

# Non-Silver Antimicrobial Dressings Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, By Region and Competition, 2020-2030F

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## Abstracts

Global Non-Silver Antimicrobial Dressings Market was valued at USD 486.43 Million in 2024 and is expected to reach USD 617.71 Million by 2030 with a CAGR of 4.02% during the forecast period. Global Non-Silver Antimicrobial Dressings Market is primarily driven by the increasing prevalence of chronic wounds, such as diabetic ulcers, pressure sores, and venous leg ulcers, which require effective wound care solutions. The rise in the geriatric population and the growing incidence of conditions like diabetes and obesity further contribute to the demand for advanced wound care products. According to WHO, by 2030, one in six people worldwide will be 60 years or older. The global population aged 60 and above is projected to rise from 1 billion in 2020 to 1.4 billion by that year. By 2050, the number of people aged 60 and older will double, reaching 2.1 billion. Additionally, the number of individuals aged 80 and above is expected to triple from 2020 to 2050, reaching 426 million. Non-silver antimicrobial dressings, which offer alternatives to traditional silver-based dressings, are gaining popularity due to their ability to reduce infection risks, promote faster healing, and minimize adverse reactions. Advancements in materials science have led to the development of dressings with improved antibacterial properties, such as those using honey, iodine, and polyhexanide. The shift toward minimally invasive treatment options and increasing awareness of wound infection management also support market growth. The expansion of healthcare infrastructure in emerging economies is further driving the market.

### Key Market Drivers

#### Rising Incidence of Chronic Wounds

The increasing global prevalence of chronic wounds, including diabetic ulcers, pressure sores, venous leg ulcers, and surgical wounds, is a significant driver for the non-silver antimicrobial dressings market. These wounds are typically difficult to heal and are prone to infections, making them a serious healthcare concern, especially among aging populations. Chronic conditions like diabetes, which impair wound healing, have been on the rise worldwide, contributing to a larger patient population requiring specialized wound care. Non-silver antimicrobial dressings provide a crucial solution for these patients by preventing infection, controlling inflammation, and promoting healing. They offer a safer and more effective alternative to traditional dressings, reducing the need for more invasive treatments. According to a case report, Chronic wounds are estimated to affect 1.51–2.21 individuals per 1,000 people globally, with the incidence expected to rise as the world's population ages. Over 50% of chronic wounds occur in the foot area and are primarily composed of diabetic foot ulcers (DFUs), pressure injuries or ulcers, and arterial and venous ulcers.

The growing incidence of these chronic conditions directly correlates with the increased demand for advanced wound care solutions, driving the adoption of non-silver antimicrobial dressings across global healthcare systems.

### Aging Population and Geriatric Care

The global increase in the aging population is one of the primary drivers of the non-silver antimicrobial dressings market. Older individuals are more susceptible to chronic conditions such as diabetes, cardiovascular diseases, and mobility impairments, all of which can lead to wound complications and slower healing processes. As people age, the skin becomes more fragile, and the body's ability to fight infections and heal wounds diminishes. Consequently, there is a greater need for specialized wound care products that can address these challenges. Non-silver antimicrobial dressings, which are often more biocompatible and less likely to cause adverse reactions compared to silver-based alternatives, are increasingly preferred for geriatric wound care. The demand for effective, safe, and easy-to-use antimicrobial dressings is expanding in this demographic, thus driving the market's growth.

### Rise in Diabetic Population

Diabetes is a major underlying cause of chronic wounds, particularly diabetic foot ulcers, which are common complications for diabetic patients. According to WHO, approximately 830 million people globally have diabetes, with the majority residing in low- and middle-income countries. Over half of those living with diabetes are not

receiving treatment. The number of individuals affected by diabetes, as well as those with untreated diabetes, has been steadily rising over the past few decades.

As the global diabetic population continues to rise, the demand for non-silver antimicrobial dressings has significantly increased. These dressings are essential in managing diabetic ulcers, as they reduce the risk of infection and help control bacterial growth, which is crucial for preventing complications like gangrene and amputation. Non-silver antimicrobial dressings, particularly those with advanced features such as moisture management, have proven to be highly effective in promoting wound healing in diabetic patients. As the prevalence of diabetes continues to climb due to factors such as sedentary lifestyles, unhealthy diets, and genetic predisposition, the market for wound care products, including non-silver antimicrobial dressings, is expected to grow rapidly.

