

Biomaterial Wound Dressing Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product (Alginate Dressing, Hydrocolloids, Skin Substitutes, Others), By Type (Primary and Secondary), By Application (Wounds, Burns, Ulcers, Others), By End User (Hospitals & Clinics, Ambulatory Surgical Centers, Homecare), By Region and Competition, 2019-2029F

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Abstracts

Global Biomaterial Wound Dressing Market was valued at USD 980.25 Million in 2023 and is anticipated to project steady growth in the forecast period with a CAGR of 8.64% through 2029. Biomaterials, such as collagen, alginates, and hydrogels, have been utilized for centuries to dress wounds and facilitate wound healing. These materials offer unique properties that contribute to their effectiveness, including their ability to maintain a moist or hydrated environment at the wound site, retain fluids within the wound, and provide protection against infection.

In recent decades, significant advancements in materials science and nanotechnology have revolutionized the field of wound dressings. This has led to the development of biodegradable and nonwoven wound dressings that not only meet the clinical requirements but also offer cost-effectiveness and convenience. These innovative biomaterials wound dressings (BWD) are designed to optimize the healing process by creating an ideal environment for tissue regeneration. By incorporating advanced biomaterials into wound care, healthcare professionals can enhance patient outcomes and contribute to faster and more efficient wound healing. The continuous development and refinement of biomaterial wound dressings hold great promise for the

future of wound care, offering improved therapeutic options and better quality of life for patients.

Key Market Drivers

Growing Burden of Chronic Wounds and Associated Diseases

The growing burden of chronic wounds and associated diseases is expected to significantly increase the demand for biomaterial wound dressings in the healthcare industry. Chronic wounds, such as diabetic foot ulcers, pressure ulcers, and venous leg ulcers, pose a substantial challenge to patients and healthcare systems worldwide. These wounds often resist conventional treatments and can lead to severe complications if not managed effectively.

Biomaterial wound dressings offer a promising solution to address this healthcare challenge. These dressings are designed with advanced materials that provide a conducive environment for wound healing, promote tissue regeneration, and minimize the risk of infection. The demand for these biomaterial wound dressings is expected to rise for several reasons. The prevalence of chronic diseases that contribute to chronic wounds, such as diabetes and obesity, is on the rise globally. As the number of individuals at risk for chronic wounds increases, so does the demand for effective wound care solutions like biomaterial dressings. The growing burden of chronic wounds and related diseases, coupled with advancements in biomaterial technology, is expected to fuel the demand for biomaterial wound dressings in healthcare. These dressings hold the promise of improved wound management and better quality of life for affected individuals.

Government Initiatives Regarding Wound Care Treatment

Government initiatives focused on wound care treatment are expected to play a pivotal role in increasing the demand for biomaterial wound dressings in the healthcare sector. These initiatives are driven by a recognition of the significant healthcare and economic burdens associated with chronic wounds and the potential benefits of advanced wound care solutions. Government healthcare programs and agencies often prioritize wound care and wound management as part of their public health agendas. These initiatives aim to improve the overall quality of wound care treatments and outcomes. As governments invest in research, education, and awareness campaigns to address the growing burden of chronic wounds, they are likely to encourage the adoption of advanced wound dressings like biomaterials, which offer enhanced

therapeutic properties and outcomes.

Government-funded healthcare systems, particularly in countries with universal healthcare, may provide reimbursement and coverage for biomaterial wound dressings. This financial support can significantly reduce the financial burden on patients and healthcare facilities, making advanced wound care options more accessible. As a result, patients are more likely to receive the most effective treatments available, including biomaterial wound dressings.

Regulatory bodies often play a role in setting standards and guidelines for wound care treatment. Government agencies that oversee healthcare quality and safety may recommend or require the use of advanced wound dressings, such as biomaterials, in specific clinical situations. These guidelines can drive healthcare providers to adopt biomaterial wound dressings as the preferred treatment choice.

Increasing Incidence of Sports Injuries

One of the key factors driving the global biomaterial wound dressing market growth is the increasing incidence of sports injuries and chronic wounds. Every year, about 4-5 million people aged 15 years or above avail treatments in European hospitals for sports-related injuries. In the US, high-school athletes alone account for 2-2.5 million injuries and 2.5 times doctor visits each year, showcasing the significant impact of sports-related injuries on healthcare systems. The number of these injuries in the US has seen a noticeable increase of about 4-5 times during the period from 2000 to 2020, highlighting the growing concern and need for effective wound care solutions.

