

Negative Pressure Wound Therapy Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Product (Conventional NPWT, Single-Use NPWT), By Wound Type (Diabetic Foot Ulcers, Venous Leg Ulcers, Pressure Ulcers, Burn Wounds, Others), By End-use (Hospitals, Homecare, Others), By Region, By Competition Forecast & Opportunities, 2018-2028F

<https://marketpublishers.com/r/N8441BA6FC52EN.html>

Date: October 2023

Pages: 170

Price: US\$ 4,900.00 (Single User License)

ID: N8441BA6FC52EN

Abstracts

The Global Negative Pressure Wound Therapy Market has reached a valuation of USD 2.34 billion in 2022 and is poised for substantial growth, with an expected Compound Annual Growth Rate (CAGR) of 6.47% through 2028. The Global Negative Pressure Wound Therapy (NPWT) Market pertains to the medical technologies and products employed in the treatment of diverse wounds and ulcers by applying negative pressure to promote wound healing and manage exudate. NPWT has garnered significant attention in the healthcare sector due to its efficacy in expediting wound healing, lowering the risk of infection, and enhancing patient outcomes.

Key Market Drivers

Aging Population

The global healthcare landscape is undergoing a transformation, driven in part by the aging population. As people worldwide are living longer, they are also experiencing an increased prevalence of chronic health conditions, leading to a greater demand for advanced medical treatments. One such treatment that has seen significant growth is

Negative Pressure Wound Therapy (NPWT). The world's population is aging at an unprecedented rate. According to the United Nations, by 2050, the global population aged 60 and above is expected to reach 2.1 billion, nearly double what it was in 2017. This demographic shift is significant because aging is often accompanied by health issues that can lead to chronic wounds, including diabetes, circulatory problems, and pressure ulcers. Aging is a natural process, but it is also associated with an increased likelihood of chronic health conditions. Chronic diseases such as diabetes, peripheral vascular disease, and obesity become more prevalent with age. These conditions can lead to slow-healing or non-healing wounds, which are often challenging to manage. NPWT has emerged as a crucial tool in addressing these complex wounds effectively. Aging patients often present with complex wounds that require specialized care. NPWT provides a non-invasive and advanced wound management solution that can significantly improve the healing process. Its ability to remove excess fluid, reduce infection risk, and promote tissue granulation makes it an attractive option for healthcare professionals dealing with elderly patients. The cost of treating chronic wounds in aging populations can be substantial. Extended hospital stays, frequent outpatient visits, and the risk of complications all contribute to healthcare expenditures. NPWT can help reduce the economic burden by facilitating faster wound healing, thus lowering hospitalization durations and the overall cost of care. The elderly population often faces diminished quality of life due to chronic wounds that limit mobility and independence. NPWT can enhance the quality of life for these patients by expediting wound closure and reducing pain. As a result, patients can regain their mobility and independence more quickly.

Emerging Markets

The Global Negative Pressure Wound Therapy (NPWT) market has been witnessing remarkable growth, driven by several factors, including advancements in medical technology and increased awareness about the benefits of NPWT. One noteworthy contributor to this growth is the burgeoning presence of emerging markets. These regions, characterized by rapid economic development and an expanding healthcare infrastructure, hold immense potential to propel the NPWT market to new heights. Emerging markets, often found in developing countries, are characterized by dynamic economic growth, increasing healthcare expenditures, and a growing middle-class population. These markets are witnessing a transformation in healthcare delivery, with improved access to advanced medical treatments and technologies. As a result, they offer a promising landscape for healthcare-related industries, including the NPWT market. Emerging markets are experiencing a surge in chronic diseases, such as diabetes, obesity, and cardiovascular disorders. These conditions are associated with a

higher risk of non-healing wounds, making NPWT a vital tool in wound management and accelerating healing. As the prevalence of these diseases increases, so does the demand for NPWT. Emerging markets are witnessing a rise in surgical procedures, driven by factors such as increased healthcare spending, the adoption of modern medical practices, and a growing aging population. Surgical wounds often benefit from NPWT, leading to a higher demand for this technology. Emerging markets are investing heavily in expanding their healthcare infrastructure, including the establishment of modern hospitals and clinics. With a growing number of healthcare facilities, there is a greater opportunity for the adoption of NPWT technology. As healthcare literacy improves in emerging markets, both healthcare professionals and patients become more aware of advanced wound care solutions like NPWT. This increased awareness drives demand and adoption rates. NPWT, although initially considered expensive, can be a cost-effective solution in the long run, especially in emerging markets where the cost of hospital stays, and post-operative care can be high. This cost-effectiveness is encouraging healthcare providers and policymakers to embrace NPWT.