### Cost-Effectiveness and Accessibility

Cost-effectiveness is a significant factor in the growing demand for non-silver antimicrobial dressings, particularly in developing regions where healthcare budgets are limited. Non-silver antimicrobial dressings, often made from affordable materials such as iodine-based compounds, honey, or polyhexanide, offer a more cost-efficient alternative to silver-based dressings. Silver dressings, while highly effective in wound care, can be expensive, making them less accessible to patients and healthcare facilities in low-resource settings. Non-silver options provide similar antimicrobial benefits at a lower cost, making them an attractive choice for healthcare systems that are striving to balance effective treatment with budget constraints. This cost-efficiency, coupled with their proven efficacy, is propelling the widespread adoption of non-silver antimicrobial dressings globally.

### Shift Towards Natural & Organic Ingredients

There is a growing preference among healthcare professionals and patients for natural and organic wound care products, including antimicrobial dressings. Non-silver antimicrobial dressings that incorporate ingredients like honey, iodine, and alginate have become increasingly popular due to their natural antimicrobial properties and biocompatibility. Honey, for example, is widely recognized for its ability to prevent infection and promote wound healing, and has been used for centuries as a natural treatment for wounds. The shift towards more natural and sustainable products is partly driven by consumer demand for safer, less chemically intensive healthcare options. This growing trend has prompted manufacturers to invest in the development of non-silver

antimicrobial dressings using organic and naturally derived substances, further boosting the market.

### Rising Awareness of Infection Control in Wound Care

As healthcare systems worldwide focus on improving infection control practices, there is growing awareness about the importance of preventing infections in wounds, especially in chronic and high-risk patients. Infections are a major complication in wound healing, leading to prolonged hospital stays, increased healthcare costs, and poorer patient outcomes. Non-silver antimicrobial dressings offer a safe and effective method for preventing infections in wounds, making them an essential component of infection control strategies in healthcare settings. As hospitals, clinics, and home care providers increasingly prioritize infection prevention and faster wound healing, the demand for antimicrobial dressings that are effective, safe, and easy to use is rising, driving the growth of the market.

### Key Market Challenges

#### High Competition from Silver-Based Antimicrobial Dressings

One of the key challenges facing the global non-silver antimicrobial dressings market is the strong competition from silver-based antimicrobial dressings, which have historically dominated the wound care sector. Silver has long been recognized for its antimicrobial properties and has been extensively used in medical and surgical dressings to prevent infection in chronic and acute wounds. Silver-based dressings are widely accepted by healthcare professionals due to their proven effectiveness in managing infection and their broad range of applications across different types of wounds. While non-silver alternatives, such as honey-based, iodine-infused, or polyhexanide dressings, are gaining popularity due to their safety and cost-effectiveness, they often struggle to compete with the longstanding preference for silver-based products. This preference is driven by clinical familiarity and extensive research supporting the efficacy of silver dressings in managing wound infections. Consequently, the growth of the non-silver antimicrobial dressings market is constrained by the entrenched position of silver-based products in the global wound care industry. The higher price of silver-based dressings is often justified by the long history of their effectiveness in treating complex wounds. Overcoming this competitive pressure requires manufacturers of non-silver antimicrobial dressings to continue improving the efficacy and clinical acceptance of their products to establish their place in the wound care market.

## Regulatory and Approval Challenges

The regulatory landscape for medical devices, including non-silver antimicrobial dressings, can be complex and challenging, hindering the growth of the market. In many regions, including the United States, the European Union, and parts of Asia, antimicrobial dressings are subject to stringent regulatory requirements that ensure product safety, efficacy, and quality. For non-silver antimicrobial dressings, the challenge lies in meeting these regulatory standards while differentiating their products from silver-based options. Many non-silver antimicrobial dressings, especially those using natural ingredients such as honey or iodine, require extensive clinical trials to demonstrate their efficacy and safety before they can be approved for market use. The process of gaining regulatory approval can be lengthy and costly, requiring substantial investment in research, testing, and clinical studies. Some non-silver antimicrobial products, particularly those derived from organic or natural substances, may face additional scrutiny due to concerns about consistency in product quality, shelf-life stability, and long-term efficacy. As regulations evolve, manufacturers must navigate varying standards across different regions, which can add complexity and delay market entry. This regulatory burden can be particularly challenging for smaller companies or startups trying to enter the market with innovative non-silver products. Thus, regulatory hurdles remain a significant challenge in expanding the non-silver antimicrobial dressings market.

