

Surgical Dressing Market Forecasts to 2034 – Global Analysis By Product (Primary Dressing, Secondary Dressing and Other Products), By Application (Diabetes Based surgeries, Cardiovascular Disease, Ulcers, Burns, Transplant Sites and Other Applications), End User and By Geography

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Abstracts

According to Statistics MRC, the Global Surgical Dressing Market is accounted for \$6.3 billion in 2026 and is expected to reach \$11.4 billion by 2034 growing at a CAGR of 7.6% during the forecast period. Surgical dressing refers to sterile materials applied to wounds or incisions to promote healing and prevent infection. Comprising gauze, bandages, and adhesive strips, it serves to absorb exudates, protect the wound from contaminants, and maintain a conducive environment for recovery. Advantages include minimizing infection risks, supporting tissue repair, and providing comfort. Surgical dressings are crucial in postoperative care, injury treatment, and wound management.

According to the American Society of Plastic Surgeons, approximately 18 million people in the U.S. underwent minimally invasive cosmetic surgical procedures in 2018.

Market Dynamics:

Driver:

Rising incidence of chronic diseases

With an increasing incidence of conditions like diabetes and cardiovascular diseases, there's a heightened need for effective wound care and infection prevention.

Additionally, the growing aging population contributes to a higher number of surgeries, such as joint replacements and cardiac procedures. Surgical dressings play a pivotal role in postoperative care by providing a sterile barrier, minimizing infection risks, and promoting optimal wound healing. As healthcare systems globally address these challenges, the demand for advanced and efficient surgical dressing solutions continues to rise.

Restraint:

High cost of advanced products

Technologically advanced surgical dressings incorporating smart materials, antimicrobial agents, and sophisticated wound-healing technologies often come with a higher price tag. This poses a challenge to widespread adoption, particularly in healthcare systems with budget constraints and cost-conscious consumers. The economic burden on patients and healthcare providers limits the accessibility of these advanced solutions, hindering their adoption in favor of more cost-effective alternatives.

Opportunity:

Growing awareness of infection prevention

As healthcare awareness grows, there is a heightened emphasis on the importance of infection control in wound care. This awareness is driving demand for advanced surgical dressings with enhanced antimicrobial properties and infection-resistant features. Consumers and healthcare providers are actively seeking products that not only facilitate wound healing but also minimize the risk of infections. This trend opens doors for market players to introduce and promote innovative surgical dressing solutions, fostering a market environment where infection prevention is a key consideration. It also encourages the development of antimicrobial technologies, positioning the market to address evolving healthcare needs with effective and awareness-driven products.

Threat:

Supply chain disruptions

Factors such as geopolitical tensions, natural disasters, or global pandemics can disrupt the supply chain, leading to shortages of critical components for surgical dressings. These disruptions not only affect production timelines but also contribute to increased

costs and logistical challenges. The dependence on a global supply chain makes the market vulnerable to external factors beyond the control of manufacturers. To mitigate this threat, industry players must invest in resilient supply chain management strategies, diversify sourcing options, and establish contingency plans. Proactive measures are essential to ensure a stable supply of materials and maintain the uninterrupted availability of surgical dressings in the market, safeguarding against potential adverse impacts on patient care and healthcare infrastructure.

Covid-19 Impact:

The Covid-19 pandemic has significantly impacted the Surgical Dressing Market, leading to increased demand for wound care products in healthcare facilities globally. With a surge in hospitalizations and surgeries related to the virus, there has been a heightened need for sterile dressings and advanced wound care solutions. Additionally, the pandemic has accelerated the adoption of telemedicine, influencing the development of surgical dressings suitable for remote patient care. Supply chain disruptions, fluctuating healthcare priorities, and the strain on healthcare systems have further shaped the dynamics of the surgical dressing market during and post-Covid-19.

