



Markets for Advanced Wound Management Technologies

Jun 2014 • PHM011H

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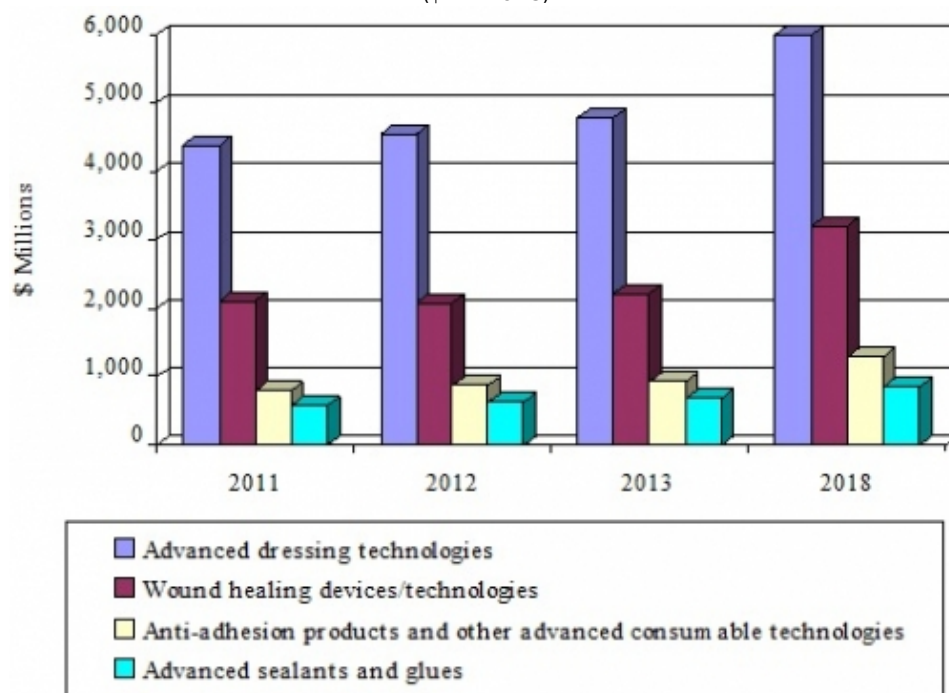
- Identify the major market trends and the factors driving or inhibiting the growth of the global pharmaceutical antibiotics market and its various submarkets.
- Learn about the challenges in the market including the higher price associated with advanced therapies over traditional, which have been augmented by decreasing hospital and surgery center budgets due to economic downturns felt in many developed nations.
- Gain information on advanced wound care market growth rates which are determined through a compilation of data including past trends, future trends, demographics, incidence, mortality, products in research, and development and current product growth.



Highlights

- The global market for advanced wound management totaled \$8.6 billion in 2013, up from 2011's value of \$7.9 billion. By 2018, this market is likely to reach \$11.3 billion, a compound annual growth rate (CAGR) of 5.6%.
- BCC Research predicts the advanced dressing technologies segment shall increase from \$4.8 billion in 2013 to nearly \$6 billion in 2018, a projected CAGR of 4.5% from 2013 to 2018.
- The wound healing devices/technologies segment will increase at a CAGR of 7.6% to reach \$3.2 billion in 2018 from \$2.2 billion in 2013.

SUMMARY FIGURE
GLOBAL ADVANCED WOUND MANAGEMENT MARKET BY MAJOR MARKET SEGMENT, 2011-2018
(\$ MILLIONS)



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Source: BCC Research

Introduction & Scope

INTRODUCTION

STUDY GOALS AND OBJECTIVES

This updated BCC Research report provides an overview of advanced wound care products, detailed market analyses and discussions of competitive environments. The study includes information about significant products, players, issues and trends and other information affecting the wound care industry.

REASONS FOR DOING THE STUDY

Advanced wound management technologies have emerged from the shadows to become, in the last 30 years, significant products in the treatment and management of wounds. While conventionally made wound management product proteins are considerable and generally less expensive, new products and biotechnological advancements are continuing to revolutionize the wound management market. New technological products are competing in a fast track market that seeks to improve the quality of life for millions of individuals needing both acute and chronic wound management.

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Ongoing patient management studies will increase the number of indications, and keeping in touch with these applications for the various advanced wound management products is good business practice. This study will provide its readers with the knowledge to adequately view and assess the advanced wound management movement and provide insight into market potential.

SCOPE OF REPORT

This document is designed to be a helpful business tool that will provide a thorough evaluation of the advanced wound management market. The scope of this study is U.S. based and identifies markets in four general segments:

- Advanced dressings.
- Surgical sealants.
- Anti-adhesion products and other related wound healing products.
- Wound healing devices.

Each market segment provides detailed information based on product categories, product use, forecasts and competitive analyses.

Advanced wound management deals with those products that involve new techniques and therapies, are of benefit in healing wounds, and result in overall lower costs for management. They incorporate biotechnological advancements and improved methods for dealing with wounds. Products in this study are considered to be at the forefront of wound management technology.

Traditional wound management products, those that have previously been used in the marketplace, are not addressed in this analysis. Industry experts classify “advanced wound management products” as those that include biological dressings, surgical sealants, synthetic dressings, anti-adhesion products and other related wound healing products

METHODOLOGY

Information for this report was obtained through primary and secondary data collection methods. Primary methods included interviews with more than 50 key executives, product managers, clinical specialists and other related key personnel involved in the wound management industry. Secondary methods included published literature, investment reports, company literature, and various business journals that have emphases on wound management and related areas.

Data for this report relates to the global market in U.S. dollars at the manufacturers’ level. The base year of the report is 2013, with historical data provided for 2011 and 2012 and forecast data provided for 2018. Historical, base year and forecast data are provided for each market segment of the report.

Growth rates are determined through a compilation of data including past trends, future trends, demographics, incidence, mortality, products in research and development, current product growth, etc. Competitor market share estimates are provided for each market segment for the 2013 base year.

PREVIOUS VERSIONS OF THIS REPORT INCLUDE:

- PHM011F Markets for Advanced Wound Care Technologies – published 2009
- PHM011G Markets for Advanced Wound Care Technologies – published 2011

ANALYSTS’ CREDENTIALS

TRACY COTTHOFF

Tracy Cotthoff is an experienced wound care nurse in a high-volume burn center in Portland, Ore. Ms. Cotthoff has been in the medical field for over 21 years. This experience has given her a vast knowledge of medical practices and advances in the industry and new technologies. Her experience in the medical field includes EMT training and nursing, including critical care nursing, which has allowed for her

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substantial insight into the workings of the healthcare industry. Ms. Cotthoff's experience and knowledge in the wound care industry is pivotal in providing an in-depth review of the wound care industry, its trends, opportunities and new developments.

MELISSA ELDER

Melissa Elder is an experienced healthcare market analyst specializing in prescription and over-the-counter pharmaceuticals, medical devices and emerging healthcare technologies. Ms. Elder has nearly 20 years of experience in the healthcare industry, specializing in market research for the past 14 years. This experience has given her a strong understanding of pharmaceutical market analysis. Her work in the medical community, including emergency room medical training and healthcare information system coordination, has enhanced her ability to provide insight into many healthcare markets.

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