## Lack of Awareness Among Healthcare Providers and Patients

Another challenge in the global non-silver antimicrobial dressings market is the lack of awareness among healthcare providers and patients about the benefits and availability of these alternatives to silver-based dressings. Despite growing interest in non-silver options, healthcare professionals, particularly in regions with well-established wound care protocols, may be hesitant to adopt newer or less familiar products. Silver-based dressings have long been the standard of care, and many clinicians continue to rely on them due to their proven efficacy and ease of use. This preference is compounded by limited education and training regarding the advantages of non-silver alternatives, leading to slow adoption. Patients, particularly in developing regions, may not be fully aware of the benefits of non-silver antimicrobial dressings over traditional options, leading to a reluctance to try new treatments. Manufacturers of non-silver antimicrobial dressings face the challenge of educating healthcare providers and patients on the effectiveness, safety, and cost benefits of their products. This requires not only promoting the clinical advantages but also offering clear, accessible information and support to encourage the adoption of these innovative wound care solutions. The lack of

widespread awareness remains a significant barrier to market growth, especially in less developed regions where medical education and access to advanced wound care products are limited.

## Key Market Trends

### Technological Advancements in Wound Care

Advancements in wound care technology have also played a key role in driving the global market for non-silver antimicrobial dressings. Innovations in material science, such as the development of hydrogels, foam dressings, and dressings infused with natural antimicrobial agents like honey and iodine, have led to more effective solutions for managing chronic and complex wounds. In June 2022, NATROX® Wound Care entered the digital space with the introduction of its new product, NATROX® IQ. This advanced wound hub is a digital app tailored for wound care teams, enabling more efficient management of caseloads. Clinicians can ensure consistency in capturing and documenting patient wound data. Currently available through distribution partners in Hong Kong and Malaysia, NATROX® IQ aims to simplify the process of wound documentation.

These technological advancements have improved the ability of antimicrobial dressings to maintain an optimal healing environment, control infection, and reduce the frequency of dressing changes, all of which contribute to better patient outcomes. The availability of specialized dressings that can manage moisture levels, promote faster healing, and reduce patient discomfort has increased the demand for non-silver antimicrobial options in clinical and home care settings.

### Government Initiatives and Healthcare Investments

Government initiatives and increased investments in healthcare infrastructure, especially in emerging economies, are key drivers for the global non-silver antimicrobial dressings market. In many countries, governments are implementing policies and programs aimed at improving wound care and patient outcomes, particularly for chronic conditions like diabetes and cardiovascular diseases. In February 2022, Argentum Medical, a leader in medical devices supported by Shore Capital and a pioneer in silver-plated nylon technology, announced the acquisition of Anacapa Technologies' product lines, which include antimicrobial wound cleansers, gels, and irrigation solutions. Anacapa Technologies is recognized as a market leader and innovator in the development of antimicrobial wound care products.

As part of these initiatives, there is a growing emphasis on providing access to advanced wound care products, including non-silver antimicrobial dressings, in both public and private healthcare settings. Increased government spending on healthcare and wound care is facilitating the adoption of these dressings, particularly in regions where access to healthcare services has historically been limited.

## Regional Insights

North America is currently dominating the global non-silver antimicrobial dressings market, driven by its advanced healthcare infrastructure, high prevalence of chronic wounds, and strong demand for innovative wound care solutions. The United States, in particular, is a major contributor to the market in North America due to its large patient population suffering from conditions like diabetes, obesity, and cardiovascular diseases, all of which increase the risk of chronic wounds. The country's well-established healthcare system and significant investments in healthcare R&D further boost the adoption of advanced wound care products, including non-silver antimicrobial dressings.

In addition, the presence of leading healthcare providers, hospitals, and diagnostic centers in the U.S. plays a pivotal role in driving the demand for antimicrobial dressings, as these facilities are increasingly focusing on infection prevention and the promotion of faster wound healing. Non-silver antimicrobial dressings, such as honey-based, iodine-infused, and polyhexanide dressings, are gaining traction due to their proven efficacy, cost-effectiveness, and reduced risk of adverse reactions compared to silver-based alternatives. The U.S. FDA's approval of several non-silver dressing products has also created a more favorable regulatory environment, encouraging innovation and the introduction of new products into the market.

North America has a well-developed awareness of wound care management, driven by educational initiatives, healthcare campaigns, and the availability of specialized wound care services. This awareness among healthcare professionals and patients fosters the growing adoption of non-silver antimicrobial dressings, which are viewed as a safer, more sustainable alternative to traditional silver-based dressings. The increasing focus on preventive healthcare, including the management of chronic wounds, also plays a key role in the market's growth in North America.

## Key Market Players

Cardinal Health, Inc.

Essity AB

Winner Medical Co., Ltd.

Medline Industries, LP

DeRoyal Industries, Inc.

Smith & Nephew Plc

Advanced Medical Solutions Group plc

Organogenesis Inc.

Convatec Group Plc

Kane Biotech Inc.

#### Report Scope:

In this report, the Global Non-Silver Antimicrobial Dressings Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

#### Non-Silver Antimicrobial Dressings 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 Non-Silver Antimicrobial Dressings Market.

**Available Customizations:**

Global Non-Silver Antimicrobial Dressings 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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