

Scar Management Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Scar Type (Atrophic Scars, Hypertrophic and Keloid Scars, Others), By Product (Silicone Gel and Spray, Silicon Dressing, Cream and Ointment, Others), By End-use (Hospitals, Ambulatory Surgical Centers, Others) Region and Competition

<https://marketpublishers.com/r/S9C8980B834FEN.html>

Date: November 2023

Pages: 181

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

ID: S9C8980B834FEN

Abstracts

Global Scar Management Market has valued at USD 1.06 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 2.86% through 2028. The Global Scar Management Market is a dynamic and rapidly growing sector within the healthcare industry, dedicated to addressing the aesthetic and functional concerns associated with scars. Scars can result from various causes, including surgeries, injuries, burns, acne, and medical conditions, and they often have a significant impact on a person's physical and emotional well-being. The scar management market focuses on providing a wide range of products and services aimed at reducing the visibility and discomfort of scars, ultimately enhancing the quality of life for individuals.

Key factors driving the growth of the global scar management market include the rising prevalence of surgical procedures and injuries, the increasing awareness among patients about scar management solutions, and the growing demand for minimally invasive treatment options. Additionally, the expanding cosmetic surgery industry, advancements in scar management technologies, and the availability of a variety of over-the-counter scar creams, gels, and sheets further contribute to the market's expansion.

The scar management market encompasses a broad spectrum of products and services, such as silicone-based products, corticosteroids, laser therapy, pressure garments, and surgical procedures like scar revision surgery. Silicone-based products, including sheets, gels, and tapes, have gained significant popularity as they are non-invasive and easy to use, helping to flatten and fade scars over time. In recent years, laser therapy has also emerged as an effective option for scar reduction, providing non-surgical, painless treatments.

Key Market Drivers

Rising Prevalence of Surgical Procedures

The rising prevalence of surgical procedures has emerged as a significant driver behind the substantial growth of the global scar management market. Surgical interventions are indispensable in modern healthcare, addressing a broad spectrum of medical conditions and needs, ranging from life-saving surgeries to elective cosmetic procedures.

However, these surgeries invariably result in scars, which can be a source of concern for patients. As surgical procedures become more common due to advancements in medical science and an aging population, the demand for effective scar management solutions has surged.

One of the primary reasons for the increasing prevalence of surgical procedures is the aging global population. With a growing number of elderly individuals requiring various medical interventions, the number of surgeries performed annually continues to rise. Aging often brings age-related health issues that necessitate surgical treatments, contributing to a higher demand for scar management options.

Moreover, elective procedures, particularly in the field of cosmetic surgery, have witnessed a remarkable upsurge. Many people now seek aesthetic enhancements and rejuvenation treatments, leading to an expansion of the cosmetic surgery industry. While these procedures are typically elective, they too result in scars that patients may want to address. The close relationship between cosmetic surgery and scar management has led to the development of tailored solutions for aesthetic procedures, further fueling market growth.

The increased prevalence of minimally invasive surgical techniques has also played a role in the rise of surgical procedures. Minimally invasive surgeries often lead to smaller incisions and less scarring, making scar management a less invasive and more manageable process. However, even with minimally invasive procedures, patients

remain concerned about the final appearance of scars, which has led to a demand for scar management solutions optimized for these techniques.

Expanding Cosmetic Surgery Industry

The expanding cosmetic surgery industry is a key driving force behind the growth of the global scar management market. The desire for aesthetic enhancement and rejuvenation has fueled a remarkable surge in cosmetic procedures worldwide. Whether it's breast augmentations, facelifts, liposuction, or rhinoplasty, these elective surgeries often leave patients with post-surgical scars. The intersection between the cosmetic surgery and scar management industries has led to the development of specialized solutions designed to address these concerns, thereby significantly boosting the scar management market.

