

Venous Leg Ulcer Market: Epidemiology, Industry Trends, Share, Size, Growth, Opportunity, and Forecast 2024-2034

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Abstracts

The 7 major venous leg ulcer markets reached a value of US\$ 2.1 Billion in 2023. Looking forward, IMARC Group expects the 7MM to reach US\$ 3.3 Billion by 2034, exhibiting a growth rate (CAGR) of 4.3% during 2024-2034.

The venous leg ulcer market has been comprehensively analyzed in IMARC's new report titled "Venous Leg Ulcer Market: Epidemiology, Industry Trends, Share, Size, Growth, Opportunity, and Forecast 2024-2034". Venous leg ulcer refers to an open wound that occurs on the lower leg, typically around the ankle or calf region, as a result of chronic venous insufficiency. These ulcers are usually characterized by shallow and irregular edges, which are surrounded by areas of discolored, reddish-brown skin. Individuals suffering from this disease may experience pain, aching, or a feeling of heaviness in the affected leg. Numerous other indications include swelling, itching, dryness, a yellowish or clear fluid that oozes from the wound, hardened skin, slow healing, etc. The diagnosis of a venous leg ulcer generally involves a comprehensive medical history evaluation, a clinical symptoms review, and a physical examination. In some cases, blood tests may be utilized to assess overall health or evaluate any underlying systemic diseases that may contribute to poor wound healing. The healthcare provider may also perform a Doppler ultrasound, which uses sound waves to examine blood flow in the veins and determine if the venous system is functioning properly. Furthermore, a biopsy is typically necessary to confirm the diagnosis of the ailment.

The increasing cases of weakened or damaged valves of the leg veins due to which blood can pool and accumulate in the veins, thereby leading to high pressure, are primarily driving the venous leg ulcer market. In addition to this, the rising incidences of

various associated risk factors, such as a history of deep vein thrombosis, obesity, older age, smoking, diabetes, a sedentary lifestyle, etc., are also creating a positive outlook for the market. Moreover, the widespread adoption of compression pump therapy, which utilizes a device that intermittently applies external pressure to the legs, promoting venous return and reducing edema, is further bolstering the market growth. Apart from this, the escalating demand for topical medications, including antimicrobial agents and analgesics, owing to their numerous benefits, like minimized trauma during dressing changes and lowered risk of infections, is acting as another significant growth-inducing factor. Additionally, the emerging popularity of negative pressure wound therapy that involves the application of a vacuum dressing over the wound to stimulate blood flow and promote granulation tissue formation is expected to drive the venous leg ulcer market during the forecast period.

IMARC Group's new report provides an exhaustive analysis of the venous leg ulcer market in the United States, EU4 (Germany, Spain, Italy, and France), United Kingdom, and Japan. This includes treatment practices, in-market, and pipeline drugs, share of individual therapies, market performance across the seven major markets, market performance of key companies and their drugs, etc. The report also provides the current and future patient pool across the seven major markets. According to the report, the United States has the largest patient pool for venous leg ulcer and also represents the largest market for its treatment. Furthermore, the current treatment practice/algorithm, market drivers, challenges, opportunities, reimbursement scenario, unmet medical needs, etc., have also been provided in the report. This report is a must-read for manufacturers, investors, business strategists, researchers, consultants, and all those who have any kind of stake or are planning to foray into the venous leg ulcer market in any manner.

Recent Developments

In March 2024, SolasCure Ltd. revealed the publication of its CLEANVLU Phase IIa clinical trial report in the International Wound Journal. The Phase IIa data confirm the efficacy and safety of Aurase Wound Gel in humans for wound healing via debridement and wound bed preparation.

In February 2024, MediWound Ltd. announced the results of head-to-head comparison analyses of EscharEx, a bromelain-based gel for chronic wounds, and collagenase SANTYL ointment, an FDA-approved treatment for chronic cutaneous ulcers, within the ChronEx phase II randomized controlled study. The findings indicate that EscharEx is superior to SANTYL in wound debridement, stimulation of granulation tissue, and duration to wound closure in patients with chronic venous leg ulcers.

In April 2023, MTF Biologics launched AlloPatch Pliable Meshed to its range of superior,

innovative, and effective wound care products. AlloPatch Pliable Meshed is an acellular human reticular dermal allograft intended to help repair difficult-to-treat lesions such as venous leg ulcers.

