

Skin Substitutes Market Assessment, By Type [Biological, Synthetic, Biosynthetic], By Use [Temporary, Permanent], By Composition [Amnion, Cultured Epithelial Autograft, Acellular Allograft, Cellular Allograft, Xenografts, Composites, Synthetics], By Application [Acute Wounds, Chronic Wounds, Others], By End-user [Hospital, Specialty Clinics, Ambulatory Surgical Centers, Research Laboratory], By Region, Opportunities and Forecast, 2017-2031F

<https://marketpublishers.com/r/SCF2B893A470EN.html>

Date: March 2025

Pages: 228

Price: US\$ 4,500.00 (Single User License)

ID: SCF2B893A470EN

Abstracts

Global skin substitutes market size was valued at USD 356.63 million in 2023, which is expected to reach USD 681.26 million in 2031, with a CAGR of 8.43% for the forecast period between 2024 and 2031F. The main forces propelling the global skin substitutes market include the rising occurrence of chronic wounds, advancements in skin substitute technologies, a rise in burn and trauma cases, and expanding elderly demographic vulnerable to skin-related concerns. Moreover, the market's growth is augmented by the demand for aesthetic treatments and efforts to improve the well-being of individuals facing skin injuries.

The global skin substitutes market is gaining significant traction due to the increasing prevalence of chronic wounds, often linked to lifestyle-related ailments like diabetes and vascular diseases, necessitating innovative solutions for wound healing, thereby stimulating the demand for skin substitute products. Advancements in skin substitute technologies stand as another crucial factor. Ongoing research and development

endeavors have led to the development of more sophisticated and natural skin-mimicking substitutes. These advancements significantly enhance the efficacy of treating various wounds and injuries, thereby further boosting the growth of the global skin substitutes market.

Moreover, the global surge in burn and trauma cases has intensified the need for advanced wound care solutions, further fueling the demand for skin substitutes in the global skin substitutes market. Additionally, the growing elderly population, prone to skin-related issues such as pressure ulcers and chronic wounds, presents an expanding market for skin substitutes designed to address these concerns. Beyond medical necessities, there's a growing market for aesthetic treatments, where skin substitutes play a significant role. They are increasingly incorporated into cosmetic procedures to improve skin texture and appearance, catering to individuals seeking aesthetic improvements. In essence, the expansion of the global skin substitutes market is driven by medical requirements and collective emphasis on improving the quality of life for individuals dealing with skin injuries. It underscores the pivotal role of skin substitutes in augmenting well-being and aiding recovery.

Surge in Burn and Trauma Cases

The surge in global burn and trauma cases significantly propels the expansion of the global skin substitutes market. These incidents arise from various causes, such as accidents, industrial mishaps, conflicts, and natural calamities, necessitating advanced wound care solutions for diverse and severe skin injuries. In this context, skin substitutes serve a crucial role, offering innovative treatment avenues that accelerate wound healing, minimize infection risks, and mitigate scarring. The increasing demand for improved patient care has led to a widespread adoption of skin substitutes in medical settings, driving substantial market growth. The trend underscores the continual need for advancements in skin substitute technologies to cater to the evolving needs of individuals worldwide grappling with burns and traumatic injuries.

New Age Technologies

Advancements in technology, particularly the incorporation of 3D printing, profoundly impact the growth of the global skin substitutes market. Through 3D printing, intricate and adaptable skin substitutes, replicating natural skin qualities, can be crafted. The technological breakthrough transforms manufacturing methods by providing exact regulation over the substitute's makeup and design. These technological strides improve treatment effectiveness, accelerating healing processes, and decreasing

rejection probabilities. Hence, the integration of 3D printing technology propels the market forward, providing sophisticated, tailored solutions that address the varying requirements of individuals dealing with skin injuries or ailments. As an example, on December 8, 2023, Grupo Boticario from Brazil revealed the successful creation of 3D skin through bioprinting innovation. Termed a pioneering achievement globally, the initiative involves crafting a specific type of skin utilizing bioprinting technology. The technique involves blending cells with bioinks and biomaterials, followed by 3D printing to produce functional living tissue models.