Cosmetic surgery procedures, while elective, have become increasingly accessible and mainstream. As societal norms evolve, there is a growing acceptance of cosmetic enhancements, and more individuals are opting for these procedures to achieve their desired appearance. Inevitably, these surgeries result in scars, leading to a parallel demand for effective scar management products and treatments.

Patients who invest in cosmetic procedures often have higher expectations for the overall outcome, including the appearance of their scars. This has driven the development of scar management solutions specifically tailored to the unique needs of cosmetic surgery patients. These solutions aim to minimize scarring, accelerate the healing process, and enhance the aesthetic result of the surgery.

The cosmetic surgery industry's growth is not limited to a single geographical region; it's a global phenomenon. As emerging markets embrace cosmetic surgery trends, the demand for scar management solutions is expanding across the globe. As a result, the scar management market is diversifying to cater to a wider audience, making it a vibrant and lucrative sector within the healthcare and beauty industries.

Furthermore, advancements in both cosmetic surgery techniques and scar management technologies have created synergies that contribute to the overall growth of the scar management market. New innovations, such as laser therapy and advanced topical treatments, provide patients with effective options to improve the appearance and comfort of their scars.

Advancements in Scar Management Technologies

Advancements in scar management technologies have emerged as a pivotal driver behind the growth of the global scar management market. These innovations represent a significant leap forward in the treatment and reduction of scars, offering patients more effective and efficient solutions to address their concerns. The development of new technologies has broadened the range of scar management options available, providing patients with a diverse set of choices to improve the appearance and comfort of their scars.

One of the most notable advancements in scar management technology is laser therapy. Laser technology has revolutionized scar treatment by offering non-invasive, painless, and highly effective solutions. Laser therapy can address a wide range of scar types, from surgical scars to acne scars, by stimulating collagen production, improving skin texture, and reducing redness and pigmentation. This non-surgical approach has gained popularity among patients seeking a minimally invasive and highly efficient method for scar reduction.

In addition to laser therapy, topical treatments have also witnessed significant advancements. Topical gels, creams, and ointments now incorporate ingredients like silicone, hyaluronic acid, and vitamin E, which have demonstrated their efficacy in minimizing scar visibility and discomfort. These products are easy to apply and provide a more accessible and cost-effective solution for scar management, contributing to the market's growth.

Furthermore, the integration of telemedicine and digital health solutions in scar management is streamlining the patient experience. Patients can access expert advice, monitor their healing progress, and even receive prescription recommendations for scar management products through telehealth platforms, reducing the need for in-person visits and enhancing the convenience of scar treatment.

Advancements in scar management technologies have also fostered increased collaboration between healthcare providers and the medical device industry. This synergy has led to the development of innovative scar management devices, such as specialized pressure garments and scar massage tools, which aid in scar reduction and comfort improvement.

The continuous research and development in this field, along with the rapid evolution of medical technology, have created a dynamic market environment. Patients now have access to a range of cutting-edge scar management options that are more effective and

efficient than ever before. These advancements have bolstered the global scar management market by increasing patient confidence in the efficacy of scar management solutions and broadening the spectrum of choices available.

Key Market Challenges

Lack of Standardization

The lack of standardization in scar management practices represents a significant challenge hindering the growth and effectiveness of the global scar management market. Scar management encompasses a wide array of treatments and products designed to reduce the visibility and discomfort of scars resulting from surgeries, injuries, burns, and other causes. However, the absence of standardized treatment protocols and guidelines poses several obstacles in this field.

One of the primary issues with the lack of standardization is the confusion it creates among both patients and healthcare providers. Without clear, evidence-based guidelines, it becomes challenging to determine the most appropriate and effective treatment for a particular scar type or condition. This uncertainty can lead to inconsistency in the quality of care, with different providers recommending various treatments, potentially resulting in suboptimal outcomes for patients.

Furthermore, the lack of standardization in scar management complicates the measurement of treatment efficacy and comparison of outcomes. Without established benchmarks, it is challenging to assess the success of different treatment modalities objectively. This lack of uniformity makes it difficult to gauge the real impact of scar management products and services on patients' lives and quality of care.