In March 2023, Sky Medical Technology disclosed the publication of its landmark multicenter randomized self-controlled trial, which compared the standard of care (SoC) with and without the company's Geko device in patients with difficult-to-heal venous leg ulcers. This research, in which patients served as their controls, found that patients treated with the Geko neuromuscular electrostimulation device healed more quickly than those treated with SoC alone.

Key Highlights:

Venous leg ulcers are a widespread, chronic, recurring ailment with an estimated frequency of 0.1% to 0.3% in the United Kingdom.

Venous leg ulcers are typically caused by venous reflux or blockage, but 20% of those with venous leg ulcers have arterial disease, either with or without venous problems.

Around 75% to 80% of total lower-extremity wounds are venous leg ulcers.

Over the age of 65, the prevalence of venous leg ulcers increased to 4%.

On average, 33-60% of venous leg ulcers persist for more than six weeks and are, therefore, known as chronic venous leg ulcers.

Every year, nearly 2 million people with venous leg ulcers are eligible for debridement in the United States alone.

Drugs:

EscharEx, a bioactive treatment for the debridement of chronic and several other difficult-to-heal wounds, is a product candidate in advanced development. It is designed to be applied topically to the wound bed over numerous 24-hour periods until the necrotic tissue is eliminated and the wound is debrided. EscharEx's mechanism of action is mediated by proteolytic enzymes, which break and eliminate necrotic tissue, preparing the wound bed for healing.

S42909 is a small molecule drug indicated in the treatment of venous lower limb ulcers. It exerts a potent NADPH oxidase inhibitor activity, along with vascular anti-inflammatory properties.

Time Period of the Study

Base Year: 2023

Historical Period: 2018-2023

Market Forecast: 2024-2034

Countries Covered

United States
Germany
France
United Kingdom
Italy
Spain
Japan

Analysis Covered Across Each Country

Historical, current, and future epidemiology scenario
Historical, current, and future performance of the venous leg ulcer market
Historical, current, and future performance of various therapeutic categories in the market
Sales of various drugs across the venous leg ulcer market
Reimbursement scenario in the market
In-market and pipeline drugs

Competitive Landscape:

This report also provides a detailed analysis of the current venous leg ulcer marketed drugs and late-stage pipeline drugs.

In-Market Drugs

Drug Overview
Mechanism of Action
Regulatory Status
Clinical Trial Results
Drug Uptake and Market Performance

Late-Stage Pipeline Drugs

Drug Overview
Mechanism of Action
Regulatory Status

Clinical Trial Results Drug Uptake and Market Performance

*Kindly note that the drugs in the above table only represent a partial list of marketed/pipeline drugs, and the complete list has been provided in the report.

Key Questions Answered in this Report: Market Insights

How has the venous leg ulcer market performed so far and how will it perform in the coming years?

What are the markets shares of various therapeutic segments in 2023 and how are they expected to perform till 2034?

What was the country-wise size of the venous leg ulcer market across the seven major markets in 2023 and what will it look like in 2034?

What is the growth rate of the venous leg ulcer market across the seven major markets and what will be the expected growth over the next ten years?

What are the key unmet needs in the market?

Epidemiology Insights

What is the number of prevalent cases (2018-2034) of venous leg ulcer across the seven major markets?

What is the number of prevalent cases (2018-2034) of venous leg ulcer by age across the seven major markets?

What is the number of prevalent cases (2018-2034) of venous leg ulcer by gender across the seven major markets?

How many patients are diagnosed (2018-2034) with venous leg ulcer across the seven major markets?

What is the size of the venous leg ulcer patient pool (2018-2023) across the seven major markets?

What would be the forecasted patient pool (2024-2034) across the seven major markets?

What are the key factors driving the epidemiological trend of venous leg ulcer?

What will be the growth rate of patients across the seven major markets?

Venous Leg Ulcer: Current Treatment Scenario, Marketed Drugs and Emerging Therapies

What are the current marketed drugs and what are their market performance?

What are the key pipeline drugs and how are they expected to perform in the coming years?

How safe are the current marketed drugs and what are their efficacies?

How safe are the late-stage pipeline drugs and what are their efficacies?

What are the current treatment guidelines for venous leg ulcer drugs across the seven major markets?

Who are the key companies in the market and what are their market shares?

What are the key mergers and acquisitions, licensing activities, collaborations, etc. related to the venous leg ulcer market?

What are the key regulatory events related to the venous leg ulcer market?

What is the structure of clinical trial landscape by status related to the venous leg ulcer market?

What is the structure of clinical trial landscape by phase related to the venous leg ulcer market?

What is the structure of clinical trial landscape by route of administration related to the venous leg ulcer market?

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