWT systems are more portable, easier to use, and offer advanced capabilities, including real-time wound monitoring. Some devices even incorporate telemedicine features, allowing healthcare providers to remotely assess the progress of wound healing. These innovations not only improve patient compliance but also extend the application of NPWT to homecare settings. This trend of product innovation and technological sophistication is expected to continue, drawing more healthcare facilities to adopt NPWT as a standard treatment option.

### Negative Pressure Wound Therapy Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global negative pressure wound therapy market report, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on device, component, wound type, indication and end-user.

#### Breakup by Device:

- Conventional NPWT Devices
- Single-Use NPWT Devices
- Accessories

Conventional NPWT devices hold the largest market share

The report has provided a detailed breakup and analysis of the market based on the

device. This includes conventional NPWT devices, single-use NPWT devices, and accessories. According to the report, conventional NPWT devices accounted for the largest market share.

Conventional negative pressure wound therapy (NPWT) devices continue to be integral in the wound care market, driven by their established effectiveness in treating a diverse range of wounds, from surgical incisions to chronic ulcers. It is cementing their role in clinical settings. This broad applicability makes them a go-to solution for healthcare providers dealing with complex wound care cases. Additionally, the robustness and reliability of these conventional systems make them suitable for hospital use, where skilled professionals can manage the therapy. Along with this, favorable reimbursement policies in many countries support the cost-effectiveness of using these devices, encouraging their adoption in healthcare facilities. Despite the emergence of portable and disposable NPWT options, the credibility and versatility of conventional systems maintain their significance in the market. As the focus on reducing wound-related complications and infections remains a priority, the role of conventional NPWT devices is driving their market growth.

#### Breakup by Component:

Canisters and Dressings

Pumps

Canisters and dressings account for the majority of the market share

A detailed breakup and analysis of the market based on the component has also been provided in the report. This includes canisters and dressings, and pumps. According to the report, canisters and dressings accounted for the largest market share.

In the negative pressure wound therapy (NPWT) industry, canisters and dressings are key components that significantly drive market growth. These components are essential for effectively administering NPWT, as they work in tandem to remove exudate and promote optimal wound healing conditions. Their indispensability generates a constant demand, especially since these are consumables that need regular replacement. Canisters and dressings have seen technological advancements, such as antimicrobial features and better absorbency, which make them more effective and user-friendly, encouraging higher adoption rates. These improvements have also expanded their applicability to various types of wounds, including complex and hard-to-treat cases. Additionally, the ease of integrating these advanced canisters and dressings with both

conventional and portable NPWT systems adds to their market appeal. As healthcare facilities aim to provide superior wound care while minimizing risks, including infections, the utilization of high-quality canisters and dressings becomes critical. This focus on quality and effectiveness ensures a steady market demand for these essential NPWT components.

#### Breakup by Wound Type:

Chronic Wounds

Acute Wounds

Chronic wounds hold the largest market share

The report has provided a detailed breakup and analysis of the market based on the wound type. This includes chronic wounds and acute wounds. According to the report, chronic wounds accounted for the largest market share.

Chronic wounds, such as diabetic ulcers, pressure ulcers, and venous leg ulcers, hold the largest market share in the market due to the cost-effectiveness of NPWT in treating chronic wounds over an extended period is an important factor. It minimizes the need for frequent dressing changes and reduces hospital stays, thereby lowering overall healthcare costs. Moreover, the prevalence of chronic conditions, including diabetes and obesity, which are leading causes of chronic wounds, is rising globally. This has resulted in an increasing number of patients requiring specialized wound care, thereby driving demand for effective treatment methods, such as NPWT.

#### Breakup by Indication:

Surgical and Traumatic Wounds

Pressure Ulcers

Venous Ulcers

Diabetic Foot Ulcers

Burns

Others

Surgical and traumatic wounds hold the largest market share

The report has provided a detailed breakup and analysis of the market based on the indication. This includes surgical and traumatic wounds, pressure ulcers, venous ulcers,

diabetic foot ulcers, burns, and others. According to the report, surgical and traumatic wounds accounted for the largest market share.

The demand for effective treatments for surgical and traumatic wounds is a notable market driver in the negative pressure wound therapy (NPWT) industry. Surgical wounds are an inevitable consequence of medical procedures, and their proper management is crucial to minimize post-operative complications, such as infections or dehiscence. Similarly, traumatic wounds resulting from accidents, burns, or other injuries require prompt and effective care to optimize healing and prevent complications. NPWT is increasingly being recognized as a reliable method for accelerating the healing of these wounds, as it helps to remove excess fluid, reduce bacterial load, and promote tissue regeneration. The therapy is particularly beneficial in complex surgical cases and severe trauma wounds, where rapid wound closure is crucial for patient recovery. As the number of surgical procedures and incidence of traumatic injuries continue to rise globally, the need for advanced wound care solutions mainly NPWT is growing. This growing demand underscores the importance of NPWT in the treatment of surgical and traumatic wounds, thereby driving market growth.