High Costs of Treatment

The high costs associated with scar management treatments represent a substantial barrier to the growth of the global scar management market. Scar management solutions aim to reduce the visibility and discomfort of scars resulting from surgeries, injuries, burns, acne, and other causes. However, the expenses incurred in seeking and maintaining these treatments can deter many individuals from accessing the care they need.

One of the primary challenges is the cost of advanced scar management technologies, such as laser therapy. While these treatments can be highly effective, they are often

prohibitively expensive for many patients. The price tag attached to laser therapy sessions can be a significant deterrent, especially considering that several sessions may be required for optimal results. As a result, individuals may opt for less expensive or even no treatment at all, which can impact the overall growth of the scar management market.

Additionally, the cost of scar management products, such as silicone-based sheets and gels, can add up over time. These products need to be used consistently for an extended period, which can result in ongoing expenses. For some patients, the cumulative cost of scar management products may become a financial burden.

High treatment costs can also create disparities in access to scar management. Individuals with limited financial resources may be unable to afford even basic scar management solutions. This inequality in access to care means that a significant portion of the population remains underserved and unable to benefit from the advancements in scar management.

Key Market Trends

Minimally Invasive Treatment Options

Minimally invasive treatment options have played a pivotal role in boosting the global scar management market. Scar management is an essential aspect of healthcare dedicated to reducing the visibility and discomfort of scars resulting from various causes, including surgeries, injuries, burns, and acne. In recent years, minimally invasive treatments have emerged as a preferred choice for both patients and healthcare providers due to their effectiveness and patient-friendly features.

One of the most prominent minimally invasive scar management treatments is laser therapy. Laser technology has revolutionized scar reduction by offering non-surgical, painless, and highly effective solutions. It involves the use of specific wavelengths of light to target and treat scar tissue, stimulating collagen production and improving skin texture. This innovative approach has gained popularity among patients seeking scar reduction, as it offers several advantages. Patients can typically achieve satisfactory results with fewer side effects and less downtime compared to traditional surgical interventions.

Silicone-based products, including sheets, gels, and tapes, have also become popular minimally invasive options. They are easy to apply and do not require medical

procedures or extensive clinical visits. Silicone sheets are designed to be worn directly on the skin over the scar area, providing constant pressure and hydration, which helps flatten and fade scars over time. Silicone gels are applied topically and are particularly effective for reducing the redness and itching associated with scars.

The appeal of minimally invasive scar management solutions lies in their patient-friendly nature. These treatments typically have shorter recovery periods and fewer risks compared to invasive surgical options, making them suitable for a broader range of patients. Minimally invasive treatments also offer patients a sense of control and convenience, as many can be administered in the comfort of their own homes.

Furthermore, advancements in minimally invasive technologies have expanded the scope of scar management. These treatments are no longer limited to reducing surgical scars but can also effectively address scars resulting from trauma, burns, and skin conditions like acne..

Availability of Over-the-Counter Products

The availability of over-the-counter (OTC) products has had a profound impact on the growth of the global scar management market. Scar management is a vital aspect of healthcare, focusing on reducing the visibility and discomfort of scars resulting from various causes, such as surgeries, injuries, burns, acne, and medical conditions. OTC scar management products, including creams, gels, tapes, and silicone-based sheets, have become readily accessible to individuals seeking effective and convenient solutions for scar reduction.

One of the primary factors contributing to the popularity of OTC scar management products is the ease of access. These products are available in local pharmacies, drugstores, and even online marketplaces, making them widely available to consumers without the need for a prescription or a visit to a healthcare provider. This convenience has empowered individuals to take control of their scar management without the necessity of a medical consultation.

Silicone-based sheets and gels, in particular, have gained significant traction in the OTC market. These products are designed for ease of use and are applied directly to the skin over the scar area. Silicone sheets, for example, provide constant pressure and hydration, which helps to flatten and fade scars over time. Their user-friendly nature and non-invasive application have made them a preferred choice for many individuals seeking to address post-surgical scars and other scar types.

