

Global Dermal Grafts Market: Market Estimation, Dynamics, Regional Share, Trends, Competitor Analysis 2012-2016 and Forecast 2017-2023

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Abstracts

Dermal grafting is the procedure in which the part of the skin is replaced with the skin from other parts of the body. A dermal graft is used to replace damaged or missing skin or to provide a temporary wound covering. Dermal grafting is performed or recommended for skin infections, injury, deep burns, skin cancer, pressure ulcers and reconstructive surgeries. There are two types of skin grafts Viz. the split-level thickness and full thickness. Split-level thickness includes removal of dermal and epidermal layers of the skin and full-thickness grafts involve removal of muscles and blood vessels. Patients with deeper tissue loss need a full-thickness skin graft to cover the wound. This requires an entire thickness of skin from the donor site, not just the top two layers.

Dermal grafts market is driven by rise in the incidence of burns, accidents and surgeries requiring removal of skin. In addition factors such as skin loss due to cancer and infection are boosting the demand for dermal grafts. According to Skin Cancer Foundation, each year over 5.4 Mn cases of non-melanoma skin cancer are reported and over 3.3 Mn people are treated for the same in the U.S. Furthermore, technological advances in dermatomes such as electric and air dermatomes, increased accuracy and control by using exchangeable blades are the factors expected to bolster skin grafts market over the forecast period. However, complications of dermal grafts such as infection, pain, high cost of the procedure, and tissue rejection are some of the factors hindering the growth of the global dermal grafts market.

Dermal grafts market segmented on the basis of equipment, graft type, thickness, application, equipment and end-user

Based on equipment, skin grafts market is segmented into

Dermatomes

Knives Dermatomes

Electric Dermatomes

General Surgical Instruments

Consumables

Air Dermatomes

Based on graft type, dermal grafts market segmented into

Autologous

Isogenic

Allogeneic

Xenogeneic

Prosthetic

Based on thickness, dermal grafts market is segmented into

Split Thickness

Full Thickness

Composite Graft

Based on application, dermal grafts market is segmented into

Burns

Extensive Wound

Skin Cancer

Infection

Others

Based on end-user, dermal grafts market is segmented into

Hospitals

Dermatology Clinics

Ambulatory Surgical Centers

Considering the several factors that are impacting the growth of dermal grafts, the dermal grafts market is expected to grow at significant CAGR. According to WHO, over 96% of the fatal fire-related deaths have occurred in the low and middle-income countries whereas in the high-income countries have less likely deaths due to burns. Global issues such as fire accidents and burns have a major impact on growth of dermal grafts market over the forecast period. Market is mainly driven by increasing adoption of the dermal grafts globally due to increasing socioeconomic status. Development of health care accessibility and infrastructure expected to fuel the hospital end user segment in the global skin grafts market. Market players globally adopting innovation in grafting technologies to increase their market share. In addition, acquisitions, mergers are key strategies adopted by market players. For instance, in August 2016, Mallinckrodt plc., a leading speciality pharmaceutical company, acquired Stratatech Corporation, a privately held regenerative medicine company focused on the development of unique, proprietary skin substitute products, such as stratagrafts regenerative skin tissue and a technology platform for genetically enhanced skin tissues. Similarly, in 2014, Organogenesis Inc., a commercial leader in the field of regenerative medicine has acquired the Dermagraft assets (human fibroblast-derived dermal substitute) from Shire plc.

Geographically, dermal grafts market has been segmented into following regions viz. North America, Europe, Asia-Pacific, Latin America, and Middle East & Africa. North

America accounts for the significant market share owing to favourable reimbursement policies and higher healthcare expenditure. Adaptation of new technologies and increased skin related diseases are boosting the North America dermal grafts market. Europe dermal grafts market driven by large disposable income and rising awareness of newer technologies in dermal grafting among key stakeholders. Asia Pacific region is projected to have the fastest growth and is expected to lead by growing economies such as India and China. The Middle East & Africa market is led by the gulf nations particularly Saudi Arabia and UAE. The regions of Africa are expected to show minimal growth rate due to poor healthcare infrastructure and market penetration.

