

# **Dupuytren's Disease Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Diagnosis (Physical Examination, X-ray), Treatment (Surgery, Radiation Therapy, Needle Aponeurotomy, Steroid Shot, Enzyme Injection, Occupational Therapy, Others)), By Disease Type (Type I, Type II, Type III), By End-use (Hospitals, Clinics, Academic & Research Institute, Others), By Region & Competition, 2021-2031F**

<https://marketpublishers.com/r/D72822BD3467EN.html>

Date: January 2026

Pages: 185

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

ID: D72822BD3467EN

## **Abstracts**

The Global Dupuytren's Disease Market is projected to expand from a valuation of USD 4.68 Billion in 2025 to USD 6.15 Billion by 2031, registering a Compound Annual Growth Rate (CAGR) of 4.66%. Dupuytren's disease is defined as a progressive connective tissue disorder involving the thickening of the palmar fascia, which results in the development of collagen nodules and cords that force fingers into permanent contracture. Market growth is primarily supported by an aging global population and the increasing prevalence of risk factors such as diabetes, both of which widen the target patient demographic. Additionally, a growing patient preference and availability of minimally invasive treatments have expanded the range of manageable cases. Data from the American Society of Plastic Surgeons indicates that 208,480 reconstructive hand surgeries were performed by member surgeons in 2024, highlighting the consistent and substantial demand for functional interventions, including those required for Dupuytren's contracture.

One significant obstacle potentially hindering market expansion is the high rate of disease recurrence linked to current treatment options. Whether patients choose

surgical fasciectomy or minimally invasive enzymatic injections, the absence of a permanent cure frequently leads to the need for repeat interventions, compounding the economic burden on both patients and payers. This issue regarding long-term efficacy, coupled with strict reimbursement policies often applied to high-cost biologic therapies, threatens to restrict the adoption of premium treatment solutions in cost-conscious healthcare markets.

## **Market Driver**

A primary engine for growth in the Global Dupuytren's Disease Market is the surge in research and development dedicated to novel therapeutics, driven by an urgent demand for non-surgical interventions with enhanced safety profiles. Biotechnology companies are actively progressing their clinical pipelines to introduce recombinant alternatives to existing collagenase therapies, with the goal of reducing reliance on invasive surgical procedures. For example, Connex announced in July 2024 that it had administered the first dose of CNT201 to patients in a Phase 1/2 clinical trial in Australia, representing a pivotal step toward validating a new genetically recombinant collagenase treatment. This intensification of R&D activity is expected to diversify the competitive landscape and broaden market access by developing treatments that offer superior efficacy or cost benefits compared to current biologics.

Simultaneously, the increasing global prevalence of the condition, particularly within aging demographics, is expanding the volume of patients necessitating long-term medical management. As life expectancy increases, the accumulation of genetic predispositions and lifestyle-related risks has led to a measurable rise in diagnosed cases in primary care settings, directly enlarging the addressable patient pool. A study published via medRxiv in July 2024 analyzed general practice registration data and identified an overall Dupuytren's disease prevalence of 1.99% in the population studied, with rates peaking significantly in older age groups. This growing patient base translates into substantial commercial demand for established pharmaceutical interventions, as evidenced by Endo, Inc., which reported total third-quarter revenues of \$128 million for its XIAFLEX franchise in November 2024, underscoring the significant economic scale fueled by this clinical need.

## **Market Challenge**

The high rate of disease recurrence remains a critical barrier impeding the sustainable growth of the Global Dupuytren's Disease Market. This clinical reality generates a cycle of repeat interventions that calls into question the long-term economic value of premium

treatment options. Insurance providers and payers are increasingly reluctant to authorize high-cost biologic therapies or minimally invasive procedures when the condition frequently returns, necessitating additional medical expenditures. Consequently, this skepticism results in stringent reimbursement criteria that favor traditional, lower-cost surgical methods over innovative but expensive pharmaceutical solutions, thereby limiting the revenue potential for manufacturers of novel therapeutics.

In 2024, the British Society for Surgery of the Hand highlighted this issue with comparative clinical data showing that patients treated with minimally invasive collagenase injections experienced a re-intervention rate of 14.6 percent within one year, whereas those undergoing surgical fasciectomy saw a significantly lower rate of 3.4 percent. This disparity in early efficacy reinforces the hesitation of cost-sensitive healthcare systems to broadly fund advanced non-surgical treatments, directly hampering the market share expansion of premium biological products.

## **Market Trends**

The increasing adoption of Percutaneous Needle Aponeurotomy (PNA) signifies a major shift toward minimally invasive, cost-effective interventions that prioritize rapid functional recovery over aggressive surgical excision. This trend is accelerating as clinicians seek repeatable outpatient procedures that minimize patient downtime and healthcare costs, especially for cases where traditional open surgery presents disproportionate risks. Recent clinical data supports the efficacy of refined needle techniques in restoring hand function without the extensive rehabilitation associated with fasciectomy. According to *Musculoskeletal Surgery* in January 2025, a study evaluating a modified PNA technique reported a mean contracture correction of 83 percent across affected digits, with a notably low short-term recurrence rate of 14.2 percent, positioning the procedure as a viable first-line treatment for preserving hand mechanics.

Concurrently, the market is observing the integration of adjuvant radiotherapy as a strategic modality to inhibit disease progression and address the challenge of high recurrence rates following primary interventions. This approach represents a move toward hybrid treatment models where radiotherapy is applied immediately after nodule disruption or limited release to deactivate fibroblasts and prevent the reforming of collagen cords. The focus is currently on establishing the safety profile of this combination to encourage broader payer coverage and clinical acceptance. As reported in the *Journal of Hand Surgery (European Volume)* in February 2025, a randomized controlled trial assessing the safety of adjuvant radiotherapy confirmed its tolerability, revealing that 89 percent of recorded adverse events were mild and self-limiting,

thereby supporting its role as a low-risk adjunct for long-term disease control.

## Key Market Players

Novartis AG

Pfizer Inc.

Bayer AG

Nantong Jinghua Pharmaceutical Co., Ltd

Actiza Pharmaceutical Private Limited

Endo International plc

Spear Pharmaceuticals

Hikma Pharmaceuticals PLC

Bristol-Myers Squibb

Glaxosmithkline PLC

## Report Scope

In this report, the Global Dupuytren's Disease Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Dupuytren's Disease Market, By Type

Diagnosis (Physical Examination, X-ray)

Treatment (Surgery, Radiation Therapy, Needle Aponeurotomy, Steroid Shot, Enzyme Injection, Occupational Therapy, Others)

Dupuytren's Disease Market, By Disease Type

Type I

Type II

Type III

#### Dupuytren's Disease Market, By End-use

Hospitals

Clinics

Academic & Research Institute

Others

#### Dupuytren's Disease Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

## Asia Pacific

China

India

Japan

Australia

South Korea

## South America

Brazil

Argentina

Colombia

## Middle East & Africa

South Africa

Saudi Arabia

UAE

## **Competitive Landscape**

Company Profiles: Detailed analysis of the major companies present in the Global Dupuytren's Disease Market.

## **Available Customizations:**

Global Dupuytren's Disease Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## Company Information

Detailed analysis and profiling of additional market players (up to five).

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