Moreover, the availability of OTC scar management products has demystified the scar management process and promoted awareness. Consumers are increasingly informed about their options, and the convenience of these products has led to proactive scar management. OTC scar management products provide individuals with the opportunity to take early action to reduce the visibility of their scars, which is often associated with better outcomes.

The cost-effectiveness of OTC scar management solutions is another driving factor. While surgical and clinical interventions can be costly, OTC products offer individuals a more affordable alternative. The budget-friendly nature of these products makes scar management accessible to a broader demographic, expanding the market's reach.

Segmental Insights

Scar Type Insights

Based on the Scar Type, Hypertrophic and Keloid Scars emerged as the dominant segment in the global market for Global Scar Management Market in 2022. The high demand for scar management solutions, particularly for hypertrophic and keloid scars, can be attributed to the physical and psychological impact of these scars on individuals. Both hypertrophic and keloid scars can be disfiguring, uncomfortable, and emotionally distressing for patients. Their noticeable appearance and potential for complications drive individuals to seek effective solutions for scar reduction, such as laser therapy, silicone-based products, and topical treatments. The prevalence and awareness of hypertrophic and keloid scars, coupled with their capacity to affect a broad population, create a substantial demand for scar management products and services.

Product Insights

Based on the Product, Silicone gel and silicone dressing emerged as the dominant segment in the global market for Global Scar Management Market in 2022. Silicone gel and silicone dressing have been extensively studied and clinically proven to be effective in reducing the visibility and discomfort of scars. They work by creating a barrier that helps regulate the skin's moisture levels, reduces collagen production, and provides constant pressure to the scar area. This process ultimately leads to flatter, lighter, and less noticeable scars. Silicone-based products are user-friendly and can be applied directly to the scar area. This ease of application makes them suitable for both healthcare professionals and patients seeking over-the-counter solutions. The simplicity

of use empowers individuals to take control of their scar management journey and proactively address their scar concerns.

Regional Insights

North America emerged as the dominant player in the Global Scar Management Market in 2022, holding the largest market share. The region experiences a substantial number of surgical procedures, both for medical necessity and cosmetic purposes. Surgical interventions often lead to scarring, creating a constant demand for effective scar management solutions. With the popularity of elective cosmetic surgeries, such as breast augmentation and facelifts, North America sees a continuous influx of patients seeking scar management services. North America is a hub of medical innovation and technological advancement. The region has been at the forefront of developing cutting-edge scar management technologies, such as laser therapy, and introducing new products, like silicone-based sheets and gels. The availability of these advanced solutions has attracted both domestic and international patients seeking state-of-the-art scar management.

Key Market Players

Advancis Medical

Bayer AG

B. Braun S.E.

Bio Med Sciences, Inc.

Covalon Technologies Ltd.

Derma E

M?Inlycke Health Care AB

Newmedical Technology Inc.

Quantum Health

Smith & Nephew

Report Scope:

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

Global Scar Management Market, By Scar Type:

Atrophic Scars

Hypertrophic and Keloid Scars

Others

Global Scar Management Market, By Product:

Silicone Gel and Spray

Silicon Dressing

Cream and Ointment

Others

Global Scar Management Market, By End-use:

Hospitals

Ambulatory Surgical Centers

Others

Global Scar Management 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

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Scar Management Market.

Available Customizations:

Global Scar Management 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).