Some of the players in dermal grafts market include Organogenesis, Inc. (U.S.), Stratatech Corp. (U.S), Avita Medical (U.K.), ConvaTec Group plc. (U.K.), Coloplast (Denmark), B. Braun Holding GmbH & Co. KG (B.Braun Melsungen AG) (Germany), Medtronic (Stratatech Corporation) (U.S.), Zimmer Biomet. (U.S.), Novag AG (Switzerland), Tissue Regenix Group PLC (U.K), and Allergan Plc (Ireland)

In February 2017, Allergan plc, acquired LifeCell Corporation, a leading regenerative medicine company. LifeCell Corporation portfolio include, alloderm, a human allograft tissue matrix used in breast reconstruction post-mastectomy, and revolve, a single use high-volume fat grafting device used in plastic and reconstructive procedures. Additionally, LifeCell markets strattice, porcine based tissue matrix used in complex abdominal wall repair and for the surgical repair of damaged or ruptured soft tissue.

In January 2016, Integra LifeSciences Corporation's omnigraft dermal regeneration matrix received new indication from the U.S. Food and Drug Administration (U.S. FDA) to treat certain diabetic foot ulcers

REPORT OUTLINE:

The report provides granular level information about the market size, regional market share and forecast from 2017-2023

The report covers in-detail insights about the competitor's overview, key findings and their key strategies

The report outlines drivers, restraints, challenges, and trends that are currently faced by the industry

The report tracks recent innovations, key developments and startup's details

that are working in the industry

The report provides plethora of information about market entry strategies, regulatory framework and reimbursement scenario

Contents

1. EXECUTIVE SUMMARY

2. GLOBAL DERMAL GRAFTS MARKET INTRODUCTION

2.1. Global Dermal Grafts Market– Taxonomy

2.2. Global Dermal Grafts Market–Definitions

2.2.1. Equipment Type

2.2.2. Application

3. GLOBAL DERMAL GRAFTS MARKET DYNAMICS

3.1. Drivers

3.2. Restraints

3.3. Opportunities/Unmet Needs of the Market

3.4. Trends

3.5. Global Dermal Grafts Market Dynamics – Factors Impact Analysis

3.6. Global Dermal Grafts Market– Recent Market Introductions

4. GLOBAL DERMAL GRAFTS MARKET ANALYSIS, 2012 - 2016 AND FORECAST, 2017 – 2023

4.1. Market Analysis, 2012 – 2016 and Forecast, 2017 – 2023 (Revenue, USD Mn)

4.2. Year-over-Year (Y-o-Y) Growth Analysis (%)

4.3. Market Opportunity Analysis

5. GLOBAL DERMAL GRAFTS MARKET FORECAST, BY EQUIPMENT TYPE, 2012 - 2016 AND FORECAST, 2017 - 2023

5.1. Knives Dermatomes

5.1.1. Market Analysis, 2012 – 2016 and Forecast, 2017 – 2023 (Revenue, USD Mn)

5.1.2. Year-over-Year (Y-o-Y) Growth Analysis (%) and Market Share Analysis (%)

5.1.3. Market Opportunity Analysis

5.2. Electric Dermatomes

5.2.1. Market Analysis, 2012 – 2016 and Forecast, 2017 – 2023 (Revenue, USD Mn)

5.2.2. Year-over-Year (Y-o-Y) Growth Analysis (%) and Market Share Analysis (%)

5.2.3. Market Opportunity Analysis

5.3. General Surgical Instruments

- 5.3.1. Market Analysis, 2012 – 2016 and Forecast, 2017 – 2023 (Revenue, USD Mn)
- 5.3.2. Year-over-Year (Y-o-Y) Growth Analysis (%) and Market Share Analysis (%)
- 5.3.3. Market Opportunity Analysis

5.4. Consumables

- 5.4.1. Market Analysis, 2012 – 2016 and Forecast, 2017 – 2023 (Revenue, USD Mn)
- 5.4.2. Year-over-Year (Y-o-Y) Growth Analysis (%) and Market Share Analysis (%)
- 5.4.3. Market Opportunity Analysis

5.5. Air Dermatomes

- 5.5.1. Market Analysis, 2012 – 2016 and Forecast, 2017 – 2023 (Revenue, USD Mn)
- 5.5.2. Year-over-Year (Y-o-Y) Growth Analysis (%) and Market Share Analysis (%)
- 5.5.3. Market Opportunity Analysis

6. GLOBAL DERMAL GRAFTS MARKET FORECAST, BY GRAFT TYPE, 2012 - 2016 AND FORECAST, 2017 - 2023

6.1. Autologous

- 6.1.1. Market Analysis, 2012 – 2016 and Forecast, 2017 – 2023 (Revenue, USD Mn)
- 6.1.2. Year-over-Year (Y-o-Y) Growth Analysis (%) and Market Share Analysis (%)
- 6.1.3. Market Opportunity Analysis