Considering these factors, the global biomaterial wound dressing market is expected to witness significant growth in the forecast period. The demand for advanced wound care solutions that can cater to the specific needs of sports injuries, chronic wounds, and associated complications is set to drive innovation and investment in this market segment.

Technological Advances in Biomaterials and Their Application In Wound Dressing

Technological advances in biomaterials and their application in wound dressing are poised to significantly increase the demand for these innovative healthcare products. These advancements are revolutionizing wound care by offering more effective and patient-centric solutions for various types of wounds.

The development of biomaterials with enhanced properties has led to wound dressings that provide superior therapeutic benefits. These materials are engineered to promote wound healing, minimize infection risk, and create a conducive environment for tissue regeneration. As technology continues to improve biomaterials, wound dressings are becoming more effective in addressing the specific needs of different types of wounds, such as chronic ulcers, burns, and surgical incisions. Healthcare providers are increasingly recognizing the advantages of these advanced materials and are thus driving the demand for biomaterial wound dressings.

Technological innovations have led to the production of biomaterial dressings that incorporate smart features such as drug delivery systems, sensing capabilities, and antimicrobial properties. These functionalities not only enhance the healing process but also improve patient comfort and compliance. As the healthcare industry embraces these technological advancements, the demand for biomaterial wound dressings is expected to rise, driven by the desire for more sophisticated and patient-centered wound care options.

Key Market Challenges

Strict Regulatory Compliances for Biomaterial Wound Dressings

Commercial wound care products are subject to strict regulatory requirements and standards imposed by international and local regulatory authorities. These include renowned organizations such as the Food and Drug Administration (FDA), the European Medicine Agency (EMA), and the American Society for Testing and Materials (ASTM) International. For instance, when it comes to surgical tapes, compliance with internationally recognized standards, such as ASTM PSTC/6 standards by the member countries of ASTM International, is crucial.

It is important to note that the landscape of statutory requirements and regional differences in product standardization can pose challenges for global wound care product manufacturers in their day-to-day operations. Given the intricate web of regulatory compliance, it is imperative for commercial wound care product manufacturers to navigate the regulatory landscape diligently and stay up-to-date with evolving standards to ensure the safety and efficacy of their products in the market.

Lack of Proper Reimbursement

The lack of proper reimbursement mechanisms for biomaterial wound dressings is a significant factor expected to decrease the demand for these advanced wound care solutions. Reimbursement challenges can hinder patient access to biomaterial wound dressings and deter healthcare providers from adopting them as the preferred treatment option.

The cost of biomaterial wound dressings is often higher than that of traditional wound care products. While biomaterials offer advanced therapeutic benefits and improved healing outcomes, they are more expensive to manufacture and may require specialized training for their application. In the absence of adequate reimbursement, patients and healthcare facilities may be reluctant to bear these additional costs, opting for more affordable alternatives instead. The reimbursement landscape for wound care products varies from one healthcare system to another and can be complex. In some regions, reimbursement policies may not adequately cover the cost of biomaterial wound dressings or may have restrictive criteria for their use. This lack of clarity and consistency can create uncertainty for healthcare providers and deter them from incorporating biomaterial dressings into their wound care protocols.

Key Market Trends

Biomaterial Wound Dressing from The Geriatric Population

Another key factor driving the robust growth of the global biomaterial wound dressing market is the significant demand from the geriatric population. This demand is driven by various factors, including the increasing prevalence of falls among older adults.

Globally, between 25% and 35% of fall incidents are recorded to occur in people aged 65 or above, leading to unintentional injuries. In countries like the UK, Canada, and Australia, the rate of hospital admission of the geriatric population due to falls is reported to be between 1 and 3 per 10,000 population.

In addition to falls, diabetes is another prevalent health condition among the elderly population. The CDC reports that in 2020, approximately 30% of people aged 65 years or above in the US will suffer from diabetes. The prevalence of diabetes among the elderly is expected to increase significantly in the coming years. This implies that a substantial portion of the world's population, around 16%, will be aged 65 years or above, further driving the demand for biomaterial wound dressings tailored to the specific needs of this population segment. Given these factors, it is anticipated that the global biomaterial wound dressing market will witness continued growth and expansion in the forecast period, as the aging population continues to demand innovative and

effective solutions for wound management and healing.