Rise in Chronic Diseases

The Global Negative Pressure Wound Therapy (NPWT) market is experiencing remarkable growth, and one of the key drivers behind this expansion is the alarming increase in chronic diseases worldwide. These conditions, which include diabetes, obesity, cardiovascular diseases, and more, often lead to chronic wounds that require sophisticated wound care solutions like NPWT. Chronic diseases have reached epidemic proportions globally, posing a significant public health challenge. The World Health Organization (WHO) reports that chronic diseases account for approximately 71% of all global deaths, making them the leading cause of mortality worldwide. This alarming trend is driven by several factors, including sedentary lifestyles, poor dietary choices, aging populations, and genetic predisposition. Chronic diseases, particularly diabetes and peripheral vascular diseases, often lead to chronic wounds. These wounds are slow to heal and prone to complications, such as infections and tissue necrosis. NPWT has emerged as an invaluable tool for managing these wounds effectively. NPWT promotes wound healing by creating a controlled environment that stimulates blood flow, reduces edema, and removes excess fluids. For patients with chronic wounds, NPWT can significantly accelerate the healing process and improve overall outcomes. Patients with chronic wounds are at higher risk of infections and other complications, which can lead to prolonged hospital stays and increased healthcare costs. NPWT can mitigate these risks, making it a cost-effective solution in the long run. Diabetic patients are particularly prone to foot ulcers, a common complication of diabetes. NPWT has demonstrated its effectiveness in managing diabetic foot ulcers,

which are notorious for their slow healing and potential for amputation. As the number of individuals affected by chronic diseases continues to rise, so does the pool of potential NPWT patients. This expansion of the patient base is a significant driver of market growth.

Surgical Procedures

The Global Negative Pressure Wound Therapy (NPWT) market has been experiencing substantial growth, and one of the driving forces behind this expansion is the continuous evolution of surgical procedures. As surgical techniques become more advanced and widespread, the demand for innovative wound care solutions like NPWT is on the rise. Negative Pressure Wound Therapy, also known as vacuum-assisted closure (VAC) therapy, is a sophisticated medical approach used to expedite wound healing. It involves applying controlled negative pressure to a wound through a vacuum pump connected to a specialized dressing. This process removes excess fluids, stimulates blood flow, and encourages the growth of healthy tissue, leading to improved wound healing outcomes. Modern medicine has seen a surge in complex surgical procedures, including organ transplants, reconstructive surgeries, and bariatric surgeries. These operations often result in larger surgical wounds that require specialized wound care solutions like NPWT for optimal healing. Minimally invasive surgical techniques have gained popularity due to their reduced recovery times and minimal scarring. However, even these procedures may necessitate NPWT for optimal healing, especially in cases where larger incisions are made, or complications arise. Trauma and emergency surgeries are on the rise, driven by accidents and unforeseen medical events. NPWT can be a critical tool in managing wound care during emergency procedures, reducing the risk of complications.

Key Market Challenges

High Initial Costs

One of the primary challenges faced by the NPWT market is the relatively high initial costs associated with the technology. The equipment and consumables required for NPWT can be expensive for healthcare facilities, making it a significant investment. Smaller and underfunded healthcare institutions may find it challenging to afford these upfront costs.

Reimbursement Issues

NPWT reimbursement policies and practices can vary greatly between countries and regions. In some areas, healthcare providers struggle with inconsistent reimbursement rates or complicated billing processes. This can create uncertainty and hinder the adoption of NPWT.

Technological Barriers

While NPWT technology has advanced significantly, there is still room for improvement. Smaller, more portable devices are needed to improve patient mobility and comfort. Additionally, ensuring that NPWT systems are user-friendly and can be effectively used by healthcare professionals in various settings is an ongoing challenge.

Global Supply Chain Disruptions

The COVID-19 pandemic underscored the vulnerability of global supply chains. NPWT relies on the timely availability of consumables and equipment, and disruptions in the supply chain can impact patient care. Manufacturers and healthcare facilities need to ensure a robust supply chain to meet demand.