The secondary dressing segment is expected to be the largest during the forecast period

The secondary dressing segment is expected to have a lucrative growth. These dressings provide added protection, absorption of exudate, and support to the primary dressing, ensuring optimal wound healing conditions. Commonly used in complex wounds or to secure primary dressings, secondary dressings come in various forms, such as gauze, films, foams, or hydrocolloids. They contribute to maintaining a sterile environment, preventing infections, and promoting patient comfort. The versatility and adaptability of secondary dressings make them integral in comprehensive wound care protocols, catering to diverse patient needs and contributing to overall positive treatment outcomes.

The hospitals segment is expected to have the highest CAGR during the forecast period

The hospitals segment is anticipated to witness the fastest CAGR growth during the forecast period. Surgical dressings are integral in postoperative care, wound management, and infection prevention within hospital settings. The rising number of surgeries, coupled with a growing emphasis on infection control, propels the demand for advanced surgical dressing solutions. Hospitals prioritize the use of sterile and effective

dressings to ensure optimal patient outcomes. Moreover, ongoing collaborations between hospitals and surgical dressing manufacturers contribute to the development of innovative products, addressing the specific needs of healthcare professionals and patients in diverse medical scenarios.

Region with largest share:

During the forecast period, it is expected that the North American Surgical Dressing market will continue to hold a majority of the market share driven by a robust healthcare infrastructure, advanced medical technologies, and a high prevalence of chronic diseases requiring surgical interventions. The region's well-established regulatory framework ensures the quality and safety of surgical dressings, fostering trust among consumers. Additionally, a growing aging population contributes to an increased demand for postoperative care products. Ongoing technological innovations and the rising awareness of infection prevention further propel the market with a strong focus on healthcare and a supportive market ecosystem.

Region with highest CAGR:

Asia Pacific is projected to have the highest CAGR over the forecast period. The growing population, increasing healthcare expenditures, and rising awareness about advanced wound care solutions contribute to the market's expansion. In countries like China and India, a surge in surgical procedures, coupled with a higher prevalence of chronic diseases, fuels the demand for surgical dressings. The region also witnesses ongoing technological innovations in wound care products. With improving healthcare infrastructure and a focus on patient outcomes, Asia Pacific represents a key market for surgical dressing manufacturers, presenting opportunities for growth and market penetration.

Key players in the market

Some of the key players in Surgical Dressing market include 3M Company, B. Braun SE, Baxter, Smith and Nephew plc., Cardinal Health Inc., Organogenesis Holdings Inc., Coloplast Corp, Molnlycke Health Care AB, Convatec Group PLC, Derma Sciences Inc. (Integra LifeSciences), Essity Aktiebolag AB, Johnson & Johnson Private Limited and Medtronic.

Key Developments:

In August 2023, TE Connectivity announced the launch of its new line of hybrid fiber optic connectors.

In April 2023, the FDA clearance for 3M Health Care's 3M Veraflo Therapy, including 3M V.A.C. Veraflo Cleanse Choice Dressing, and 3M Veraflo Cleanse Choice Complete Dressing expanded the company's customer base and increased its revenue. This innovative approach for wound care offered improved treatment options, making it more attractive to healthcare providers and potentially boosting the company's financial performance.

In January 2023, Convatec announced the U.S. launch of ConvaFoam, a family of advanced foam dressings that can be used on a spectrum of wound types at any stage for wound management and skin protection.

In June 2022, Collagen Matrix received 510(k) clearance for a new fibrillar collagen wound dressing. The collagen matrix fibrillar collagen wound dressing is an absorbent microfibrillar matrix used to treat wounds that moderately to extensively exude fluid as well as control mild bleeding.

Products Covered:

Primary Dressing

Secondary Dressing

Other Products

Applications Covered:

Diabetes Based surgeries

Cardiovascular Disease

Ulcers

Burns

Transplant Sites

Other Applications

End Users Covered:

Hospitals

Specialty Clinics

Home Healthcare

Ambulatory Surgery Centers

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

Market share assessments for the regional and country-level segments

Strategic recommendations for the new entrants

Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

Strategic recommendations in key business segments based on the market estimations

Competitive landscaping mapping the key common trends

Company profiling with detailed strategies, financials, and recent developments

Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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