6.2. Isogenic

- 6.2.1. Market Analysis, 2012 – 2016 and Forecast, 2017 – 2023 (Revenue, USD Mn)
- 6.2.2. Year-over-Year (Y-o-Y) Growth Analysis (%) and Market Share Analysis (%)
- 6.2.3. Market Opportunity Analysis

6.3. Allogeneic

- 6.3.1. Market Analysis, 2012 – 2016 and Forecast, 2017 – 2023 (Revenue, USD Mn)
- 6.3.2. Year-over-Year (Y-o-Y) Growth Analysis (%) and Market Share Analysis (%)
- 6.3.3. Market Opportunity Analysis

6.4. Xenogeneic

- 6.4.1. Market Analysis, 2012 – 2016 and Forecast, 2017 – 2023 (Revenue, USD Mn)
- 6.4.2. Year-over-Year (Y-o-Y) Growth Analysis (%) and Market Share Analysis (%)
- 6.4.3. Market Opportunity Analysis

6.5. Prosthetic

- 6.5.1. Market Analysis, 2012 – 2016 and Forecast, 2017 – 2023 (Revenue, USD Mn)
- 6.5.2. Year-over-Year (Y-o-Y) Growth Analysis (%) and Market Share Analysis (%)
- 6.5.3. Market Opportunity Analysis

7. GLOBAL DERMAL GRAFTS MARKET FORECAST, BY THICKNESS, 2012 - 2016 AND FORECAST, 2017 - 2023

7.1. Split Thickness

- 7.1.1. Market Analysis, 2012 – 2016 and Forecast, 2017 – 2023 (Revenue, USD Mn)
- 7.1.2. Year-over-Year (Y-o-Y) Growth Analysis (%) and Market Share Analysis (%)
- 7.1.3. Market Opportunity Analysis

7.2. Full Thickness

- 7.2.1. Market Analysis, 2012 – 2016 and Forecast, 2017 – 2023 (Revenue, USD Mn)
- 7.2.2. Year-over-Year (Y-o-Y) Growth Analysis (%) and Market Share Analysis (%)
- 7.2.3. Market Opportunity Analysis

7.3. Composite Graft

- 7.3.1. Market Analysis, 2012 – 2016 and Forecast, 2017 – 2023 (Revenue, USD Mn)
- 7.3.2. Year-over-Year (Y-o-Y) Growth Analysis (%) and Market Share Analysis (%)
- 7.3.3. Market Opportunity Analysis

8. GLOBAL DERMAL GRAFTS MARKET FORECAST, BY APPLICATION, 2012 - 2016 AND FORECAST, 2017 - 2023

8.1. Burns

- 8.1.1. Market Analysis, 2012 – 2016 and Forecast, 2017 – 2023 (Revenue, USD Mn)
- 8.1.2. Year-over-Year (Y-o-Y) Growth Analysis (%) and Market Share Analysis (%)
- 8.1.3. Market Opportunity Analysis

8.2. Extensive Wound

- 8.2.1. Market Analysis, 2012 – 2016 and Forecast, 2017 – 2023 (Revenue, USD Mn)
- 8.2.2. Year-over-Year (Y-o-Y) Growth Analysis (%) and Market Share Analysis (%)
- 8.2.3. Market Opportunity Analysis

8.3. Skin Cancer

- 8.3.1. Market Analysis, 2012 – 2016 and Forecast, 2017 – 2023 (Revenue, USD Mn)
- 8.3.2. Year-over-Year (Y-o-Y) Growth Analysis (%) and Market Share Analysis (%)
- 8.3.3. Market Opportunity Analysis

8.4. Infection

- 8.4.1. Market Analysis, 2012 – 2016 and Forecast, 2017 – 2023 (Revenue, USD Mn)
- 8.4.2. Year-over-Year (Y-o-Y) Growth Analysis (%) and Market Share Analysis (%)
- 8.4.3. Market Opportunity Analysis

8.5. Others

- 8.5.1. Market Analysis, 2012 – 2016 and Forecast, 2017 – 2023 (Revenue, USD Mn)
- 8.5.2. Year-over-Year (Y-o-Y) Growth Analysis (%) and Market Share Analysis (%)
- 8.5.3. Market Opportunity Analysis

