

Japan Wound Care Market Assessment, By Product [Advanced Wound Dressings, Surgical Wound Care, Traditional Wound Care, Wound Therapy Devices], By Applications [Chronic Wounds, Acute Wounds], Mode of Purchase [Prescribed, Non-prescribed], Distribution Channel [Institutional Sales, Retail Sales], By End-user [Hospitals, Outpatient Facilities, Home care, Research & Manufacturing], By Region, Opportunities and Forecast, FY2017-FY2031F

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Abstracts

Japan Wound Care Market size was valued at USD 1.61 billion in FY2023, and is expected to reach USD 2.39 billion in FY2031, with a CAGR of 5.1% for the forecast period between FY2024 and FY2031. The Japan wound care market is anticipated to grow, driven by factors such as the growing elderly demographic in Japan, a rising incidence of chronic diseases such as diabetes, and technological advancements. Given the elderly's susceptibility to skin issues and their need for specialized wound care, the rise in demographics is a significant concern.

According to the Ministry of Internal Affairs and Communications' population estimates, the number of individuals aged 65 and older increased by 60,000 in 2022, reaching a historical high of 36.27 million. An article published in the Journal of Nursing highlights how skin damage in the elderly, resulting from increased friction and shear forces, contributes to pressure ulcer development. Therefore, the growing elderly population is expected to be a contributing factor to the growth of the market. Furthermore, the implementation of updated wound care management protocols fosters greater unity in healthcare teams and is expected to boost market expansion. In April 2022, the

Japanese Society for Burn Injuries (JSBI) released the third iteration of guidelines for inpatient burn injury treatment in Japan. The initiative aims to establish a collective approach to burn care and promote new research to substantiate evidence-based burn care and treatment practices.

Increasing Prevalence of Diabetes

One of the most common outcomes of inadequately managed diabetes mellitus is the development of diabetic foot ulcers. These ulcers typically result from inadequate foot care, peripheral vascular disease, neuropathy, and poor glycemic control. As per data from the IDF Diabetes Atlas 2021, it indicates that an estimated 11.0 million individuals aged 20-79 in Japan had diabetes. Consequently, the substantial diabetes burden in the country elevates the risk of diabetic foot ulcers, necessitating effective wound care and likely contributing to market growth during the forecast period. Moreover, the substantial prevalence and occurrence of diabetic foot ulcers are projected to make the primary wound type, necessitating wound care management in the Japanese population. As per an article published in the Journal of Foot and Ankle Research, the incidence of diabetic foot ulcers in Japan was reported at 2.9 cases per 1000 people. This heightened risk of wound complications associated with diabetes is anticipated to stimulate the demand for wound care management devices in Japan.

Product Launch and Product Approvals

Japan wound care market has witnessed several notable product approvals and launches in recent months. Among these, innovative wound dressings with advanced materials and enhanced antimicrobial properties have gained regulatory approval. These cutting-edge solutions promise improved healing outcomes and infection prevention, addressing the growing need for effective wound management in Japan's aging population. Additionally, the introduction of smart wound care technologies, including connected devices and remote monitoring systems, has added a new dimension to patient care. These advancements signify a promising era of progress and improved patient outcomes in Japan wound care market.

In June 2021, MIMEDX Group, Inc. obtained regulatory clearance from the Japan MHLW (Ministry of Health, Labor and Welfare) for the introduction of EPIFIX in the Japanese market. EPIFIX received approval for the treatment of challenging-to-heal chronic wounds, notably diabetic foot ulcers. Its purpose is to safeguard the wound bed, promote granulation tissue formation, and provide a biocompatible human extracellular matrix. Consequently, the approval of novel products and their superior benefits are

contributing to the increased adoption of wound care solutions.

Collaborations Among Leading Industry Players

Japan wound care market has witnessed several collaborations among leading industry players, fostering innovation and advancements in Japan wound care market. The partnerships aim to address the growing demand for wound care solutions, driven by an aging population and rising incidence of chronic wounds. The collaborations include pharmaceutical companies collaborating with medical device manufacturers to develop integrated wound management systems. Furthermore, wound care product manufacturers often collaborate with research institutions and healthcare providers to conduct clinical trials and studies that enhance product efficacy and safety. These partnerships are accelerating the introduction of cutting-edge wound care technologies, like advanced dressings and regenerative therapies.

In January 2023, MiMedx Group, Inc. entered an exclusive distribution partnership with Gunze Medical Limited to market EPIFIX in Japan, providing a well-established treatment choice for individuals managing chronic wounds.

Impact of COVID-19

The COVID-19 pandemic significantly influenced market growth, primarily due to disruptions in wound care management. For Instance, a study published in the Journal of General Internal Medicine in May 2021 revealed a 61% reduction in diabetic foot care services in Japan during the pandemic. Consequently, the COVID-19 outbreak substantially impacted market growth during this period. Nevertheless, telemedicine services in the region have played a vital role in enabling patients to maintain their healthcare management, including wound care. After the pandemic, areas affected by the pandemic had considerably increased access to telehealth through mobile apps, facilitating improved healthcare management.

Key Players Landscape and Outlook

Japan, being an advanced nation with established trade connections with other developed countries, attracts numerous international participants to its wound care management market. Additionally, several domestic Japanese companies also operate in this sector. Consequently, the Japanese wound care management market has become highly competitive and diversified, boasting a multitude of players. Notable companies in this market landscape include Smith & Nephew, Medtronic, B. Braun SE,

3M, and Coloplast Group.

In April 2023, Gunze Medical, commenced the direct distribution of products such as artificial dermis marketed as PELNAC, wound dressings, and various other medical devices tailored for wound care within the Japanese market.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work

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