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 & Validation
- 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. GLOBAL SCAR MANAGEMENT MARKET OUTLOOK

- 4.1. Market Size & Forecast
 - 4.1.1. By Value
- 4.2. Market Share & Forecast
 - 4.2.1. By Scar Type (Atrophic Scars, Hypertrophic and Keloid Scars, Others)
 - 4.2.2. By Product (Silicone Gel and Spray, Silicon Dressing, Cream and Ointment, Others)
 - 4.2.3. By End-use (Hospitals, Ambulatory Surgical Centers, Others)
 - 4.2.4. By Region
 - 4.2.5. By Company (2022)

4.3. Market Map

- 4.3.1. By Scar Type
- 4.3.2. By Product
- 4.3.3. By End-use
- 4.3.4. By Region

5. ASIA PACIFIC SCAR MANAGEMENT MARKET OUTLOOK

5.1. Market Size & Forecast

- 5.1.1. By Value

5.2. Market Share & Forecast

- 5.2.1. By Scar Type
- 5.2.2. By Product
- 5.2.3. By End-use
- 5.2.4. By Country

5.3. Asia Pacific: Country Analysis

5.3.1. China Scar Management Market Outlook

5.3.1.1. Market Size & Forecast

- 5.3.1.1.1. By Value

5.3.1.2. Market Share & Forecast

- 5.3.1.2.1. By Scar Type
- 5.3.1.2.2. By Product
- 5.3.1.2.3. By End-use

5.3.2. India Scar Management Market Outlook

5.3.2.1. Market Size & Forecast

- 5.3.2.1.1. By Value

5.3.2.2. Market Share & Forecast

- 5.3.2.2.1. By Scar Type
- 5.3.2.2.2. By Product
- 5.3.2.2.3. By End-use

5.3.3. Australia Scar Management Market Outlook

5.3.3.1. Market Size & Forecast

- 5.3.3.1.1. By Value

5.3.3.2. Market Share & Forecast

- 5.3.3.2.1. By Scar Type
- 5.3.3.2.2. By Product
- 5.3.3.2.3. By End-use

5.3.4. Japan Scar Management Market Outlook

5.3.4.1. Market Size & Forecast

- 5.3.4.1.1. By Value
- 5.3.4.2. Market Share & Forecast
 - 5.3.4.2.1. By Scar Type
 - 5.3.4.2.2. By Product
 - 5.3.4.2.3. By End-use
- 5.3.5. South Korea Scar Management Market Outlook
 - 5.3.5.1. Market Size & Forecast
 - 5.3.5.1.1. By Value
 - 5.3.5.2. Market Share & Forecast
 - 5.3.5.2.1. By Scar Type
 - 5.3.5.2.2. By Product
 - 5.3.5.2.3. By End-use

6. EUROPE SCAR MANAGEMENT MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Scar Type
 - 6.2.2. By Product
 - 6.2.3. By End-use
 - 6.2.4. By Country
- 6.3. Europe: Country Analysis
 - 6.3.1. France Scar Management 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 Scar Type
 - 6.3.1.2.2. By Product
 - 6.3.1.2.3. By End-use
 - 6.3.2. Germany Scar Management 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 Scar Type
 - 6.3.2.2.2. By Product
 - 6.3.2.2.3. By End-use
 - 6.3.3. Spain Scar Management 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 Scar Type
 - 6.3.3.2.2. By Product
 - 6.3.3.2.3. By End-use
- 6.3.4. Italy Scar Management Market Outlook
 - 6.3.4.1. Market Size & Forecast
 - 6.3.4.1.1. By Value
 - 6.3.4.2. Market Share & Forecast
 - 6.3.4.2.1. By Scar Type
 - 6.3.4.2.2. By Product
 - 6.3.4.2.3. By End-use
- 6.3.5. United Kingdom Scar Management Market Outlook
 - 6.3.5.1. Market Size & Forecast
 - 6.3.5.1.1. By Value
 - 6.3.5.2. Market Share & Forecast
 - 6.3.5.2.1. By Scar Type
 - 6.3.5.2.2. By Product
 - 6.3.5.2.3. By End-use

