

## Bioengineered Wound Care

Products, Players and Prospects

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Bioengineered wound care technologies that mimic the body's natural structure and/ or healing processes are improving outcomes for patients with chronic and refractory wounds

These technologies include engineered skin substitutes, cellular and synthetic matrices, and biologically active therapies

The ability of this new class of wound care products to promote healing in otherwise refractory wounds is creating significant interest among healthcare researchers

Investment in this sector will grow significantly in the next five years, an indication of the perceived potential of these bioengineered approaches to wound management

Greystone Associates is pleased to announce the publication of a new market study. **Bioengineered Wound Care: Products, Players and Prospects** is a comprehensive evaluation and analysis of the markets, products and participants in the technology-driven advanced wound management segment of the Healthcare sector.

Published in April (2005), the study is designed to provide market sector executives, business development professionals, product marketers, research managers, and healthcare decision makers with a detailed understanding of the market dynamics, business impact and therapeutic potential for bioengineered wound care products and technologies. Provider organization business managers, healthcare administrators and investors will also benefit from this study.

### **New Tools and Treatments for Wound Management**

The introduction of new technologies and products for the treatment of acute and chronic wounds is providing caregivers with a set of powerful options that will have a profound effect on the field of wound management. These new treatment tools, which mimic the body's natural physiology and/or regenerative pathways, include tissue-engineered skin substitutes, regeneration matrices, and biologically active cellular therapies. First emerging as a viable treatment for refractory wounds in 1999, a number of products are currently available for certain indications, while others are in pre-clinical or clinical development.

These bioengineered products are competing in a worldwide market worth billions, and in which improvements in quality-of-life and treatment outcomes continue to be top healthcare industry initiatives. While pricing for these new-generation products represents a significant premium relative to existing wound care products, recent studies indicate their ability to promote healing in otherwise refractory wounds places them on a competitive plane in terms of total cost of treatment. As further data on patient outcomes becomes available, we expect the number of indications as well as third party payer acceptance of next-generation wound care products to increase, driving growth to significant levels by the middle of the decade.

## **Executive Summary**

### **Advanced Wound Care Market Dynamics**

#### Wound Market Segmentation

- Acute Wounds
- Chronic Wounds & Ulcers
- Surgical Wounds
- Burns

#### Market Demographics & Trend Lines

- Market Dynamics
- Factors Limiting Growth

#### Wound Care Industry Profile

- Industry Structure
- Competitive Landscape
- Technology Market Drivers

### **Engineered Wound Care Product Analysis**

- Acellular Matrices
- Allogeneic Matrices
- Allogeneic Sheets
- Bilayered Skin Substitutes
- Bioabsorbable Scaffolds
- Collagen Biomembranes
- Synthetic Membranes
- Xenografts

### **Market Sector Assessments & Opportunities**

- Acute Trauma
- Burns
- Diabetic Ulcers
- Pressure Ulcers
- Venous Ulcers

### **Business Sector Strategies and Risks**

- Proprietary Technology
- Near-term Capitalization
- Strategic Alliances & Partnerships
- Development Stage Transition Factors
- Enabling Technologies

### **Market Factors**

- Clinical Trial Factors
- FDA Guidelines
- Reimbursement
- Evolving Patient Demographics
- Point-of-Care Processing
- Protocols and End-Points

### **Company Profiles**

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## ***Market Data***

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The study presents qualitative and quantitative data and information on key market measures and benchmarks:

- Wound Care Market Assessment
- Bioengineered Wound Care Technology Analysis
- Product Status & Prospects
- Industry Structure
- Development State Transition Factors
- Emerging Markets
- Technology Factors
- Economic Factors
- Company Profiles
- Market Projections
- Strategic Alliances
- Proprietary Technology
- Market Factors
- Regulatory Factors

## Methodology

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Research methodology is based on primary research in the form of in-depth interviews with key market participants, technology developers, distributors, industry experts, and market influencers, a list that includes regulatory officials, industry trade groups, and materials standards organizations.

Primary data is evaluated and normalized against secondary sources including trade journal articles, technical literature, industry publications, company data sheets and published information, and statistical data from government agencies and trade associations.

Forecasts and projections of market demand and future market activity are derived using standard modeling and statistical techniques

## Feature Summary

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- Analyzes and evaluates the new generation of tissue-engineered and biologically active technologies and products for treating acute and chronic wounds
- Assesses business risk factors and market issues
- Provides detailed analysis of twenty-two bioengineered wound care products
- Forecasts technology and product developments, and projects probable market impact through 2009
- Profiles bioengineered wound care companies, their product development activity, and strategies
- Evaluates the impact of economic, technology, and regulatory factors

## Report Format and Availability

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This report is available in hard copy or electronic format. A site license for a single physical location and a global license are also available. Publication is scheduled for February 2007, with availability on or before February 15th.

## About Greystone Associates

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Greystone Associates is a medical technology consulting firm focused on the areas of medical market strategy, product commercialization, venture development, and market research. We assist medical and healthcare market participants in achieving their business objectives through the creation of detailed development strategies, product commercialization programs, and comprehensive market and technology research and analysis.

Our market research publications are designed, researched and written to provide timely and insightful information and data on focused market segments, with the aim of providing market participants with the essential knowledge to refine and execute their marketing plans and financial targets.

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