9. GLOBAL DERMAL GRAFTS MARKET FORECAST, BY END USER, 2012 - 2016 AND FORECAST, 2017 - 2023

9.1. Hospitals

9.1.1. Market Analysis, 2012 – 2016 and Forecast, 2017 – 2023 (Revenue, USD Mn)

9.1.2. Year-over-Year (Y-o-Y) Growth Analysis (%) and Market Share Analysis (%)

9.1.3. Market Opportunity Analysis

9.2. Dermatology Clinics

9.2.1. Market Analysis, 2012 – 2016 and Forecast, 2017 – 2023 (Revenue, USD Mn)

9.2.2. Year-over-Year (Y-o-Y) Growth Analysis (%) and Market Share Analysis (%)

9.2.3. Market Opportunity Analysis

9.3. Ambulatory Surgical Centers

9.3.1. Market Analysis, 2012 – 2016 and Forecast, 2017 – 2023 (Revenue, USD Mn)

9.3.2. Year-over-Year (Y-o-Y) Growth Analysis (%) and Market Share Analysis (%)

9.3.3. Market Opportunity Analysis

10. GLOBAL DERMAL GRAFTS MARKET FORECAST, BY REGION, 2012 - 2016 AND FORECAST, 2017 - 2023

10.1. North America

10.1.1. Market Analysis, 2012 – 2016 and Forecast, 2017 – 2023 (Revenue, USD Mn)

10.1.2. Year-over-Year (Y-o-Y) Growth Analysis (%) and Market Share Analysis (%)

10.1.3. Market Opportunity Analysis

10.2. Europe

10.2.1. Market Analysis, 2012 – 2016 and Forecast, 2017 – 2023 (Revenue, USD Mn)

10.2.2. Year-over-Year (Y-o-Y) Growth Analysis (%) and Market Share Analysis (%)

10.2.3. Market Opportunity Analysis

10.3. Asia-Pacific

10.3.1. Market Analysis, 2012 – 2016 and Forecast, 2017 – 2023 (Revenue, USD Mn)

10.3.2. Year-over-Year (Y-o-Y) Growth Analysis (%) and Market Share Analysis (%)

10.3.3. Market Opportunity Analysis

10.4. Latin America

10.4.1. Market Analysis, 2012 – 2016 and Forecast, 2017 – 2023 (Revenue, USD Mn)

10.4.2. Year-over-Year (Y-o-Y) Growth Analysis (%) and Market Share Analysis (%)

10.4.3. Market Opportunity Analysis

10.5. Middle East and Africa

10.5.1. Market Analysis, 2012 – 2016 and Forecast, 2017 – 2023 (Revenue, USD Mn)

10.5.2. Year-over-Year (Y-o-Y) Growth Analysis (%) and Market Share Analysis (%)

10.5.3. Market Opportunity Analysis

10.6. Global Dermal Grafts Market- Opportunity Analysis Index - By Equipment Type, By Application, By Thickness, By Graft Type, By End User, and Region, 2017 – 2023

11. NORTH AMERICA DERMAL GRAFTS MARKET ANALYSIS, 2012 - 2016 AND FORECAST, 2017 - 2023

11.1.1. Equipment Type Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%) and Market Share (%)

11.1.1.1. Knives Dermatomes

11.1.1.2. Electric Dermatomes

11.1.1.3. General Surgical Instruments

11.1.1.4. Consumables

11.1.1.5. Air Dermatomes

11.1.2. Graft Type Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%) and Market Share (%)

11.1.2.1. Autologous

11.1.2.2. Isogenic

11.1.2.3. Allogeneic

11.1.2.4. Xenogeneic

11.1.2.5. Prosthetic

11.1.3. Thickness Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%) and Market Share (%)

11.1.3.1. Split Thickness

11.1.3.2. Full Thickness

11.1.3.3. Composite Graft

11.1.4. Application Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%) and Market Share (%)

11.1.4.1. Burns

11.1.4.2. Extensive Wound

11.1.4.3. Skin Cancer

11.1.4.4. Infection

11.1.4.5. Others

11.1.5. End User Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%) and Market Share (%)

11.1.5.1. Hospitals

11.1.5.2. Dermatology Clinics

11.1.5.3. Ambulatory Surgical Centers

11.1.6. Country Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn) Y-o-Y Growth (%) and Market Share (%)

11.1.6.1. U.S.

11.1.6.2. Canada

11.1.7. North America Dermal Grafts Market- Opportunity Analysis Index - By Equipment Type, By Application, By Thickness, By Graft Type, By End User, and Country, 2017 – 2023