#### Breakup by End-User:

- Hospitals and Clinics
- Ambulatory Surgical Centers
- Home Care Settings
- Others

Hospitals and clinics account for the majority of the market share

A detailed breakup and analysis of the market based on the end-user has also been provided in the report. This includes hospitals and clinics, ambulatory surgical centers, home care settings, and others. According to the report, hospitals and clinics accounted for the largest market share.

The role of hospitals and clinics as primary end-users significantly propels the market growth in the negative pressure wound therapy (NPWT) industry. These healthcare settings often encounter a broad spectrum of wound types, ranging from surgical and traumatic wounds to chronic ulcers, necessitating effective and versatile wound care solutions. Additionally, the capability of these institutions to offer specialized care allows for the implementation of advanced therapies, and NPWT fits well into this ecosystem. In many countries, favorable reimbursement policies further incentivize hospitals and

clinics to adopt NPWT as a standard care protocol. Moreover, the increasing focus on reducing hospital-acquired infections and improving patient outcomes elevates the demand for evidence-based, efficient therapies such as NPWT. As healthcare systems continue to evolve, the emphasis on quality of care, patient safety, and cost-effectiveness reinforces the adoption of NPWT in hospitals and clinics. This enduring relationship between advanced wound care and institutional healthcare settings sustains the market demand for NPWT.

#### Breakup by Region:

North America

United States

Canada

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

North America exhibits a clear dominance, accounting for the largest negative pressure wound therapy market share

The market research report has also provided a comprehensive analysis of all the major



regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounted for the largest segment.

North America stands as a significant market for negative pressure wound therapy (NPWT), driven by the high prevalence of conditions, such as diabetes and obesity, which often lead to chronic wounds requiring advanced care. Coupled with an aging population, the need for effective wound management solutions, such as NPWT becomes even more pressing. Additionally, the healthcare infrastructure in the region is robust, featuring advanced medical technologies, including NPWT systems. A well-established reimbursement landscape also incentivizes healthcare providers to adopt efficient and evidence-based therapies.

Furthermore, the focus on reducing hospital-acquired infections and improving post-operative care adds to the demand for NPWT. The region also benefits from a strong culture of medical research and development, which continually refines and innovates NPWT technologies. As a result of these converging factors, North America remains a leading market for NPWT, with expectations for continued growth and adoption of this crucial wound care therapy.

#### Competitive Landscape:

The key players are continually investing in R&D to develop new products that are more efficient, user-friendly, and versatile. Recent innovations include portable NPWT devices, single-use systems, and devices equipped with telemedicine capabilities for remote monitoring. Along with this, companies often form partnerships, collaborations, and licensing agreements with other organizations. These partnerships may aim to combine complementary technologies or share distribution networks for wider market penetration. In addition, gaining regulatory approval for new devices or applications is crucial. Companies actively pursue certifications to validate the efficacy and safety of their products, which is acting as another growth-inducing factor. Apart from this, the escalating investments in educational and training programs for healthcare professionals are driving its adoption in clinical settings. Some companies opt for growth through the acquisition of smaller players or complementary businesses, creating a positive market outlook.

The market research report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been



provided. Some of the key players in the market include:

Acelity

Cardinal Health Inc.

Carilex Medical Inc.

ConvaTec Group PLC

Deroyal

Genadyne Biotechnologies Inc.

Lohmann & Rauscher International GmbH & Co. Kg

Medela

M?Inlycke Health Care AB (A Subsidiary of Investor AB)

Smith & Nephew

Talley Group

#### Recent Developments:

In August 2023, Medela revealed plans to introduce the new Invia Integrated Dressing, which is suitable for all types of wounds, as part of an expansion of its negative pressure wound therapy (NPWT) portfolio.

In May 2023, Smith & Nephew was awarded a contract for innovative technology by Vizient, Inc., the biggest member-driven organization in the country for healthcare performance improvement.

In April 2023, InfuSystem Holdings, Inc. declared a nationwide distribution contract with Genadyne Biotechnologies Inc. for its negative pressure wound treatment ("NPWT") equipment and supplies.

#### Key Questions Answered in This Report:

How has the negative pressure wound therapy market performed so far, and how will it perform in the coming years?

What are the drivers, restraints, and opportunities in the negative pressure wound therapy market?

What is the impact of each driver, restraint, and opportunity on the negative pressure wound therapy market?

What is the breakup of the market based on the device?

Which is the most attractive device in the negative pressure wound therapy market?

What is the breakup of the market based on the component?

Which is the most attractive component in the negative pressure wound therapy market?

What is the breakup of the market based on the wound type?

Which is the most attractive wound type in the negative pressure wound therapy

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What is the breakup of the market based on the indication?

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What is the breakup of the market based on the end-user?

Which is the most attractive end-user in the negative pressure wound therapy market?

What is the competitive structure of the negative pressure wound therapy market?

Who are the key players/companies in the negative pressure wound therapy market?

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