7. NORTH AMERICA SCAR MANAGEMENT MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Scar Type
 - 7.2.2. By Product
 - 7.2.3. By End-use
 - 7.2.4. By Country
- 7.3. North America: Country Analysis
 - 7.3.1. United States Scar Management 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 Scar Type
 - 7.3.1.2.2. By Product
 - 7.3.1.2.3. By End-use
 - 7.3.2. Mexico Scar Management 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 Scar Type
 - 7.3.2.2.2. By Product
 - 7.3.2.2.3. By End-use
- 7.3.3. Canada Scar Management 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 Scar Type
 - 7.3.3.2.2. By Product
 - 7.3.3.2.3. By End-use

8. SOUTH AMERICA SCAR MANAGEMENT MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Scar Type
 - 8.2.2. By Product
 - 8.2.3. By End-use
 - 8.2.4. By Country
- 8.3. South America: Country Analysis
 - 8.3.1. Brazil Scar Management 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 Scar Type
 - 8.3.1.2.2. By Product
 - 8.3.1.2.3. By End-use
 - 8.3.2. Argentina Scar Management 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 Scar Type
 - 8.3.2.2.2. By Product
 - 8.3.2.2.3. By End-use
 - 8.3.3. Colombia Scar Management 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 Scar Type
 - 8.3.3.2.2. By Product
 - 8.3.3.2.3. By End-use

9. MIDDLE EAST AND AFRICA SCAR MANAGEMENT MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Scar Type
 - 9.2.2. By Product
 - 9.2.3. By End-use
 - 9.2.4. By Country
- 9.3. MEA: Country Analysis
 - 9.3.1. South Africa Scar Management 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 Scar Type
 - 9.3.1.2.2. By Product
 - 9.3.1.2.3. By End-use
 - 9.3.2. Saudi Arabia Scar Management 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 Scar Type
 - 9.3.2.2.2. By Product
 - 9.3.2.2.3. By End-use
 - 9.3.3. UAE Scar Management 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 Scar Type
 - 9.3.3.2.2. By Product
 - 9.3.3.2.3. By End-use
 - 9.3.4. Egypt Scar Management Market Outlook
 - 9.3.4.1. Market Size & Forecast

- 9.3.4.1.1. By Value
- 9.3.4.2. Market Share & Forecast
 - 9.3.4.2.1. By Scar Type
 - 9.3.4.2.2. By Product
 - 9.3.4.2.3. By End-use

10. MARKET DYNAMICS

- 10.1. Drivers
- 10.2. Challenges

11. MARKET TRENDS & DEVELOPMENTS

- 11.1. Recent Developments
- 11.2. Product Launches
- 11.3. Mergers & Acquisitions

12. GLOBAL SCAR MANAGEMENT MARKET: SWOT ANALYSIS

13. PORTER'S FIVE FORCES ANALYSIS

- 13.1. Competition in the Industry
- 13.2. Potential of New Entrants
- 13.3. Power of Suppliers
- 13.4. Power of Customers
- 13.5. Threat of Substitute Product

14. COMPETITIVE LANDSCAPE

- 14.1. Advancis Medical
 - 14.1.1. Business Overview
 - 14.1.2. Company Snapshot
 - 14.1.3. Products & Services
 - 14.1.4. Financials (In case of listed)
 - 14.1.5. Recent Developments
 - 14.1.6. SWOT Analysis
- 14.2. Bayer AG
- 14.3. B. Braun S.E.

- 14.4. Bio Med Sciences, Inc.
- 14.5. Covalon Technologies Ltd.
- 14.6. Derma E
- 14.7. M?Inlycke Health Care AB
- 14.8. Newmedical Technology Inc.
- 14.9. Quantum Health
- 14.10. Smith & Nephew

15. STRATEGIC RECOMMENDATIONS

16. ABOUT US & DISCLAIMER

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Product name: Scar Management Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Scar Type (Atrophic Scars, Hypertrophic and Keloid Scars, Others), By Product (Silicone Gel and Spray, Silicon Dressing, Cream and Ointment, Others), By End-use (Hospitals, Ambulatory Surgical Centers, Others) Region and Competition

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