11.1.8. North America Dermal Grafts Market Dynamics – Trends

12. EUROPE DERMAL GRAFTS MARKET ANALYSIS, 2012 - 2016 AND FORECAST, 2017 - 2023

12.1.1. Equipment Type Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%) and Market Share (%)

12.1.1.1. Knives Dermatomes

12.1.1.2. Electric Dermatomes

12.1.1.3. General Surgical Instruments

12.1.1.4. Consumables

12.1.1.5. Air Dermatomes

12.1.2. Graft Type Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%) and Market Share (%)

12.1.2.1. Autologous

12.1.2.2. Isogenic

12.1.2.3. Allogeneic

12.1.2.4. Xenogeneic

12.1.2.5. Prosthetic

12.1.3. Thickness Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%) and Market Share (%)

12.1.3.1. Split Thickness

12.1.3.2. Full Thickness

12.1.3.3. Composite Graft

12.1.4. Application Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%) and Market Share (%)

12.1.4.1. Burns

12.1.4.2. Extensive Wound

12.1.4.3. Skin Cancer

12.1.4.4. Infection

12.1.4.5. Others

12.1.5. End User Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%) and Market Share (%)

12.1.5.1. Hospitals

12.1.5.2. Dermatology Clinics

12.1.5.3. Ambulatory Surgical Centers

12.1.6. Country Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%) and Market Share (%)

12.1.6.1. Germany

12.1.6.2. UK

12.1.6.3. France

12.1.6.4. Spain

12.1.6.5. Italy

12.1.6.6. Russia

12.1.6.7. Poland

12.1.6.8. Rest of Europe

12.1.7. Europe Dermal Grafts Market- Opportunity Analysis Index - By Equipment Type, By Application, By Thickness, By Graft Type, By End User, and Country, 2017 – 2023

12.1.8. Europe Dermal Grafts Market Dynamics – Trends

13. ASIA-PACIFIC DERMAL GRAFTS MARKET ANALYSIS, 2012 - 2016 AND FORECAST, 2017 - 2023

13.1.1. Equipment Type Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%) and Market Share (%)

13.1.1.1. Knives Dermatomes

13.1.1.2. Electric Dermatomes

13.1.1.3. General Surgical Instruments

13.1.1.4. Consumables

13.1.1.5. Air Dermatomes

13.1.2. Graft Type Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%) and Market Share (%)

13.1.2.1. Autologous

13.1.2.2. Isogenic

13.1.2.3. Allogeneic

13.1.2.4. Xenogeneic

13.1.2.5. Prosthetic

13.1.3. Thickness Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%) and Market Share (%)

13.1.3.1. Split Thickness

13.1.3.2. Full Thickness

13.1.3.3. Composite Graft

13.1.4. Application Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%) and Market Share (%)

13.1.4.1. Burns

13.1.4.2. Extensive Wound

13.1.4.3. Skin Cancer

13.1.4.4. Infection

13.1.4.5. Others

13.1.5. End User Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%) and Market Share (%)

13.1.5.1. Hospitals

13.1.5.2. Dermatology Clinics

13.1.5.3. Ambulatory Surgical Centers

13.1.6. Country Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%), and Market Share (%)

13.1.6.1. Japan

13.1.6.2. China

13.1.6.3. India

13.1.6.4. ASEAN

13.1.6.5. Australia & New Zealand

13.1.6.6. Rest of Asia-Pacific

13.1.7. Asia-Pacific Dermal Grafts Market- Opportunity Analysis Index - By Equipment Type, By Application, By Thickness, By Graft Type, By End User, and Country, 2017 – 2023