Key Market Trends

Portable and Wearable Devices

One of the most exciting developments in the NPWT market is the emergence of portable and wearable devices. Traditional NPWT systems are often bulky and require patients to remain immobile. However, wearable NPWT devices offer increased mobility and comfort, enabling patients to continue with their daily activities while receiving therapy. These compact, user-friendly devices are expected to revolutionize wound care and enhance patient compliance.

Connected Healthcare Ecosystem

The integration of NPWT systems into connected healthcare ecosystems is another significant trend on the horizon. These smart devices will enable healthcare providers to remotely monitor patients' progress, ensuring that the therapy is administered effectively. Real-time data collection and analysis will enhance decision-making, potentially reducing the risk of complications and improving patient outcomes.

Advanced Dressing Materials

Innovations in dressing materials are set to play a pivotal role in the NPWT market's future. Manufacturers are continuously researching and developing novel materials that can better conform to wound shapes, enhance fluid management, and improve patient comfort. These materials aim to make NPWT more effective and convenient for both patients and healthcare providers.

Bioactive NPWT Solutions

Bioactive NPWT solutions are designed to accelerate wound healing by promoting tissue regeneration and reducing inflammation. These next-generation therapies may incorporate growth factors, antimicrobial agents, and other bioactive substances to enhance the wound healing process. As research in this field progresses, bioactive NPWT may become a standard approach for complex wounds.

Segmental Insights

Product Insights

In 2022, the conventional devices category held the largest share of revenue, primarily attributed to their high cost and growing adoption. These systems necessitate hospital admission and are impractical for homecare use due to their reliance on heavy canisters. The availability of rental options for these devices is projected to boost NPWT utilization in developing nations where purchasing power is limited.

On the other hand, the single-use NPWT devices segment is anticipated to experience a lucrative Compound Annual Growth Rate (CAGR) in the coming years. This is because they find extensive applicability in home care settings, prompting major companies to emphasize enhancing their cost-efficiency. This strategic focus has proven to be an additional advantage for single-use NPWT devices, particularly in developing countries.

Wound Type Insights

Based on the category of Wound Type, the Pressure Ulcers segment emerged as the dominant player in the global market for negative pressure wound therapy in 2022 primarily due to the extended treatment duration required. Patients dealing with pressure ulcers typically need longer hospital stays, resulting in increased healthcare expenses. Another contributing factor to this growth is its emerging application for

addressing pressure-related wounds like bedsores.

Conversely, the diabetic foot ulcers segment is expected to experience the most significant CAGR during the forecast period, mainly due to its remarkable success in NPWT treatment and the high prevalence of diabetes. Diabetic foot ulcers represent the most common form of chronic wounds, and NPWT plays a pivotal role in expediting the healing process for such injuries. Other wound categories include arterial ulcers and surgical wounds, among others.

Regional Insights

In 2022, North America claimed the most significant portion of revenue due to the increased healthcare spending and the highly advanced healthcare infrastructure within the region. Consequently, there has been a notable uptick in the adoption of NPWT devices, both in hospital settings and for homecare purposes. Meanwhile, in the Asia Pacific region, a promising CAGR is expected in the upcoming years. This projection primarily stems from the growing occurrence of traumatic incidents like burns, which subsequently fuels the demand for such therapy in this geographical area.

Key Market Players

Acelity LP Inc

Talley's Group Ltd

Smith & Nephew PLC

Devon Health Services Inc

Molnlycke Health Care AB

Medela AG

DeRoyal Industries Inc

ConvaTec Inc

Cardinal Health Inc

PAUL HARTMANN AG

Report Scope:

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

Negative Pressure Wound Therapy Market, By Product:

Conventional NPWT

Single-Use NPWT

Negative Pressure Wound Therapy Market, By Wound Type:

Diabetic Foot Ulcers

Venous Leg Ulcers

Pressure Ulcers

Burn Wounds

Others

Negative Pressure Wound Therapy Market, By End-use:

Hospitals

Homecare

Others

Negative Pressure Wound Therapy Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

United Kingdom

France

Italy

Spain

Asia-Pacific

China

Japan

India

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Negative Pressure Wound Therapy Market.

Available Customizations:

Global Negative Pressure Wound Therapy market report with the given market data, Tech Sci 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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