Advancements In Nanotechnology Create New Applications of Biomaterials

Advancements in nanotechnology have paved the way for innovative applications of biomaterials, particularly in the realm of wound dressing. These developments are expected to significantly boost the demand for biomaterial wound dressings. Nanotechnology allows for the design and manipulation of materials on an unprecedentedly minute scale, leading to the creation of biomaterial wound dressings that possess superior properties. Such dressings can promote accelerated wound healing, reduce infection risk, and enhance patient comfort through factors like improved breathability and flexibility. They are also able to deliver medications directly to the wound site, enhancing therapeutic effectiveness. The potential to incorporate nanotechnology-enabled sensors into these dressings could revolutionize wound management, with real-time monitoring of wound status and environment, leading to timely and personalized interventions. These technological leaps in wound care, enabled by nanotechnology, make biomaterial dressings more appealing, efficient, and effective. As such, they are likely to drive increased demand in the healthcare sector, especially as the global population ages and the prevalence of chronic conditions such as diabetes, which often result in complicated wounds, rises.

Segmental Insights

Product Insights

Based on Product, Alginate Dressing have emerged as the fastest growing segment in the Global Biomaterial Wound Dressing Market in 2023. Alginate dressing refers to lightweight, non-woven natural wound dressings composed of highly absorbent materials that promote healing. They are widely utilized in exuding wounds, where excess fluid is present. Alginate dressing is typically derived from seaweed and possesses excellent absorbency, creating a moist wound environment conducive to treating dry injuries. Alginate dressing is suitable for managing bleeding wounds and maintaining moisture around nerve endings, thereby reducing pain. These attributes make them preferable for heavily draining wounds, surgical wounds, first and second-degree burns, and donor sites, driving segment growth in the forecast period. Alginate, known for its hydrophilic nature, is extensively employed for its wound healing properties. Due to its hydrophilic nature, alginate wound dressings can be found in various forms such as beads, blends, dressings, electrospun scaffolds, flexible fibers, films, foams, gels, hydrogels, injections, microparticles, microspheres, nanoparticles,

polyelectrolyte complexes, powders, ropes, sheets, sponges, and others. These versatile forms are particularly suitable for post-traumatic or exuding wounds. The extensive application of alginate dressings is expected to drive the growth of this segment in the forecast period.

Application Insights

Based on Application, Wounds have emerged as the dominating segment in the Global Biomaterial Wound Dressing Market in 2023. This remarkable accomplishment can be attributed to several factors. The growing prevalence of chronic diseases worldwide has necessitated the development of advanced wound dressings that can effectively prevent infections and promote efficient wound healing. The increasing awareness among healthcare professionals and patients about the importance of proper wound care has contributed to the surge in demand for innovative and effective wound dressings. These dressings not only provide superior protection but also offer enhanced comfort and convenience to patients during the healing process. With the continuous advancements in biomaterial technology, the wound segment is poised to maintain its dominance and drive the overall growth of the Global Biomaterial Wound Dressing industry in the coming years.

Regional Insights

Based on Region, North America have emerged as the dominating region in the Global Biomaterial Wound Dressing Market in 2023. This dominance can be attributed to several factors, with the large population of elderly individuals playing a significant role. With a growing number of aging citizens requiring wound care, the demand for advanced wound dressing products and technologies has skyrocketed in the region. This surge in investments is expected to fuel the development of the regional market in the years to come.

Key Market Players

3M Company

ConvaTec Group PLC

DermaRite Industries LLC

B. Braun SE

Hollister Incorporated

Integra LifeSciences Corporation

Johnson & Johnson Services, Inc.

Medtronic PLC

Molnlycke Health Care AB

Smith & Nephew PLC

Report Scope:

In this report, the Global Biomaterial Wound Dressing Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Biomaterial Wound Dressing Market, By Product:

Alginate Dressing

Hydrocolloids

Skin Substitutes

Others

Biomaterial Wound Dressing Market, By Type:

Primary

Secondary

Biomaterial Wound Dressing Market, By Application:

Wounds

Burns

Ulcers

Others

Biomaterial Wound Dressing Market, By End User:

Hospitals & Clinics

Ambulatory Surgical Centers

Homecare

Biomaterial Wound Dressing 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 Biomaterial Wound Dressing Market.

Available Customizations:

Global Biomaterial Wound Dressing 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

Biomaterial Wound Dressing Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented...

