

# **Diabetic Foot Ulcer Biologics Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Indication (Neuro-ischemic Ulcers, Neuropathic Diabetic Foot Ulcer, Ischemic Diabetic Foot Ulcer), By End User (Hospitals, Clinics, Ambulatory Surgical Centers, Long-Term Care Settings, Others), By Region and Competition, 2020-2030F**

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## **Abstracts**

Global Diabetic foot ulcer (DFU) biologics market was valued at USD 0.65 billion in 2024 and is projected to reach USD 0.88 billion by 2030, growing at a compound annual growth rate (CAGR) of 5.41% during the forecast period. DFUs pose a significant burden on healthcare systems worldwide, driven by their high prevalence and the complications they often entail. These ulcers typically result from impaired circulation, neuropathy, and weakened immune response, making them particularly challenging to treat through conventional methods.

Biologic therapies—such as growth factors, gene therapies, and cellular treatments—are increasingly being adopted for their ability to enhance wound healing, minimize infection risks, and mitigate further complications. The market features a diverse portfolio of biologic products, including platelet-rich plasma (PRP), skin substitutes, stem cell therapies, and recombinant human growth factors. These treatments aim to stimulate tissue regeneration, accelerate healing, and reduce the reliance on invasive interventions, such as amputation.

As medical professionals continue to recognize the clinical benefits of biologics in DFU

management, the demand for these therapies is anticipated to grow consistently. However, one of the primary obstacles to broader adoption is the high cost associated with biologic treatments. These therapies often require sophisticated manufacturing processes and complex delivery systems, contributing to their elevated pricing. This presents a significant challenge for healthcare providers and patients operating within constrained budgets.

## Key Market Drivers

### Expansion of the Healthcare Sector

The rising global incidence of diabetes is a major driver of DFU prevalence, with approximately 15% of diabetic patients developing foot ulcers. Currently, the global prevalence of DFUs among adults with diabetes is estimated at 6.3%, with annual incidence rates ranging from 9.1 to 26.1 million cases. Risk factors include long-standing diabetes, poor glycemic control, peripheral neuropathy, and foot abnormalities such as calluses or deformities.

This growing patient population necessitates more effective treatment modalities, including biologics. Ongoing investment in healthcare research and technological innovation is accelerating the development of novel biologic therapies, improving clinical outcomes and enhancing market growth. Notably, AI-powered diagnostic tools and applications are increasingly used to support the detection and management of DFUs, further improving efficiency and treatment precision.

## Key Market Challenges

### High Cost of Treatment

Biologic therapies are derived from living organisms and involve highly regulated, intricate manufacturing processes, including cell cultivation, purification of biologically active substances, and development of engineered tissues. These processes often require specialized infrastructure, advanced equipment, and stringent quality assurance protocols, all of which contribute to increased production costs.

Additionally, the research and development (R&D) required to bring biologic products to market is both time-intensive and capital-intensive. Companies must conduct comprehensive preclinical studies and clinical trials to validate product safety and efficacy, as well as navigate complex regulatory pathways. These high development

costs are ultimately reflected in the pricing of biologic treatments, posing financial challenges for both healthcare systems and patients.

## Key Market Trends

### Rising Global Diabetes Prevalence

The incidence of diabetes has increased dramatically over recent decades, particularly in low- and middle-income countries where healthcare access remains limited. The global diabetic population surged from 200 million in 1990 to 830 million by 2022. In 2021 alone, diabetes and its related complications—including kidney disease—accounted for over 2 million deaths. Elevated blood glucose levels were also responsible for approximately 11% of all cardiovascular-related fatalities.

This rising prevalence has directly contributed to an increase in DFU cases, creating greater demand for effective, advanced treatment solutions such as biologics. The DFU biologics market is witnessing robust growth, driven by increasing disease incidence and the expanding availability of innovative therapies. Biologic treatments, particularly those utilizing growth factors and cell-based therapies, are gaining widespread adoption due to their superior efficacy in wound healing and infection control.

## Key Market Players

Organogenesis Inc.

Tissue Regenix Group Plc

BioTissue Holdings, Inc.

Integra LifeSciences Holdings Corporation

MIMEDX Group, Inc.

Convatec Inc.

Smith & Nephew PLC

Stedical Scientific, Inc.

Zimmer Biomet Holdings, Inc.

GUNZE LIMITED

## Report Scope

In this report, the Global Diabetic Foot Ulcer Biologics Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Diabetic Foot Ulcer Biologics Market, By Indication:

Neuro-ischemic Ulcers

Neuropathic Diabetic Foot Ulcer

Ischemic Diabetic Foot Ulcer

Diabetic Foot Ulcer Biologics Market, By End User:

Hospitals

Clinics

Ambulatory Surgical Centers

Long-Term Care Settings

Others

Diabetic Foot Ulcer Biologics 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 Diabetic Foot Ulcer Biologics Market.

### Available Customizations:

Global Diabetic Foot Ulcer Biologics 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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