Government Initiatives

Governments worldwide are proactively engaging in partnerships with private businesses to stimulate growth in the global skin substitutes market. These collaborations involve financing research and development, endorsing groundbreaking technologies, and optimizing regulatory processes for faster product clearance. Through these public-private alliances, governments seek to increase market strength by enabling resource accessibility, encouraging innovation, and advancing the availability of sophisticated skin substitute products. These strategic unions between governmental bodies and private sectors act as accelerators, driving skin substitutes' evolution and expansion to meet escalating healthcare and aesthetic needs. For example, India's Lovell Government Services and BioStem Technologies revealed in September 2023 that they have successfully enrolled BioStem on crucial government contract platforms. As a result, government clients got access to BioStem's assortment of placental-based tissue allografts for advanced wound care through various channels, including the Department of Defense's Distribution and Pricing Agreement (DAPA), the Department of Veterans Affairs Federal Supply Schedule (FSS), and the Defense Logistics Agency's ECAT system. This inclusion was facilitated by Lovell Government Services, BioStem's exclusive partner, and a Service-Disabled Veteran-Owned Small Business (SDVOSB).

Rising Demand for Cellular Allografts

The rising need for cellular allografts significantly propels the growth of the global skin substitutes market. These allografts, sourced from human tissues, provide a flexible remedy for diverse wound categories. Their distinct makeup, containing live cells and biological elements, expedite healing by prompting tissue renewal. The demand escalates as healthcare professionals increasingly acknowledge the effectiveness of cellular allografts in managing intricate wounds. The increased demand notably aids in expanding the skin substitutes market, driving innovation and creating sophisticated

cellular-based products to cater to the changing requirements of patients seeking wound care. For instance, in January 2023, Epifix, a placental tissue allograft manufactured by Purion, was introduced to the Japanese market by MiMedx Group, Inc., in collaboration with Gunze Medical. With more than 300 regulatory proteins, Epifix provides a human biocompatible extracellular matrix and functions as a barrier to protect wounds from healing. The partnership aims to increase revenue, broaden the company's customer base, and increase its geographic reach.

Treatment of Chronic Diseases

The extensive adoption of skin substitutes to treat chronic diseases notably drives the global skin substitutes market. These alternatives offer effective remedies for conditions such as diabetic ulcers and venous insufficiency ulcers. By facilitating wound closure and creating an environment conducive to tissue regeneration, they accelerate the healing process. As their effectiveness in managing chronic wounds gains wider acknowledgment, the demand for these substitutes increases significantly. The amplified utilization expands the market and spur ongoing innovation, encouraging the creation of highly specialized and advanced skin substitute products customized to cater to the specific requirements of patients with chronic conditions. For instance, during April 2023, Kerecis, a medical company specializing in fish skin, introduced the MariGen Shield. The innovation merges the company's fish-skin graft with a silicone contact layer to address chronic and intricate wounds. The new product features fenestrations that facilitate the proper drainage of wounds, establishing an optimal environment for wound care. Moreover, it maintains ideal moisture levels essential for fostering efficient healing processes.

Future Market Scenario

The prospects of global skin substitutes market showcase exceptional promise and dynamism. The positive outlook stems from various contributing factors. Ongoing technological advancements continue to transform the sector by introducing novel materials and manufacturing methods, like bioprinting and refined formulations, that better emulate natural skin properties. These advancements enable the creation of more efficient, tailor-made skin substitutes that cater to diverse patient requirements. Additionally, the increasing prevalence of chronic illnesses and injuries globally bodes well for market expansion. With aging populations and a rise in chronic wound cases, there's a growing demand for advanced wound care solutions, further stimulating the market growth. Moreover, collaborative initiatives involving governments, research institutions, and private entities drive constant innovation and regulatory support,

hastening product advancements and market reach. In essence, the amalgamation of technological progress, expanding healthcare needs, and collaborative initiatives sets a promising stage for the global skin substitutes market, offering a positive outlook for improved wound treatment and better patient outcomes.

Key Players Landscape and Outlook

Prominent companies in the global skin substitutes market actively engage in mergers and acquisitions to strengthen their competitive advantage and broaden their market footprint. Through strategic consolidation, these leading firms strive to harness synergies, expand their range of products, and gain access to new technologies or unique solutions. By acquiring businesses that complement their operations or merging with compatible entities, the companies aim to boost their research capabilities, streamline production processes, and enter untapped markets. The strategic moves empower these major players to pool resources, take advantage of economies of scale, and ultimately deliver innovative, high-quality skin substitutes, solidifying their standing as leaders in the industry. For example, in July 2023, Coloplast, a Danish medical products company, disclosed its intention to purchase Kerecis, an Icelandic biologics wound-care company renowned for utilizing fish skins in wound healing. The agreement, valued at a potential sum of USD 1.3 billion, includes an initial cash payment of USD 1.2 billion. Coloplast highlighted in a statement that this acquisition is set to bolster its position in the wound-care industry, particularly by establishing a foothold in the United States market segment.

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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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