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

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validations
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. GLOBAL BIOMATERIAL WOUND DRESSING MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Product (Alginate Dressing, Hydrocolloids, Skin Substitutes, Others)
 - 5.2.2. By Type (Primary and Secondary)
 - 5.2.3. By Application (Wounds, Burns, Ulcers, Others)
 - 5.2.4. By End User (Hospitals & Clinics, Ambulatory Surgical Centers, Homecare)

- 5.2.5. By Region
- 5.2.6. By Company (2023)
- 5.3. Market Map

6. NORTH AMERICA BIOMATERIAL WOUND DRESSING MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Product
 - 6.2.2. By Type
 - 6.2.3. By Application
 - 6.2.4. By End User
 - 6.2.5. By Country
- 6.3. North America: Country Analysis
 - 6.3.1. United States Biomaterial Wound Dressing Market Outlook
 - 6.3.1.1. Market Size & Forecast
 - 6.3.1.1.1. By Value
 - 6.3.1.2. Market Share & Forecast
 - 6.3.1.2.1. By Product
 - 6.3.1.2.2. By Type
 - 6.3.1.2.3. By Application
 - 6.3.1.2.4. By End User
 - 6.3.2. Canada Biomaterial Wound Dressing Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Product
 - 6.3.2.2.2. By Type
 - 6.3.2.2.3. By Application
 - 6.3.2.2.4. By End User
 - 6.3.3. Mexico Biomaterial Wound Dressing Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Product
 - 6.3.3.2.2. By Type
 - 6.3.3.2.3. By Application
 - 6.3.3.2.4. By End User