13.1.8. Asia-Pacific Dermal Grafts Market Dynamics – Trends

14. LATIN AMERICA DERMAL GRAFTS MARKET ANALYSIS, 2012 - 2016 AND FORECAST, 2017 - 2023

14.1.1. Equipment Type Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%) and Market Share (%)

14.1.1.1. Knives Dermatomes

14.1.1.2. Electric Dermatomes

14.1.1.3. General Surgical Instruments

14.1.1.4. Consumables

14.1.1.5. Air Dermatomes

14.1.2. Graft Type Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%) and Market Share (%)

14.1.2.1. Autologous

14.1.2.2. Isogenic

14.1.2.3. Allogeneic

14.1.2.4. Xenogeneic

14.1.2.5. Prosthetic

14.1.3. Thickness Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%) and Market Share (%)

14.1.3.1. Split Thickness

14.1.3.2. Full Thickness

14.1.3.3. Composite Graft

14.1.4. Application Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%) and Market Share (%)

14.1.4.1. Burns

14.1.4.2. Extensive Wound

14.1.4.3. Skin Cancer

14.1.4.4. Infection

14.1.4.5. Others

14.1.5. End User Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%) and Market Share (%)

14.1.5.1. Hospitals

14.1.5.2. Dermatology Clinics

14.1.5.3. Ambulatory Surgical Centers

14.1.6. Country Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%) and Market Share (%)

14.1.6.1. Brazil

14.1.6.2. Mexico

14.1.6.3. Argentina

14.1.6.4. Venezuela

14.1.6.5. Rest of Latin America

14.1.7. Latin America Dermal Grafts Market- Opportunity Analysis Index - By Equipment Type, By Application, By Thickness, By Graft Type, By End User, and Country, 2017 – 2023

14.1.8. Latin America Dermal Grafts Market Dynamics – Trends

15. MIDDLE EAST & AFRICA DERMAL GRAFTS MARKET ANALYSIS, 2012 - 2016 AND FORECAST, 2017 - 2023

15.1.1. Equipment Type Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%) and Market Share (%)

15.1.1.1. Knives Dermatomes

15.1.1.2. Electric Dermatomes

15.1.1.3. General Surgical Instruments

- 15.1.1.4. Consumables
- 15.1.1.5. Air Dermatomes
- 15.1.2. Graft Type Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%) and Market Share (%)
 - 15.1.2.1. Autologous
 - 15.1.2.2. Isogenic
 - 15.1.2.3. Allogeneic
 - 15.1.2.4. Xenogeneic
 - 15.1.2.5. Prosthetic
- 15.1.3. Thickness Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%) and Market Share (%)
 - 15.1.3.1. Split Thickness
 - 15.1.3.2. Full Thickness
 - 15.1.3.3. Composite Graft
- 15.1.4. Application Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%) and Market Share (%)
 - 15.1.4.1. Burns
 - 15.1.4.2. Extensive Wound
 - 15.1.4.3. Skin Cancer
 - 15.1.4.4. Infection
 - 15.1.4.5. Others
- 15.1.5. End User Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%) and Market Share (%)
 - 15.1.5.1. Hospitals
 - 15.1.5.2. Dermatology Clinics
 - 15.1.5.3. Ambulatory Surgical Centers
- 15.1.6. Country Analysis (2012 – 2016) and Forecast (2017 – 2023) by Revenue (USD Mn), Y-o-Y Growth (%), and Market Share (%)
 - 15.1.6.1. Gulf Cooperation Council (GCC) Countries
 - 15.1.6.2. Israel
 - 15.1.6.3. South Africa
 - 15.1.6.4. Rest of MEA
- 15.1.7. MEA Dermal Grafts Market- Opportunity Analysis Index - By Equipment Type, By Application, By Thickness, By Graft Type, By End User, and Country, 2017 – 2023
- 15.1.8. MEA Dermal Grafts Market Dynamics – Trends

16. COMPETITION LANDSCAPE

16.1. Strategic Dashboard of Top Market Players

16.2. Company Profiles (Introduction, Financial Analysis, Drug & Service Offerings, Key Developments, Strategies, and SWOT Analysis)

- 16.2.1. Organogenesis, Inc. (U.S.)
- 16.2.2. Stratatech Corp. (U.S)
- 16.2.3. Avita Medical (U.K.)
- 16.2.4. ConvaTec Group plc. (U.K.)
- 16.2.5. Coloplast (Denmark)
- 16.2.6. B. Braun Holding GmbH & Co. KG (B.Braun Melsungen AG) (Germany)
- 16.2.7. Medtronic (Stratatech Corporation) (U.S.)
- 16.2.8. Zimmer Biomet. (U.S.)
- 16.2.9. Novag AG (Switzerland)
- 16.2.10. Tissue Regenix Group PLC (U.K)
- 16.2.11. Allergan Plc (Ireland)

17. RESEARCH METHODOLOGY

18. KEY ASSUMPTIONS AND ACRONYMS

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