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Diabetic Ulcer Treatment Market Research Report - Global Forecast till 2027


Description:

Diabetic Ulcer Treatment Market Synopsis

Diabetic Ulcer Treatment Market is estimated to be USD 7500 Million by 2025 at a CAGR of 8.5%. An increase in healthcare expenditure in developing countries is expected to drive the growth of the diabetic ulcer treatment market.

Strategic mergers & acquisitions are also likely to boost market growth with companies looking to strengthen their market positioning, increase their product portfolios, and improve their brand goodwill. For instance, in May 2019, 3M announced the acquisition of Acelity L.P.Inc. and its KCI subsidiaries for approximately USD 6.7 billion. The acquisition would help 3M strengthen its position in the diabetic ulcer treatment market.

Diabetic Ulcer Treatment Market Influencer

Increased spending on healthcare. Diabetic ulcer treatment accounted for an estimated hospitalization or amputation costs of USD 35,000 to USD 45,000 in Australia, Europe, and the Americas, and around USD 5,000 in developing countries.

Market Drivers

• Increasing geriatric population
• Rise in the prevalence rate of diabetic foot ulcers. One of the most common complications associated with diabetes is diabetic foot ulcerations. It has a global annual incidence rate of 6.3%.
• The upsurge in the adoption of technological advancements in wound care products
• Robust pipeline in diabetic ulcer treatment
• Rising patient population and advancement in health care infrastructure

Market Restraints

• The high cost of diabetic ulcer treatments. In 2017, it was estimated that in European countries the direct and indirect expenditure in the care for patients suffering from diabetic foot ulcers is USD 13,561 annually.

Diabetic Ulcer Treatment Market Segmentation

By Type

• Foot Ulcer: This segment consists of neuropathic ulcers, neuro-ischemic ulcers, and ischemic ulcers. This is the largest segment of the diabetic ulcer treatment market.

• Mouth Ulcer: This segment is estimated to hold the second-largest share of the diabetic ulcer treatment market, owing to the high prevalence of mouth ulcer in diabetic patient.
By Treatment

- **Wound Care Dressings:** This segment consists of hydrogels, foams, alginates, and others. This is estimated to be the largest segment of the diabetic ulcer treatment market, because of the increasing number of diabetic patients and mounting the geriatric population.

- **Wound Care Devices:** This segment consists of ultrasound therapy, negative pressure wound therapy device (NPWT), and hyperbaric oxygen therapy (HBOT). This segment is driven by new technological advancements in healthcare.

- **Active Therapies:** This segment includes skin grafts and substitutes and topical agents. The topical agents are used for diabetic ulcers, either as a treatment for infected wounds or to prevent infection in uninfected wounds.

By End-User

- **Hospitals and clinics:** This is the largest segment. The government support, favorable policies, and awareness campaigns initiated by governments across the globe are responsible for increasing the number of patients in hospitals and clinics. For instance, in 2016, the Government of India had launched the mDiabetes portal with the help of the World Health Organization (WHO) to spread awareness about diabetes.

- **Ambulatory Surgical Centers:** A growing segment owing to an increasing prevalence rate of diabetes and number of surgeries.

- **Academic and Research Organization:** Technology advances and research and development collaborations in medical science is driving the growth of the segment.

By Region

- **Americas:** The largest regional diabetic ulcer treatment market. As per recent reports, 30.3 million people are suffering from diabetes, which is 9.4% of the US population and almost 84.1 million adults aged 18 years or older are suffering from prediabetes, which is 33.9% of the US adult population.

- **Europe:** Europe’s 9.6% of GDP was devoted to health care in 2017. In Europe, the total expenditure spent on diabetes treatment in year 2017, was USD 207 billion. Also, the health care segment of the region is well versed, and hence, it is the second-largest market.

- **Asia-Pacific:** The fastest-growing regional market for diabetic ulcer treatment, Asia-Pacific has the world’s largest population and fast-developing healthcare industry such as in China, India, and others. In addition, East Asia has a growing elderly population which is expected to drive the market’s growth.

- **Middle East & Africa:** The underdeveloped infrastructural chain of the region makes it very difficult for the manufactures to reach their consumers. However, if the affordability rate improves the growth of the market would be even more dynamic.

Diabetic Ulcer Treatment Market Key Players

- Smith & Nephew PLC (UK)
- Integra LifeSciences Corporation (US)
- SANUWAVE Health, Inc. (US)
GLOBAL DIABETIC ULCER TREATMENT MARKET

BY TYPE (Foot Ulcer, Mouth Ulcer, Others), BY TREATMENT (Wound Care Dressing, Wound Care Devices, Active Therapies), BY END USER (Hospitals and Clinics, Ambulatory Surgical Center, Academic and Research Organization) and BY REGION (Americas, Europe, Asia-Pacific, and Middle East & Africa)

FORECAST TILL 2025

MARKET USP
Growing patient population and advancement in healthcare infrastructure

Market Size (2018) - USD
7500 MILLION
CAGR (2019-2025)
~8.5%

MARKET SEGMENTATION

- Foot ulcer segment is estimated to be the largest segment of the diabetic ulcer treatment market, increasing inclination towards avoiding the surgeries and amputation is driving the growth of foot ulcer segment
- Wound care dressings segment is expected to hold the largest share, as increasing prevalence of the acute and chronic wound in diabetic patients
- Hospitals and clinics segment is estimated to hold the largest market share, as hospitals and clinics are responsible for initiating primary treatment for diabetes patients
- Americas is estimated to be the largest regional market, as approximately 5.4% of the US population are suffering from diabetes and also the majority of the adult population of US are suffering from prediabetes

STAKEHOLDERS CONSIDERED

- Pharmaceutical Companies
- Venture Capitalists
- Regulatory Bodies
- Government Institutes
- Research and Academic Institutes
**Factors Studied for Market Forecast**

**Drivers**
- Increasing prevalence rate of cardiac diseases
- Rising investments in healthcare sector

**Restraints**
- High cost of therapy

**Report Coverage**

- Number of Pages: 110
- Number of Chapters: 13
- Number of Tables: 85
- Number of Figures: 49
- Number of Countries: 12
- Number of Expert Interviews: 43
- Number of Major Companies Profiled: 10

**Key Questions Answered**

- Market size for all segments, with growth rate from 2019 to 2025
- Top 11 players in the market
- Key strategies employed by major players in the market
- Opportunities in the diabetic ulcer treatment market
- Fastest growing region, its market value and growth rate

**Key Companies Profiled**
- Smith & Nephew (UK)
- Integra Lifesciences Corporation (US)
- Sanowave Health, Inc. (US)
- Cardinal Health (US)
- 3M (US)
- B. Braun Melsungen AG (Germany)
- Acelity L.P. Inc. (US)
- ConvaTec Group PLC (UK)
- Organogenesis Inc. (US)
- Mölnlycke Health Care AB (Sweden)
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