7. EUROPE BIOMATERIAL WOUND DRESSING MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Product

7.2.2. By Type

7.2.3. By Application

7.2.4. By End User

7.2.5. By Country

7.3. Europe: Country Analysis

7.3.1. Germany Biomaterial Wound Dressing Market Outlook

7.3.1.1. Market Size & Forecast

7.3.1.1.1. By Value

7.3.1.2. Market Share & Forecast

7.3.1.2.1. By Product

7.3.1.2.2. By Type

7.3.1.2.3. By Application

7.3.1.2.4. By End User

7.3.2. United Kingdom Biomaterial Wound Dressing Market Outlook

7.3.2.1. Market Size & Forecast

7.3.2.1.1. By Value

7.3.2.2. Market Share & Forecast

7.3.2.2.1. By Product

7.3.2.2.2. By Type

7.3.2.2.3. By Application

7.3.2.2.4. By End User

7.3.3. Italy Biomaterial Wound Dressing Market Outlook

7.3.3.1. Market Size & Forecast

7.3.3.1.1. By Value

7.3.3.2. Market Share & Forecast

7.3.3.2.1. By Product

7.3.3.2.2. By Type

7.3.3.2.3. By Application

7.3.3.2.4. By End User

7.3.4. France Biomaterial Wound Dressing Market Outlook

7.3.4.1. Market Size & Forecast

7.3.4.1.1. By Value

7.3.4.2. Market Share & Forecast

7.3.4.2.1. By Product

7.3.4.2.2. By Type

7.3.4.2.3. By Application

7.3.4.2.4. By End User

7.3.5. Spain Biomaterial Wound Dressing Market Outlook

7.3.5.1. Market Size & Forecast

7.3.5.1.1. By Value

7.3.5.2. Market Share & Forecast

7.3.5.2.1. By Product

7.3.5.2.2. By Type

7.3.5.2.3. By Application

7.3.5.2.4. By End User

8. ASIA PACIFIC BIOMATERIAL WOUND DRESSING MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Product

8.2.2. By Type

8.2.3. By Application

8.2.4. By End User

8.2.5. By Country

8.3. Asia Pacific: Country Analysis

8.3.1. China Biomaterial Wound Dressing Market Outlook

8.3.1.1. Market Size & Forecast

8.3.1.1.1. By Value

8.3.1.2. Market Share & Forecast

8.3.1.2.1. By Product

8.3.1.2.2. By Type

8.3.1.2.3. By Application

8.3.1.2.4. By End User

8.3.2. India Biomaterial Wound Dressing Market Outlook

8.3.2.1. Market Size & Forecast

8.3.2.1.1. By Value

8.3.2.2. Market Share & Forecast

8.3.2.2.1. By Product

8.3.2.2.2. By Type

- 8.3.2.2.3. By Application
- 8.3.2.2.4. By End User
- 8.3.3. Japan Biomaterial Wound Dressing Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Product
 - 8.3.3.2.2. By Type
 - 8.3.3.2.3. By Application
 - 8.3.3.2.4. By End User
- 8.3.4. South Korea Biomaterial Wound Dressing Market Outlook
 - 8.3.4.1. Market Size & Forecast
 - 8.3.4.1.1. By Value
 - 8.3.4.2. Market Share & Forecast
 - 8.3.4.2.1. By Product
 - 8.3.4.2.2. By Type
 - 8.3.4.2.3. By Application
 - 8.3.4.2.4. By End User
- 8.3.5. Australia Biomaterial Wound Dressing Market Outlook
 - 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value
 - 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Product
 - 8.3.5.2.2. By Type
 - 8.3.5.2.3. By Application
 - 8.3.5.2.4. By End User

9. SOUTH AMERICA BIOMATERIAL WOUND DRESSING MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Product
 - 9.2.2. By Type
 - 9.2.3. By Application
 - 9.2.4. By End User
 - 9.2.5. By Country
- 9.3. South America: Country Analysis
 - 9.3.1. Brazil Biomaterial Wound Dressing Market Outlook

- 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
- 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Product
 - 9.3.1.2.2. By Type
 - 9.3.1.2.3. By Application
 - 9.3.1.2.4. By End User
- 9.3.2. Argentina Biomaterial Wound Dressing Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Product
 - 9.3.2.2.2. By Type
 - 9.3.2.2.3. By Application
 - 9.3.2.2.4. By End User
- 9.3.3. Colombia Biomaterial Wound Dressing Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Product
 - 9.3.3.2.2. By Type
 - 9.3.3.2.3. By Application
 - 9.3.3.2.4. By End User

10. MIDDLE EAST AND AFRICA BIOMATERIAL WOUND DRESSING MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Product
 - 10.2.2. By Type
 - 10.2.3. By Application
 - 10.2.4. By End User
 - 10.2.5. By Country
- 10.3. MEA: Country Analysis
 - 10.3.1. South Africa Biomaterial Wound Dressing Market Outlook
 - 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Value

10.3.1.2. Market Share & Forecast

10.3.1.2.1. By Product

10.3.1.2.2. By Type

10.3.1.2.3. By Application

10.3.1.2.4. By End User

10.3.2. Saudi Arabia Biomaterial Wound Dressing Market Outlook

10.3.2.1. Market Size & Forecast

10.3.2.1.1. By Value

10.3.2.2. Market Share & Forecast

10.3.2.2.1. By Product

10.3.2.2.2. By Type

10.3.2.2.3. By Application

10.3.2.2.4. By End User

10.3.3. UAE Biomaterial Wound Dressing Market Outlook

10.3.3.1. Market Size & Forecast

10.3.3.1.1. By Value

10.3.3.2. Market Share & Forecast

10.3.3.2.1. By Product

10.3.3.2.2. By Type

10.3.3.2.3. By Application

10.3.3.2.4. By End User

11. MARKET DYNAMICS

11.1. Drivers

11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

12.1. Recent Development

12.2. Mergers & Acquisitions

12.3. Product Launches

13. GLOBAL BIOMATERIAL WOUND DRESSING MARKET: SWOT ANALYSIS

14. PORTER'S FIVE FORCES ANALYSIS

14.1. Competition in the Industry

14.2. Potential of New Entrants

- 14.3. Power of Suppliers
- 14.4. Power of Customers
- 14.5. Threat of Substitute Products

15. COMPETITIVE LANDSCAPE

- 15.1. 3M Company
 - 15.1.1. Business Overview
 - 15.1.2. Company Snapshot
 - 15.1.3. Products & Services
 - 15.1.4. Financials (As Reported)
 - 15.1.5. Recent Developments
 - 15.1.6. Key Personnel Details
 - 15.1.7. SWOT Analysis
- 15.2. ConvaTec Group PLC
- 15.3. DermaRite Industries LLC
- 15.4. B. Braun SE
- 15.5. Hollister Incorporated
- 15.6. Integra LifeSciences Corporation
- 15.7. Johnson & Johnson Services, Inc.
- 15.8. Medtronic PLC
- 15.9. Molnlycke Health Care AB
- 15.10. Smith & Nephew PLC

16. STRATEGIC RECOMMENDATIONS

17. ABOUT US & DISCLAIMER

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